

RECEIVED

01 FEB 1996

Fax Cover Sheet

DATE: January 30, 1996

TIME: 7:47 PM

TO: Mr Peter Lines

PHONE:

INPUT Ltd

FAX: 01753 577 311

FROM: Roger Hart
Hart Russell Assoc.

PHONE: + 44 1892 730 646

FAX: + 44 1892 730 665

RE: Draft of NTT report. Paper and disk version to follow tomorrow

CC:

Number of pages including cover sheet: 15



Draft 1

NTT

- Suisai Watercolour Painting Package

Market Sizing and Segmentation Project

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1. Summary

We believe the UK potential market for the Suisai product is about 6550 units in the first year dropping to about 3000 units in the second year.

The product should be targeted to retail at about £18.00 which means it can be sold into the distribution chain at about £13.62.

We doubt that this product will make significant profits for NTT and we believe NTT should consider carefully the strategy and market positioning it wishes to adopt in the European market. In the European market it would be considered strange for a PTT to be marketing low-end software to the mass market.

The UK software market (excluding games) seems to be growing slowly at about 5%/year and there are signs of saturation in commodity software markets.

You should plan to publish this product as if it were an education sector product and therefore plan for a 20% Windows 95/80% Windows 3.1 split.

There is a strong link between the PC magazines and the distribution chain. In order to make 'a big splash' it will be necessary to co-ordinate distribution channels and PC magazine reviews. This will require effort and an advertising budget.

We do not believe packaging the Suisai product with a Genius EasyPainter tablet will significantly improve the sales prospects.



2. Potential Market in the UK

The UK is one of the most buoyant European markets for home computer and small business software. With English being the main language used in computing and America as the main source of game and other software one of the main barriers to acceptance is non-existence.

The UK market also made an early start in the PC software business and has an extensive PC magazine and game magazine culture. A visit to any high street magazine store will show more space devoted to computer and game magazines than any other interest group.

However, there are signs that the growth rate for software purchases in the UK is slowing in value terms to around 5% growth/year, in effect the market is beginning to saturate particularly in commodity software. This means that new software titles coming to market must be very new and very exciting in order to generate a new market and rapid growth.

Overall market

The overall PC software market in the UK is estimated at some £1.2Bn in 1995 of which the breakdown by application is:

Business software	£724 million
Leisure software	£ 42 million
LAN software	£339 million
Operating System	£ 93 million

Of the business software application area, paint/draw packages made up about 1.5% of the market by value. This includes packages such as Corel Draw, Adobe Photoshop and so on which leads to a market value of some £11 million/year.

However, simple paint/draw packages such as Suisai barely feature at all in advertising aimed at the business sector and we believe you are unlikely to capture much of this market. At 1% this would make a market value to Suisai of about £110,000/year.

The leisure software market is heavily dominated by games software, the leisure market breaks down by unit purchases into:

Games	80%
Educational software	15%
CD ROM titles	5%

In value terms the leisure market breaks down into:

Games	70%
Educational software	13%
CD ROM titles	17%

Of the leisure software application area, paint and draw packages make up about 0.5% of the market by value leading to a market value of £210,000/year. With good magazine reviews and extensive publicity we estimate the Suisai product may be expected to capture some 15% of this market representing a value of £32,000/year.



Later in this report some further data from the Software Publishers Association are given. The SPA publishes popularity charts for a wide range of software - for example:

- Top 15 CD Titles
- Top 15 Education titles
- Top 15 Entertainment titles
- Top 10 Business Productivity titles
- Top 10 Personal Productivity titles
- Top 15 Reference titles
- Top 15 Utilities titles
- Top 5 Games titles

The names of the titles do not always indicate the kind of software product but examining the titles we can see the dominance of game, cartoon and Internet titles.

Breakdown of Top 15 CD titles

Category	Number
Games	9
Utilities	2
Operating sys.	2
Screen savers	1
Internet access	1

Of the above titles, the operating systems were Windows 95 releases from Microsoft in Win 95 format. The breakdown of disk formats was:

Operating system	Number	
DOS	7	
Win 3.1/3.5/MPC	4	
Win 95	4	(of which 3 were MicroSoft launches)

Breakdown of Top 15 Educational titles

Most of the educational titles are childrens games or storybooks but other categories are included:

Category	Number
Storybook	5
Language training	3



Cartoon	2
Activity book	2
Math teaching	2
Software training	1

Breakdown of Education Title operating system

Operating system	Number	
Win 3.1/3.5/MPC	12	
Win 95	3	(of which 1 was a Win 95 teaching aid)

Breakdown of Top 15 Entertainment Titles

Category	Number
Cartoon	13
Activity book	1
Other	1

Breakdown of Entertainment Title operating system

Operating system	Number
DOS	11
Win 3.1/3.5/MPC	3
Win 95	1

Windows 3.1/Windows 95

Whether a package should be marketed in Windows 3.1 or Windows 95 format depends on the target market segment, most home users and small businesses still use Win 3.1 but new PCs are being sold with Win 95 loaded. In the corporate sector most users are still using Win 3.1 although 'power users' are moving to NT Workstation.

From the above data and our industry experience we can conclude that new titles are being published in the following formats:

	Games	Educational	Business
DOS	58%	0%	0%
Win 3.1	33%	80%	85%
Win 95	9%	20%	15%



Educational market

The education sector is a clearly identified part of the overall UK market. Education has an interest in teaching art and painting but appears to be heavily under funded. However we believe the education sector is more valuable to NTT from a publicity point of view. NTT should be aware that British Telecom has a department specifically tasked with supplying educational materials and is also interested in wiring up schools to the Internet. There are great opportunities here and also political minefields for new entrants such as NTT.

With over 4000 secondary schools and over 23,000 infant schools there is a potentially large educational software market. This has been developed over the last 10 or so years and most schools have several PC or PC compatible machines.

In the UK the number of schools breaks down as follows:

Nursery schools (age 2 - 5)	1,477	
Primary school (age 5 - 11)	23,523	
Secondary schools (age 11 - 18)	4,478	(the main market)
Private sector schools (age 5 - 18)	2,470	(also a large market)
Schools for special needs	1,714	
Colleges of Further Education (age 16 - 25)	701	
Degree level Colleges (age 18 - 25)	110	
Universities (age 18 - 25+)	110	

The sale of computer products to the education sector is well developed with specialist journals, exhibitions and conferences. Although there are some specialist suppliers to this market the highly cost-conscious nature of education in the UK means that most supplies are bought by mail order.



3. Market segmentation and pricing

Segmentation

For the purposes of this report we have segmented the market as follows:

Business

Education

Graphic Art

Hobby Art

Computer hobbyist.

Business

The business market comprises all the business sectors including those people who work at home but excludes all artists and graphic arts firms. We consider artists and graphic arts firms separately

Although there are over 2 million registered companies in the UK only about 1.2 million are actively trading. Of these the vast majority are very small businesses employing between 2 and 20 people. If they use a computer at all it is purely to produce letters and invoices.

The remainder consist of the mainstream Financial Times Top 1000 companies followed by some 10,000 small/medium companies. Of this grouping we estimate about 10% will have some form of graphics department - making about 1000 companies and of these you may expect say 20% - about 200 larger companies to be potential buyers for a watercolour painting package for a 'one off' application. This market segment is in addition to the Graphic Arts market.

Smaller companies including high-street printing shops and so on may be expected to account for a further 2,200 packages over the first two years of the market, 1500 in the first year and 700 in the second year.

Education

The education market comprises all the schools in the UK. This would include all primary and secondary schools and also all universities and colleges of further education. There are the following numbers of educational establishments in the UK:

Primary schools

Secondary schools

Colleges of Further Education

Universities.

The Primary and Secondary Schools are divided into the privately funded sector - (called Public schools) and the state funded sector. Some schools draw their funding from both sources. Distribution to the Primary and Secondary schools is a major problem. Within the state sector all mainstream purchases are funded by local government. Lack of money is a perpetual problem and there is little room for



discretionary purchases such as a watercolour painting package. However, the schools do have the opportunity to buy almost anything they wish through funds raised by local business and parents.

The privately funded sector has more freedom over discretionary purchases and generally seeks to offer a wide variety of educational experiences to its clients. Nevertheless funding is tightly controlled.

Well targeted publicity aimed at the education market and a discount for educational users would we believe result in worthwhile sales in this sector. Most schools are sophisticated buyers and buy from the cheapest sources - usually mail order.

The Colleges of Further Education have close links with industry and will frequently be using the more sophisticated business graphics packages. Many colleges have an art department but we believe this will focus more on the manual processes of painting.

The universities and the art colleges are concerned with higher level manual skills and with the theory and history of art. These organisations will also be interested in the use of computers as a medium for producing art but this is more likely to be 'computer art', creating art forms that cannot be created by manual means.

We believe that Colleges of Further Education, Universities and Art Colleges will represent poor markets for the Suisai product.

We estimate potential sales to the education market of 1000 in the first year and 500 in the second year.

Graphic Art

The Graphic Art market consists of all the advertising companies, the newspapers and the magazine companies.

The Graphic Art market is dominated by professionals who are familiar with most of the mainstream Graphics packages - Corel Creator, Adobe Photoshop, Corel Draw and other high-end packages. This group of people are not likely to be volume purchasers of Suisai because they will almost always have the ability to create almost any kind of graphic with the tools they have.

A large sub-segment within the graphic art market consists of photocopying shops and letterpress shops that produce low-end graphics for small businesses and for retail customers. These shops frequently produce menus, posters, leaflets and other advertising material. The Suisai product may require too much artistic effort but with the addition of a 'clip-art' library and some targeted examples this sub-segment may produce useful volumes.

We believe potential sales to this market will not exceed 1000 units.

Hobby Art

The hobby art market for amateur painters is fairly well developed in the UK. Painting is fairly popular and watercolour painting is regarded as a hobby for 'the older, well off middle classes'. Unfortunately very few of the 'older, well off middle classes' regard computers as an appropriate medium for producing art. There is possibly some room for the Suisai product in the educational classes attended by those people learning watercolour painting but most of these classes will use the same facilities as the schools there is no additional market.

Possible niche markets in the hobby segment include the teaching of painting to the disabled and to people in prisons and in hospitals. These niche markets are unlikely to produce significant sales volume but



could serve as markets in which free software (and probably hardware) could gain useful publicity for NTT.

We believe that potential sales to the hobby art segment will be rather low, of the order 500 units.

Computer Hobbyist

Earlier in this report we have mentioned the vast number of magazines sold into the professional and hobby markets. Many of the buyers of these magazines are interested in some aspect of computing allied with games or with some professional or semi-professional interest in computers.

However, the typical computer hobbyist is male, aged 17 to 25 and we believe few are sufficiently interested in painting/graphics to pay for a watercolour painting package. We believe sales are not likely to exceed 1000 units.

Taking the sum of all the above market segments we get an estimated 5,200 unit sales in the first year.

Pricing

As in all markets, pricing is key. The market price for a painting package is dictated by the market leader - Microsoft FineArt at a retail price of £25 with other packages selling at about £16.99 and £9.99. We doubt that Suisai can attract a price premium and will have to retail at about £18.00 if any success in the market is to be achieved.

Assuming the retail price is set at £18.00 the overall volumes are determined by the market value figures estimated earlier. We estimate the accessible market values to be:

Business sector	£110,000
Leisure sector	£ 32,000
Total	£142,000

This suggests total volume sales/year of about 7,900 units. This is somewhat above the estimated sales volumes of 5,200 units but the agreement is sufficiently close to suggest our estimates are reasonably robust. The two figures represent optimistic and pessimistic estimates of market volumes and so for market sizing purposes we advise taking the mid point - 6,550 units.

Taking into account the typical margins for distribution

	Margin	Buy-in price	Selling-on price
Retailer	20 - 25%	£13.95	£18.00
or Mail order	15 - 20%	£13.62	£16.50
Distributor	10 - 15%£11.91	£13.62/13.95 depending on channel

So the value to NTT will be approximately £89,000 less the cost of manufacture/packaging/administration assuming sales of 6,550 units.



4. Distribution methods

The distribution chain is well developed with over 10,000 PC and game software stores distributed across the UK and a well developed mail order channel through the many magazines. Some ordering also takes place through home catalogues.

Within the UK the method of distribution varies slightly between business software and leisure software, this is shown in the tables below:

Business software distribution

Specialist dealers	70%
Mail order	25%
High Street stores	5%

Leisure software distribution

Specialist dealers	30%
Mail order	28%
Computer retailers	20%
High Street stores	22%

However, although the market is very large it is heavily dominated by game software, SOHO applications and educational/reference software. A recent inspection of a PC supermarket - PC World - which is owned by DIXONS, a major UK retailer, showed comparable painting packages displayed in two sections - Education and Home Office.

In the Educational section packages such as Microsoft FineArtist was offered at £25 whilst DoodleMation by Screen Magic was offered at £16.99. In the Home Office section packages such as Powerpoint were offered at £249, Adobe Personal at £300 and Astound at £189. At the bottom end of the market a simple painting package Art Shop was offered at £9.99.

The 'hot spot' in the business/home office section was reserved for 3D graphic and rendering packages where some 15 titles were displayed at prices ranging from £70 to £250.

The Suisai product would be regarded by the distribution chain as a simple commodity product with modest volume prospects. This means it would be distributed through a two tier distribution channel - a main or wholesale distributor and then into the retailer, mail order and Value Added Reseller markets before it was finally sold to the business or leisure sectors.

The UK wholesale market is serviced by the 'big three' distributors:-

Frontline

Ingram Micro

Merisel.



The 'big three' distributors are primarily American and operate worldwide. If NTT gets into the software publishing business then it would be wise for NTT to develop a strategic relationship with these companies. You should also check whether you already have a relationship with these distributors.

For the modest volumes we envisage for the Suisai product the main retail outlets - W H Smith, Dixons and so on would not normally be interested in dealing directly with NTT, they would deal with the distributors instead.

The procedure for entering the distribution chain with Frontline, Ingram Micro and Merisel is fairly standardised. The procedure is as follows:

Establish contact with the distributor's Director of Product Marketing

Send details of the product (literature, prospective market, expected volumes, expected pricing and if requested to do so a sample of the product)

The distributor will review the product and decide whether it feels the product is worth marketing

If the distributor wishes to go ahead and carry the Suisai product then commercial arrangements for supply, product call-off rates, pricing policies and so on can be negotiated.

As an approximate guideline, the normal margins required by the distribution channel participants are:

Retailer	20 - 25%
Mail order	15 - 20%
Distributor	10 - 15%.

NTT should be very sensitive to the fact that the mainstream distributors we have mentioned are fussy about the products they choose. If they all refuse to distribute the product or demand excessive margins then the Suisai product has a big problem. Therefore it is important to develop a relationship with the Director of Marketing (or equivalent) within the chosen distributors.

You should make sure that NTT's approach to them is sensitive to the fast-moving, profit-oriented nature of their business. These companies are in a low-margin, high-volume business and are constantly being offered new products. They review all new products and take a hard-nosed view of the likely profits to be made from the offered product. One company we spoke to - Frontline - claimed not to be taking on any new products.



UK contacts:

Frontline Distribution Limited (David Clark - Director of Product Marketing)
Hampshire House
Basingstoke
Hampshire
RG24 8PL
Telephone: 01256 463344 or 01256 847880

Ingram Micro Limited (Justine Bowers)
Garamond Drive
Wymbush
Milton Keynes MK8 8DF
UK

Telephone: 01908 260160

Merisel Distribution Limited (Kate Tarry)
941 Great West Road
Brentford
Middlesex
TW8 9DD

Telephone: 0181 568 8866 or 0181 490 5000



5. Advertising and promotion issues

Because NTT and the Suisai product line is practically unknown to prospective purchasers it will be important to make a big 'splash' in the market when the product is introduced. One of the main ways to achieve good coverage is through the computer magazines, a good product review is essential to winning over the distribution channels as well as end users.

The importance of a good magazine review is emphasised by a comment from Roger Hipwell business unit manager at Computer Associates. He recently stated 'I believe we (the suppliers) are now in the fashion business, undergoing management by magazine'. The importance of this statement lies in the two phrases - 'fashion business' and 'management by magazine'.

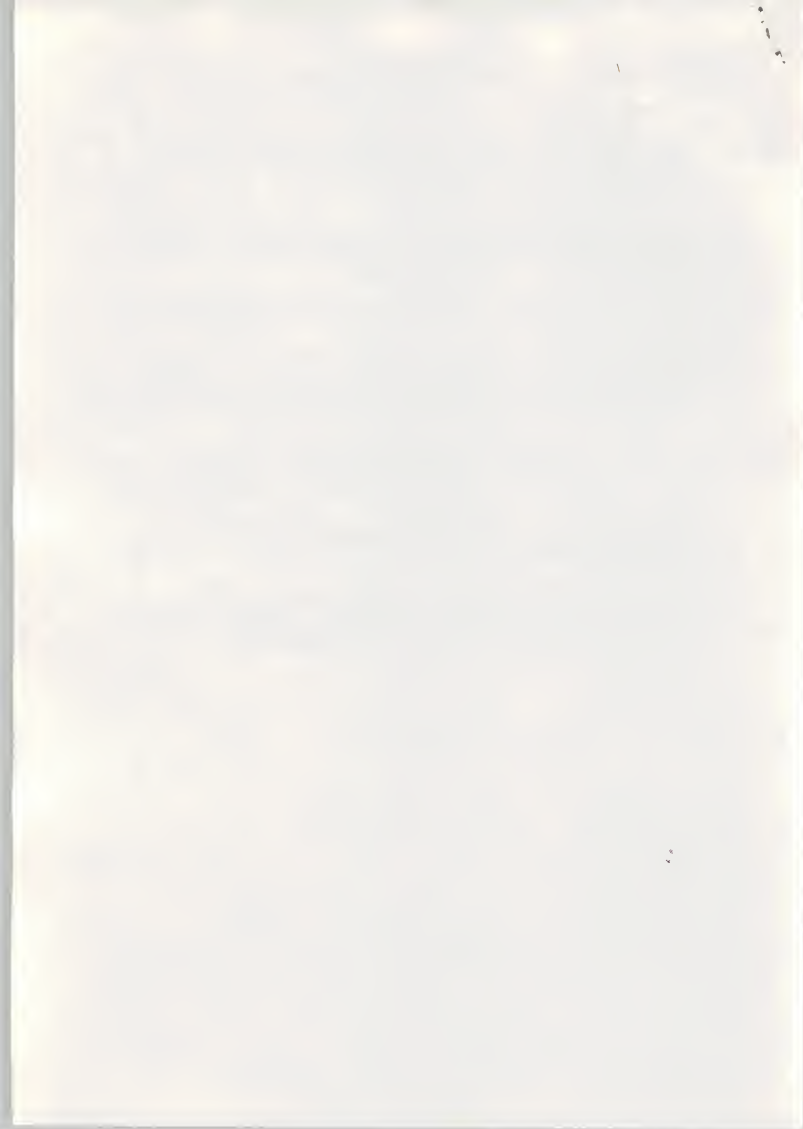
The reference to the fashion business means that the market is volatile with many of the characteristics of the women's clothing industry - one month a style is 'in' and a few months later a different style is 'in'.

The reference to 'management by magazine' refers to the importance of good magazine reviews. In general magazine reviews are a superficial review of the impression a product has made on an industry 'guru'. It would be important to co-ordinate magazine reviews with the launch into the distribution channels. In fact we believe that the main distributors would be a valuable asset in helping you to select suitable magazines and gurus for a favourable review.

A strategic problem we believe NTT should consider carefully is the position of NTT as a PTT versus NTT's position as a software producer - particularly as a producer of 'low-end' and game software products. None of the European PTTs has made a success of the entries they have made into the commodity software markets and they now confine their efforts to system integration projects.

A related issue is the use of products like Suisai as demonstrations of NTT's skills in software and of NTT's skills as a system supplier. This means making Suisai available as 'freeware' or as part of a wider marketing package.

You also asked us to comment on the possibility of packaging the Suisai product with a Genius EasyPainter pen tablet. This pen product makes using the Suisai (or any other drawing/painting) package easier to use. We believe this will not improve sales of the Suisai product significantly and we believe the Suisai package may become discounted as a 'freeware' package to demonstrate the capabilities of the Genius tablet.



U

Mr Eiichi Nakamura
General Manager
NTT Data Communications Systems Corporation
UK Branch
5th Floor
30/34 Moorgate
LONDON EC2R 6DN

9th May 1996

Dear Eiichi

Suisai Software Research Report

Please find enclosed five copies of the above report, issued in hard back version as promised. Apologies for the delay, this is due to the long lead times required for binding. Should you need any further assistance from INPUT, please do not hesitate to call.

Kind regards

Christopher Harris
Senior Consultant for INPUT Ltd.



Mr. Eiichi Nakamura
General Manager
NTT Data Communications Systems Corporation UK Branch
5th Floor
30/34 Moorgate
LONDON EC2 6DN
3 April 1994

Dear Eiichi

Apologies for not replying sooner to your query concerning the Suisai report on page 9, bottom paragraph. You will recall that I promised to explain how we derived an estimated figure of 1.5% for the percentage of business graphics software attributable to paint/draw bitmap applications. Here is the explanation:-

The base data was drawn from a report produced by Market Assessment Publications, which specialises in supplying information about published software titles in the UK.

For 1994 (the most recent year available), the market shares for different titles were as follows:

TITLE	%
word processing	18.2
spreadsheet	16.8
accounts	11.5
databases	5.7
graphics	8.7
CAD	5.6
compilers	7.6
vertical markets	4.3
integrated packages	4.0
desktop managers	2.3
leisure software	5.4
others	9.9

100% = £576.6 million---> £1197 million in 1996
(extrapolated)

We have assumed that the figure of 8.7% representing the market share for graphics titles is still valid for 1996. The next issue we considered was what constitutes 'graphics software'. In practice, this market can be further subdivided as :



- paint/draw packages (i.e. direct competitors to Suisai)
- illustration packages (including those for the DTP market)
- presentation graphics packages

From the same report, we know that of the 8.7%, two thirds of this figure is comprised of illustration packages (made up chiefly by sales of Aldus Pagemaker):

By definition, the remaining one third of the 8.7% is therefore attributable to paint/draw packages and presentation graphics, i.e.:-

$$(1 - 0.66) \times 8.7\% = 2.9\%$$

We have then made a value judgment that the market share split between the two segments is half and half, i.e.:-

$$50\% \text{ of } 2.9\% = \text{approximately } 1.5\%$$

We can say this with reasonable confidence, knowing that the upper market share limit for paint/draw packages is approximately 2.9% and the lower limit is 0%.

I hope that you find this explanation to your satisfaction.

There were a few of other issues I wanted to mention in this correspondence.

Firstly, the Suisai report has been submitted to our printers and it is our intention to issue you with five bound copies as soon as we receive them.

Secondly, please find enclosed the Genius Graphics Tablet. Many thanks for making its use available to us.

Thirdly, you mentioned in passing your company's interest in electronic commerce and particularly the use of the Mondex card. (You are no doubt aware of Mondex's alliance with Hitachi in Japan). I can confirm that the study of this market is of particular interest to INPUT as we believe that the impact of smart cards and electronic purses is potentially very large on the banking and finance industry.

We have considerable expertise in this field, including an Electronic Commerce Programme run from one of our offices in the United States. If you would like to discuss this issue further, please do not hesitate to give me a call.

Eiichi, we very much look forward to doing business with you again in the near future.

Yours sincerely

Christopher Harris
INPUT Ltd.



Mr Chris Harris
INPUT
Cornwall house
55-77 High Street
Slough
Berkshire
SL1 1DZ



Sparrows Cottage
Benover Road
Yalding
Maidstone
Kent ME18 6AZ
Tel: 01892 730646
Fax: 01892 730665

24th March 1996

Dear Chris

Herewith the explanation of how I arrived at the NTT market share data.

I enjoyed our run-through of the Comdisco project and I think the kind of phased delivery approach is the right one. We may as well be fairly strong about how we think the job should be done - we are the professionals. If you want to fax a draft for comment to 01892 730665 please do. Don't bother with a copy of the proposal unless the job goes live.

I plan to be away over Easter but the fax and answer mc will be on.

Yours sincerely

Roger Hart



NTT Suisai Report - Clarification of Paint/Draw market share data

The basic data drawn from the Market Assessment Publications report showed annual revenues for PC software in the UK as:

	1989	1990	1991	1992	1993	1994	1995	1996
£M	479	495	570	653	835	952	1067	1197 1995/1996 extrapolated

Also the basic data (for 1994) gives the following breakdown of software type:

	£M	%
Wordprocessing	110.6	18.2
Spreadsheet	102.5	16.8
Accounts	70.0	11.5
Databases	34.5	5.7
Graphics	53	8.7
CAD	34	5.6
Compilers	46	7.6
Vertical Markets	26.5	4.3
Integrated packages	24.5	4.0
Desktop managers	14.0	2.3
Communications	7.4	1.2
Languages	5.0	0.8
Others	32.6	5.4
Total	575.6	94.6

The remaining 5.4% of the market by value is leisure software.

However, this is for 1994 (the report was published in 1995) so the results have been uplifted by 12%/year (the most recent growth) to reach 1996. The 5% growth rate mentioned in the report was derived from another report - Ovum Business Applications published in Jan 95 although this was not really very helpful in breaking down PC application types. The Ovum report seems to back up other data regarding low growth rates from the Software Publishers Association.

The problem is that the graphics market looks like £53 million and 8.7%. But this is for paint/draw packages, illustration packages and presentation graphic packages. From the application breakdown it also seems illustration packages include Desktop Publishing.

By far the most expensive packages are the DTP and so the following split by value was estimated from associated market share data (the DTP suppliers dominate):

Paint/draw	15%
Illustration (inc DTP)	65%
Presentation graphics	20%

This breakdown is at least partially justified by data later in the source report, the illustration (DTP) market being dominated by Aldus (Pagemaker) with an overall illustration market value of some £35 million. This makes about 66% of the graphics market. The remainder of the market is split (we estimate) approximately evenly between paint/draw packages and presentation graphics with a bias toward presentation graphics because of their very widespread use in business.



Using the above split to break up the Graphics market share of 8.7% we get:

$$8.7 * 0.15 = 1.3 \text{ percent (this is where the 1.5\% figure comes from)}$$

$$8.7 * 0.66 = 5.7 \text{ percent (for the DTP market)}$$

$$8.7 * 0.2 = 1.75 \text{ percent (for the presentation graphics market)}$$

The figure of 1% market share for Suisai is our estimate. The low-end Paint/Draw package market seems fairly stagnant with Microsoft and ... dominating the market. Without a 'big splash' and very attractive features any new package is unlikely to gain significant market share in a non-growth market.

However there does appear to be a market for packages that offer cartoon animation, 3D graphic image creation and the 'feel' of natural painting and drawing media. These give the artist the crumbly texture of chalk, crayons bring out the texture of the underlying paper and light reflects off the edges of thick oil paint strokes. Packages with these features have retail prices in the £200 to £450 region and are aimed at the professional and serious amateur markets. In terms of market segment these tools appear to belong in the CAD segment and we estimate this segment has increased beyond the 5.6% by value it had in '94.

There is clearly a market for this type of product but Suisai is not sophisticated enough to make a big splash at the professional/serious amateur end of the market and the low-end market is dominated by Microsoft. NTT will need to take a serious look at the competition, develop a more sophisticated product very quickly and at the same time develop a relationship with the retail/distribution channels.



Non Client/Prospect File: ☐ Media ☐ Financial ☐ Other ☒

Contact Date:

INPUT Staff: Init. PL Init. ☐ INPUT office ☒ Client Office ☐ Other

Date Written:

16.01.96Cor
Na
Titl
Ack
Phc
FaxNTT
dataMASAKI MUROTA
ManagerNTT DATA COMMUNICATIONS SYSTEMS
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FAX 0171-374-2275
5th Floor, 30/34 Moorgate,
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FAX 0171-374-2275
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5th Floor, 30/34 Moorgate,
London EC2R 6DN U.K.

OBJECTIVES OF MEETING:

NTT TO DESCRIBE PRODUCT

— COMPETITIVE POSITION IN JAPAN?

PROVIDE DEMO PACK

CONFIRM PROJECT OBJECTIVES + TIMELINE. (6 WEEKS).

CURRENT (UK) MARKET SIZE / OPPORTUNITY
+ FORECAST GROWTH

RSCH

— CHANNELS

WHO MIGHT BUY / SEGMENT — CLASSIFY

— PC STORES / HIGH STREET. WIN 3.1 v WIN 95

— MAIL ORDER / MAGAZINES

DISTRIBUTION CHANNELS — STRUCTURE +
MEANS OF ENTRY

PRICING LEVELS

☐ Continued over

Mail List Change Order ☐ Update ☐ Correction ☐ Deletion ☐ Addition* Serial Number _____

U.S. COMMERCIAL

1. TYPE ☐ Vendor ☐ User ☐ Investor / Financial ☐ Media / Press ☐ Other ☐ EDI Newsletter

2. LEVEL ☐ Executive ☐ Manager ☐ Analyst ☐ Acquisition ☐ International ☐ Other

3. INTERESTS ☐ C/S ☐ Computer Systems ☐ Networks ☐ EC ☐ Information Services —
☐ EIS / CIS / Multimedia ☐ Other
☐ Software Products
☐ Professional Services, SI
☐ Outsourcing, Processing, Network Services

☐ Industry _____

U.S. FEDERAL ☐ MMAR ☐ FPAP ☐ FPAW ☐ FPFA ☐ Other

EUROPE ☐ CSPR ☐ MAAP ☐ MSSP ☐ MVPP ☐ BIPR ☐ OSPR ☐ U.S.A. ☐ Other

* No names will be added without a completed change order and program manager approval. Program Manager Authorization _____

CONTACT REPORT

Continuation

Company _____

Name _____

Draft #2

Fax Cover Sheet

DATE:	February 7, 1996	TIME:	9:47 AM
TO:	Mr Peter Lines	PHONE:	
	INPUT Ltd	FAX:	01753 577 311
FROM:	Roger Hart	PHONE:	+ 44 1892 730 646
	Hart Russell Assoc.	FAX:	+ 44 1892 730 665
RE:			
CC:			

Number of pages including cover sheet: 15**Sheets are marked up with errors/editorial changes for this report.****Software and pen pad being mailed today.**



NTT

- Salsal Watercolour Painting Package

Market Sizing and Segmentation Project

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1. Introduction

2. Summary

3. Potential Market in the UK

4. Market segmentation and pricing

5. Distribution methods

6. Advertising and promotion issues



1. Summary

We believe the UK potential market for the Suisai product is about 6550 units in the first year dropping to about 3000 units in the second year.

The product should be targeted to retail at about £18.00 which means it can be sold into the distribution chain at about £13.62: £11.91

We doubt that this product will make significant profits for NTT and we believe NTT should consider carefully the strategy and market positioning it wishes to adopt in the European market. In the European market it would be considered strange for a PTT to be marketing low-end software to the mass market.

The UK software market (excluding games) seems to be growing slowly at about 5%/year and there are signs of saturation in commodity software markets.

You should plan to publish this product as if it were an education sector product and therefore plan for a 20% Windows 95/80% Windows 3.1 split.

There is a strong link between the PC magazines and the distribution chain. In order to make 'a big splash' it will be necessary to co-ordinate distribution channels and PC magazine reviews. This will require effort and an advertising budget.

We do not believe packaging the Suisai product with a Genius EasyPainter tablet will significantly improve the sales prospects.

$$\begin{aligned} 4000 \times £11.91 &= £47,640 \\ 6000 \times £11.91 &= £71,460 \end{aligned}$$

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2. Potential Market in the UK

The UK is one of the most buoyant European markets for home computer and small business software. With English being the main language used in computing and America as the main source of game and other software one of the main barriers to acceptance is ~~the language~~ *removed.*

The UK market ~~has~~ made an early start in the PC software business and has an extensive PC magazine and game magazine culture. A visit to any high street magazine store will show more space devoted to computer and game magazines than any other interest group.

However, there are signs that the growth rate for software purchases in the UK is slowing in value terms to around 5% growth/year, in effect the market is beginning to saturate particularly in commodity software. This means that new software titles coming to market must be very new and very exciting in order to generate a new market and rapid growth.

Overall market

The overall PC software market in the UK is estimated at some £1.2Bn in 1995 of which the breakdown by application is:

Business software	£724 million ✓
Leisure software	£ 42 million ✓
LAN software	£339 million ✓
Operating System	£ 93 million ✓

Computer Software's
Market Assessment publication Ltd.
source: Mac Science Ref Lib.

Of the business software application area, paint/draw packages made up about 1.5% of the market by value. This includes packages such as Corel Draw, Adobe Photoshop and so on which leads to a market value of some £11 million/year.

However, simple paint/draw packages such as Suisai barely feature at all in advertising aimed at the business sector and we believe you are unlikely to capture much of this market. At 1% this would make a market value to Suisai of about £110,000/year.

The leisure software market is heavily dominated by games software, the leisure market breaks down by unit purchases into:

Games	80%
Educational software	15%
CD ROM titles	5%

Software Publisher's Association.
Web page on internet
webpage SPA.com

In value terms the leisure market breaks down into:

Games	70%
Educational software	13%
CD ROM titles	17%

Of the leisure software application area, paint and draw packages make up about 0.5% of the market by value leading to a market value of £210,000/year. With good magazine reviews and extensive publicity we estimate the Suisai product may be expected to capture some 15% of this market representing a value of £32,000/year.

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Below we give

~~Below we give~~ some ~~sample~~ data from the Software Publishers Association ~~software~~. The SPA publishes popularity charts for a wide range of software - for example:

Top 15 CD Titles
 Top 15 Education titles
 Top 15 Entertainment titles
 Top 10 Business Productivity titles
 Top 10 Personal Productivity titles
 Top 15 Reference titles
 Top 15 Utilities titles
 Top 5 Games titles

same source

The names of the titles do not always indicate the kind of software product but examining the titles we can see the dominance of games, cartoon ~~and~~ titles.

and
 Breakdown of Top 15 CD titles

Category	Number
Games	9
Utilities	2
Operating sys.	2
Screen savers	1
Internet access	1

11

Of the above titles, the operating systems were Windows 95 releases from Microsoft in Win 95 format. The breakdown of disk formats was:

Operating system	Number
DOS	7
Win 3.1/3.5/MPC	4
Win 95	4 (of which 3 were MicroSoft launches)

11

Breakdown of Top 15 Educational titles

Most of the educational titles are childrens games or storybooks but other categories are included:

Category	Number
Storybook	5
Language training	3

11

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Cartoon	2
Activity book	2
Math teaching	2
Software training	1

Breakdown of Education Title operating system

Operating system	Number
Win 3.1/3.5/MPC	12
Win 95	3

(of which 1 was a Win 95 teaching aid)

Breakdown of Top 15 Entertainment Titles

Category	Number
Cartoon	13
Activity book	1
Other	1

Breakdown of Entertainment Title operating system

Operating system	Number
DOS	11
Win 3.1/3.5/MPC	3
Win 95	1

Windows 3.1/Windows 95

Whether a package should be marketed in Windows 3.1 or Windows 95 format depends on the target market segment, most home users and small businesses still use Win 3.1 but new PCs are being sold with Win 95 loaded. In the corporate sector most users are still using Win 3.1 although 'power users' are moving to NT Workstation.

From the above data and our industry experience we can conclude that new titles are being published in the following formats:

	Games	Educational	Business
DOS	58%	0%	0%
Win 3.1	33%	80%	85%
Win 95	9%	20%	15%



Educational market

The education sector is a clearly identified part of the overall UK market. Education has an interest in teaching art and painting but appears to be heavily under funded. However we believe the education sector is more valuable to NTT from a publicity point of view. NTT should be aware that British Telecom has a department specifically tasked with supplying educational materials and is also interested in wiring up schools to the Internet. There are great opportunities here and also political minefields for new entrants such as NTT.

With over 4000 secondary schools and over 23,000 infant schools there is a potentially large educational software market. This has been developed over the last 10 or so years and most schools have several PC or PC compatible machines.

In the UK the number of schools breaks down as follows:

Nursery schools (age 2 - 5)	1,477	
Primary school (age 5 - 11)	23,523	
Secondary schools (age 11 - 18)	4,478	(the main market)
Private sector schools (age 5 - 18)	2,470	(also a large market)
Schools for special needs	1,714	
Colleges of Further Education (age 16 - 25)	701	
Degree level Colleges (age 18 - 25)	110	
Universities (age 18 - 25+)	110	

The sale of computer products to the education sector is well developed with specialist journals, exhibitions and conferences. Although there are some specialist suppliers to this market the highly cost-conscious nature of education in the UK means that most supplies are bought by mail order.

department of Employment & Ed^l Statistics.
 issue 10/94
 Statistical Bulletin (16-18yolds) July '94

Statistic: B^l 8/94 (Statistics of
 Schools in
 England Jan'93)

HMSO

[Education facts & figures England 1995,
 pub. of Dept for Education.]

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3. Market segmentation and pricing

Segmentation

For the purposes of this report we have segmented the market as follows:

Business

Education

Graphic Art

Hobby Art

Computer hobbyist.

Business

The business market comprises all the business sectors including those people who work at home but excludes all artists and graphic arts firms. We consider artists and graphic arts firms separately

Although there are over 2 million registered companies in the UK only about 1.2 million are actively trading. Of these the vast majority are very small businesses employing between 2 and 20 people. If they use a computer at all it is purely to produce letters and invoices.

The remainder consist of the mainstream Financial Times Top 1000 companies followed by some 10,000 small/medium companies. Of this grouping we estimate about 10% will have some form of graphics department - making about 1000 companies and of these you may expect say 20% - about 200 larger companies to be potential buyers for a watercolour painting package for a 'one off' application. This market segment is in addition to the Graphic Arts market.

Smaller companies including high-street printing shops and so on may be expected to account for a further 2,200 packages over the first two years of the market, 1500 in the first year and 700 in the second year.

Education

The education market comprises all the schools in the UK. This would include all primary and secondary schools and also all universities and colleges of further education. There are the following numbers of educational establishments in the UK:

Primary schools

Secondary schools

Colleges of Further Education

Universities.

The Primary and Secondary Schools are divided into the privately funded sector - (called Public schools) and the state funded sector. Some schools draw their funding from both sources. Distribution to the Primary and Secondary schools is a major problem. Within the state sector all mainstream purchases are funded by local government. Lack of money is a perpetual problem and there is little room for

1. The first of these is the fact that the
2. of the system is not a simple one.
3. It is a complex one, involving many
4. factors, and it is not possible to
5. give a simple answer to the question
6. of what is the best system.
7. The second of these is the fact that
8. the system is not a static one.
9. It is a dynamic one, and it is
10. possible to change the system
11. at any time. This is a good thing,
12. because it allows the system to
13. adapt to changing circumstances.
14. The third of these is the fact that
15. the system is not a perfect one.
16. It is an imperfect one, and it is
17. possible to make improvements
18. to it. This is a good thing, because
19. it allows the system to become
20. more efficient over time.

discretionary purchases such as a watercolour painting package. However, the schools do have the opportunity to buy almost anything they wish through funds raised by local business and parents.

The privately funded sector has more freedom over discretionary purchases and generally seeks to offer a wide variety of educational experiences to its clients. Nevertheless funding is tightly controlled.

Well targeted publicity aimed at the education market and a discount for educational users would we believe result in worthwhile sales in this sector. Most schools are sophisticated buyers and buy from the cheapest sources - usually mail order.

The Colleges of Further Education have close links with industry and will frequently be using the more sophisticated business graphics packages. Many colleges have an art department but we believe this will focus more on the manual processes of painting.

The universities and the art colleges are concerned with higher level manual skills and with the theory and history of art. These organisations will also be interested in the use of computers as a medium for producing art but this is more likely to be 'computer art', creating art forms that cannot be created by manual means.

We believe that Colleges of Further Education, Universities and Art Colleges will represent poor markets for the Suisai product.

We estimate potential sales to the education market of 1000 in the first year and 500 in the second year.

Graphic Art

The Graphic Art market consists of all the advertising companies, the newspapers and the magazine companies.

The Graphic Art market is dominated by professionals who are familiar with most of the mainstream Graphics packages - Corel Creator, Adobe Photoshop, Corel Draw and other high-end packages. This group of people are not likely to be volume purchasers of Suisai because they will almost always have the ability to create almost any kind of graphic with the tools they have.

A large sub-segment within the graphic art market consists of photocopying shops and letterpress shops that produce low-end graphics for small businesses and for retail customers. These shops frequently produce menus, posters, leaflets and other advertising material. The Suisai product may require too much artistic effort but with the addition of a 'clip-art' library and some targeted examples this sub-segment may produce useful volumes.

We believe potential sales to this market will not exceed 1000 units.

Hobby Art

The hobby art market for amateur painters is fairly well developed in the UK. Painting is fairly popular and watercolour painting is regarded as a hobby for 'the older, well off middle classes'. Unfortunately very few of the 'older, well off middle classes' regard computers as an appropriate medium for producing art. There is possibly some room for the Suisai product in the educational classes attended by those people learning watercolour painting but most of these classes will use the same facilities as the schools there is no additional market.

Possible niche markets in the hobby segment include the teaching of painting to the disabled and to people in prisons and in hospitals. These niche markets are unlikely to produce significant sales volume but

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could serve as markets in which free software (and probably hardware) could gain useful publicity for NTT.

We believe that potential sales to the hobby art segment will be rather low, of the order 500 units.

Computer Hobbyist

Earlier in this report we have mentioned the vast number of magazines sold into the professional and hobby markets. Many of the buyers of these magazines are interested in some aspect of computing allied with games or with some professional or semi-professional interest in computers.

However, the typical computer hobbyist is male, aged 17 to 25 and we believe few are sufficiently interested in painting/graphics to pay for a watercolour painting package. We believe sales are not likely to exceed 1000 units.

Taking the sum of all the above market segments we get an estimated 5,200 unit sales in the first year.

Pricing

As in all markets, pricing is key. The market price for a painting package is dictated by the market leader - Microsoft FineArt at a retail price of £25 with other packages selling at about £16.99 and £9.99. We doubt that Suissai can attract a price premium and will have to retail at about £18.00 if any success in the market is to be achieved.

Assuming the retail price is set at £18.00 the overall volumes are determined by the market value figures estimated earlier. We estimate the accessible market values to be:

Business sector	£110,000
Leisure sector	£ 32,000
Total	£142,000

add
photo shop.

This suggests total volume sales/year of about 7,900 units. This is somewhat above the estimated sales volumes of 5,200 units but the agreement is sufficiently close to suggest our estimates are reasonably robust. The two figures represent optimistic and pessimistic estimates of market volumes and so for market sizing purposes we advise taking the mid point - 6,550 units.

Taking into account the typical margins for distribution

	Margin	Buy-in price	Selling-on price
Retailer	20 - 25%	£13.95	£18.00
or Mail order	15 - 20%	£13.62	£16.50
Distributor	10 - 15%£11.91	£13.62/13.95 depending on channel

PC Paint
Draw Mouse, PaintSPA.
Oct/Nov 95

Acom-
emulates DOS.

So the value to NTT will be approximately £89,000 less the cost of manufacture/packaging/administration assuming sales of 6,550 units.

Education Computing Technology 01895 022112

Training info network Ltd
Jubilee Hse

The Oats Rustip max
H447LF

based on estimate of £18

above Microsoft FineArt

• ability to paint with
brush
• mix colours.



*f100 to
made
by Genie
(Korean)*

4. Distribution methods

The distribution chain is well developed with over 10,000 PC and game software stores distributed across the UK and a well developed mail order channel through the many magazines. Some ordering also takes place through home catalogues.

Within the UK the method of distribution varies slightly between business software and leisure software, this is shown in the tables below:

Business software distribution

Specialist dealers	70%
Mail order	25%
High Street stores	5%

*Market assessment
Pp²*

Leisure software distribution

Specialist dealers	30%
Mail order	28%
Computer retailers	20%
High Street stores	22%

However, although the market is very large it is heavily dominated by game software, SOHO applications and educational/reference software. A recent inspection of a PC supermarket - PC World - which is owned by DIXONS, a major UK retailer, showed comparable painting packages displayed in two sections - Education and Home Office.

In the Educational section packages such as Microsoft FineArtist was offered at £25 whilst DoodleMation by Screen Magic was offered at £16.99. In the Home Office section packages such as Powerpoint were offered at £249, Adobe Personal at £300 and Astound at £189. At the bottom end of the market a simple painting package Art Shop was offered at £9.99.

The 'hot spot' in the business/home office section was reserved for 3D graphic and rendering packages where some 15 titles were displayed at prices ranging from £70 to £250.

The Suisai product would be regarded by the distribution chain as a simple commodity product with modest volume prospects. This means it would be distributed through a two tier distribution channel - a main or wholesale distributor and then into the retailer, mail order and Value Added Reseller markets before it was finally sold to the business or leisure sectors.

The UK wholesale market is serviced by the 'big three' distributors:-

Frontline

Ingram Micro

Merisel.

1. The first part of the paper is devoted to a discussion of the general principles of the theory of the structure of the human mind.

2. The second part of the paper is devoted to a discussion of the general principles of the theory of the structure of the human mind.

3. The third part of the paper is devoted to a discussion of the general principles of the theory of the structure of the human mind.

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11. The eleventh part of the paper is devoted to a discussion of the general principles of the theory of the structure of the human mind.

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13. The thirteenth part of the paper is devoted to a discussion of the general principles of the theory of the structure of the human mind.

14. The fourteenth part of the paper is devoted to a discussion of the general principles of the theory of the structure of the human mind.

15. The fifteenth part of the paper is devoted to a discussion of the general principles of the theory of the structure of the human mind.

16. The sixteenth part of the paper is devoted to a discussion of the general principles of the theory of the structure of the human mind.

17. The seventeenth part of the paper is devoted to a discussion of the general principles of the theory of the structure of the human mind.

18. The eighteenth part of the paper is devoted to a discussion of the general principles of the theory of the structure of the human mind.

The 'big three' distributors are primarily American and operate worldwide. If NTT gets into the software publishing business then it would be wise for NTT to develop a strategic relationship with these companies. You should also check whether you already have a relationship with these distributors.

For the modest volumes we envisage for the Suisai product the main retail outlets - W H Smith, Dixons and so on would not normally be interested in dealing directly with NTT, they would deal with the distributors instead.

The procedure for entering the distribution chain with Frontline, Ingram Micro and Merisel is fairly standardised. The procedure is as follows:

Establish contact with the distributor's Director of Product Marketing

Send details of the product (literature, prospective market, expected volumes, expected pricing and if requested to do so a sample of the product)

The distributor will review the product and decide whether it feels the product is worth marketing

If the distributor wishes to go ahead and carry the Suisai product then commercial arrangements for supply, product call-off rates, pricing policies and so on can be negotiated.

As an approximate guideline, the normal margins required by the distribution channel participants are:

Retailer	20 - 25%
Mail order	15 - 20%
Distributor	10 - 15%.

} interviewing
distributors on phone.

NTT should be very sensitive to the fact that the mainstream distributors we have mentioned are fussy about the products they choose. If they all refuse to distribute the product or demand excessive margins then the Suisai product has a big problem. Therefore it is important to develop a relationship with the Director of Marketing (or equivalent) within the chosen distributors.

You should make sure that NTT's approach to them is sensitive to the fast-moving, profit-oriented nature of their business. These companies are in a low-margin, high-volume business and are constantly being offered new products. They review all new products and take a hard-nosed view of the likely profits to be made from the offered product. One company we spoke to - Frontline - claimed not to be taking on any new products.



UK contacts:

Frontline Distribution Limited (David Clark - Director of Product Marketing)
Hampshire House
Basingstoke
Hampshire
RG24 8PL
Telephone: 01256 463344 or 01256 847880

Ingram Micro Limited (Justine Bowers)
Garamond Drive
Wymbush
Milton Keynes MK8 8DF
UK

Telephone: 01908 260160

Merisel Distribution Limited (Kate Tarry)
941 Great West Road
Brentford
Middlesex
TW8 9DD

Telephone: 0181 568 8866 or 0181 490 5000



5. Advertising and promotion issues

Because NTT and the Suisai product line is practically unknown to prospective purchasers it will be important to make a big 'splash' in the market when the product is introduced. One of the main ways to achieve good coverage is through the computer magazines, a good product review is essential to winning over the distribution channels as well as end users.

The importance of a good magazine review is emphasised by a comment from Roger Hipwell business unit manager at Computer Associates. He recently stated 'I believe we (the suppliers) are now in the fashion business, undergoing management by magazine'. The importance of this statement lies in the two phrases - 'fashion business' and 'management by magazine'.

The reference to the fashion business means that the market is volatile with many of the characteristics of the women's clothing industry - one month a style is 'in' and a few months later a different style is 'in'.

The reference to 'management by magazine' refers to the importance of good magazine reviews. In general magazine reviews are a superficial review of the impression a product has made on an industry 'guru'. It would be important to co-ordinate magazine reviews with the launch into the distribution channels. In fact we believe that the main distributors would be a valuable asset in helping you to select suitable magazines and gurus for a favourable review.

A strategic problem we believe NTT should consider carefully is the position of NTT as a PTT versus NTT's position as a software producer - particularly as a producer of 'low-end' and game software products. None of the European PTTs has made a success of the entries they have made into the commodity software markets and they now confine their efforts to system integration projects.

A related issue is the use of products like Suisai as demonstrations of NTT's skills in software and of NTT's skills as a system supplier. This means making Suisai available as 'freeware' or as part of a wider marketing package.

You also asked us to comment on the possibility of packaging the Suisai product with a Genius EasyPainter pen tablet. This pen product makes using the Suisai (or any other drawing/painting) package easier to use. We believe this will not improve sales of the Suisai product significantly and we believe the Suisai package may become discounted as a 'freeware' package to demonstrate the capabilities of the Genius tablet.



A Proposal for
the Conduct of a Marketing Research Study

for

INPUT

Market Opportunity for 'Suisai'

January 1996

Objectives and Scope

INPUT wants to conduct a marketing research study into the market opportunity for a PC 'painting' software product. The initial objective would be to assess the overall potential market size, both current and predicted, an assessment of who would buy the product and how buyers might be segmented for market targeting purposes. An important additional factor in assessing the potential market would be the relative popularity of Windows 3.1 versus Win95 amongst the potential client base.

A further objective of the research would be to analyse and describe potential distribution methods for the product.

The initial research would be restricted to the UK market.

Methodology

The project would commence with a kick-off meeting in order to confirm the project objectives and methodology and confirm the project timeline.

The consultant would then proceed to conduct field research to establish the current market environment for painting PC tools, how they are bought and who buys them (e.g. personal use, education etc.), in order to establish the volume of products distributed in the UK and the current pricing levels and other relevant data. It is envisaged that the principal research target would be the channels, whether PC superstores, mail order or high street retailers.

The consultant would then proceed to prepare the findings in a written report.



Timeline

A four week period is envisaged for the project in order to ensure sufficient time to evaluate the market potential fully and to prepare the results in a usable form by INPUT.

Professional Fees

£1,400

The professional fees for this research project would be £1,200 excluding any normal business expenses associated with the work.



Mr P Lines
INPUT Europe
Cornwall House
55-77 High Street
Slough
Berkshire
SL1 1DZ



Sparrows Cottage
Benover Road
Yalding
Maidstone
Kent ME18 6AZ
Tel: 01892 730646
Fax: 01892 730665

29th February 1996

Dear Peter

Please find enclosed my invoice for the consulting work on the NTT 'Suisai' job. I thought you had produced a pretty impressive report and done a good job for NTT.

The wider issue of a real marketing strategy for software production (or not) is obviously a big question and opportunity but I am not sure the local folk at NTT London are the right ones to address this problem to.

I have included the one day hanging over from the Internet job on this invoice - I hope that keeps your bookwork simple.

Anyway, an interesting job, thanks.

With best wishes

Roger Hart



INPUT

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☐ MAIL LIST - SEE BACK

CONTACT REPORT

Non Client/Prospect File: ☐ Media ☐ Financial ☐ Other _____

INPUT

Staff: Init. BF Init. _____ ☐ INPUT office ☐ Client Office ☐ Other 28Contact Date: 10/1/96Date Written: 10/1/96

Company	<u>NTT DATA</u>			DISTRIBUTION:		Prog./Proj. ID
	Action	Info.	By	When	Describe Action-F/U	
Name	<u>MASAKI MUROTA</u>					
Title	<u>Mr. MUROTA.....</u>					<u>DIGITIZER</u>
Address						<u>English version.....</u>
Phone: (0171) 374 - 0540						
Fax: () - 2275						

① YES TO CUSTOM (SUSAI) AT RISK

② NEXT FISCAL (APRIL →) WILL NEED

TO DO DETAILED ANALYSIS OF
MULTI-MEDIA..... after April.....COMPANIES INVOLVED IN ELECTRONIC COMMERCE
eg. DIGICASH, CYBERCASHNEEDS TO KNOW BUDGETARY ESTIMATE
FOR COST OF THIS.

PETER PLEASE CALL 10 or 11 JAN

a) KICK OFF CUSTOM

b) DISCUSS ②

☐ Continued over



CONTACT REPORT

Non Client/Prospect File: ☐ Media ☐ Financial ☐ Other _____

INPUT

Staff: Init. BF Init. _____ ☐ INPUT office ☒ Client Office ☐ Other _____Contact Date: 15/12/95Date Written: 20/12/95

Company	<u>NTC DATA</u>	DISTRIBUTION:		Prog./Proj. ID
		Action	Info.	Describe Action-F/U
Name	<u>E. NAKAMURA</u>	<u>PL</u>		<u>Custom Proposal</u>
Title	<u>GEN. MGR.</u>		<u>22-12-95</u>	
Address				
Phone: ()				
Fax: ()				

ALSO NAKAMURAMEETING TO DISCUSS POSSIBLE CUSTOM PROJECT FOR LARCH (ON NST) OF 'SUSAI' PACKAGE.CURRENTLY AVAILABLE IN JAPAN ONLYRETAIL PRICE approx £80 or £123 with pen/tablet
SRA will sell 700 copies in first year.Now need to decide whether to sell in UK / EUROPE(beginning April 96 if MR is +ve - but not expecting huge sales)Two Phase Market Research ProjectPhase A completed by end Jan 96B .. by end March 96 (+payed for)Japan market is 10% Education 90% Personal/Hobby
(4 or 5 Distribution Channels)Currently runs on WIN 3.1 (next version is WIN 95 mid 96)UNIVERS? - colour mixingSee attached spec.nb. discussed name - suggested they change it!☐ Continued over





NTT DATA
COMMUNICATIONS SYSTEMS
CORPORATION

UK Branch
5th Floor, 30/34 Moorgate,
London EC2R 6DN U.K.
Telephone: 071 - 374 - 0040
Facsimile: 071 - 374 - 2275

Marketing Research for "Suisai"

1. Background

NTT Data Communications Systems Corporation(NTT DATA) has developed a software product named "Suisai"(a Japanese word meaning "water color").

The product runs on Windows 3.1, enabling users to enjoy water color painting on personal computers.

In Japan approximately 5,000 copies were sold in less than a year. The product is a complete packaged program, without the need for any customization and has been developed to comprise of universal software, which means that it has the potential to prevail in the European software market. Its English version will be available by the end of 1995. We are planning to develop a version that runs on Windows 95 if there is significant market not only in the UK but also in the other European countries.

Phase A for UK only ?

NTT DATA UK Branch is considering selling the English version product in the UK. Although we would like to conduct market research, we do not have sufficient knowledge and resources. Therefore, we are looking for an advisor who has knowledge and experience of PC software marketing.



2. Research Item

A. Analysis of market opportunity

A-1 Market Opportunity for Suisai

- ① Market segmentation (Who will buy the product?)
- ② Potential market size (current and predicted figures)
- ③ Popularity of Windows 3.1 and Windows 95
(current state and forecast)
- ④ Distribution methods (How can we organize the distribution?)

A-2 Research of competitive products

- ① Comparison of functions and features
- ② Price
- ③ Developer, distributor
- ④ Marketing strategy
- ⑤ Market share

B. Suggested marketing strategy for Suisai

B-1 Pricing

B-2 Marketing

- ① Distribution channel
- ② Appropriate marketing approach

B-3 Budget for item B-2



3. Research Term and other conditions

Approximately 1 month from the date started for the research of
Item A

Approximately 1 and 1/2 months from the date started for the research
of Item B

We would like to have an interim report after Item A is completed,
and discuss if further research is required. We will reserve the right
to cancel further research unless the market opportunity justifies it.

4. Contact

Mr. Masaki Murota, Manager, NTT DATA UK Branch
5th Floor 30-34 Moorgate London, EC2R 6DN
Phone: (0171) 374-0040 , Fax: (0171) 374-2275



Fig. 1. Relationship between the number of fish (N) and the number of fish per square meter (n). The number of fish per square meter (n) is a function of the number of fish (N).



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Peter
Free for Custom.
Brian.

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NO. quote for (A) only at first

Timescale - complete A by end Jan ?

B by end March



[Suisai] 2.0 for Windows

User's Manual

NTT Data Communications Systems Corporation



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NTT Data Communications Systems Corporation
Suisai Support Centre
Toyosu Centre Building, 3-3-3 Toyosu, Koto-ku, Tokyo 135
Tel: 03 (5546) 2465 Fax: 03 (5546) 8348

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- What is [Suisai Art Live]?
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- Installation procedure
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- Canvas size

- Creating a Toolbox

- Creating paints

- Creating patterns



INTRODUCTION



What is [Suisai]?

Welcome to the graphic art software, [Suisai].

[Suisai] is a new type of computer graphic software which simulates the sensation and process of painting in watercolours using a new tool, the computer, instead of paints. An electronic pen and icons make it easy, even for children or elderly people who have never used a computer before, to experience painting in watercolours.

- * The [Brush] can be altered to give whatever effect you like
You can set the shape of [Brush], size, amount of colour and quality together with the amount of water and paint on the [Brush]. These settings can be used to effectively create the subtle effects in watercolours (fading and blurring).

- * Any colour you like can be created with the Palette
[Paints] can be mixed on the [Palette] to create any colour you like. This follows exactly the same concept as in conventional watercolour painting.

- * Use the [Pencil] to draw an outline
The [Pencil] and [Eraser] can be used to draw the outline for your watercolour painting. The [Pencil] comes in three thicknesses and three darknesses. The quality of the Paint (transparent or not transparent) can be changed to allow the outline to be visible or not when the paint is applied.

- * A wide variety of painting tools are available
Basic geometrical forms can be drawn using either the [Brush] or [Pencil]. The [Spray] or [Airbrush] can also be used to create various effects.

- * Edit pictures as you wish
Parts of the picture you have drawn can be copied, moved, reduced or enlarged. Also, the [Magnifier] (giving an enlarged display) can be used for detailed work

- * Easy interface
Using the electronic pen allows you to draw a picture in exactly the same way as with an ordinary pen. The [Suisai Set] also comes in two sizes (large or small) to suit the person using it.

- * Create your own personal [Suisai Set]
You can create your very own [Suisai Set] by setting only those [Tools] you want to use in the [Toolbox]



What is [Suisai Art Live]?

[Suisai Art Live] is the title of a multi-media CD-ROM incorporating a process for artists to create paintings using [Suisai].

You can listen to BGM and enjoy the creative sense of being an artist at the same time.

A number of different outlines which can be used with [Suisai] are also included.

See Chapter 2 [Reproducing Suisai Art Live] for instructions on how to operate [Suisai Art Live].

System configuration

- (A) Personal Computer
- (B) Colour printer
- (C) Electronic pen
- (D) Tablet

* A mouse may also be used instead of the electronic pen.

Box contents

The [Suisai] 2.0 box contains the following. Please check that nothing is missing before proceeding any further.

- * 2 Suisai system disks (3.5 inch 2HD)
- * Disk 1.....Containing the [Suisai] program
- * Disk 2.....Containing a selection of sample pictures
- * 1 Suisai Art Live (CD-ROM)
Containing [Suisai Art Live] and a selection of outlines
- * 1 User's Manual (this manual)
- * 1 User's Registration Card

User Registration

Please fill in the User Registration Card included with this product and return it to us. We will then provide upgrades of [Suisai] for you and give you the latest information on new products.

Please note that customers who fail to return their Registration Card may not be entitled to technical support or our version-upgrading service.



How to use this manual

This manual is set out as follows and is designed for users with some knowledge of operating Windows. Please see your Windows manual or reference guide on how to operate Windows.

Chapter 1 Setting up Suisai

Explains the operating environment required to use Suisai and how to install the software. Make sure you read this chapter when you use [Suisai] for the first time.

Chapter 2 Using Suisai

Gives a basic explanation of how to use [Suisai]. Carry out the steps described in the text to get an overall understanding of [Suisai].

Chapter 3 Various functions

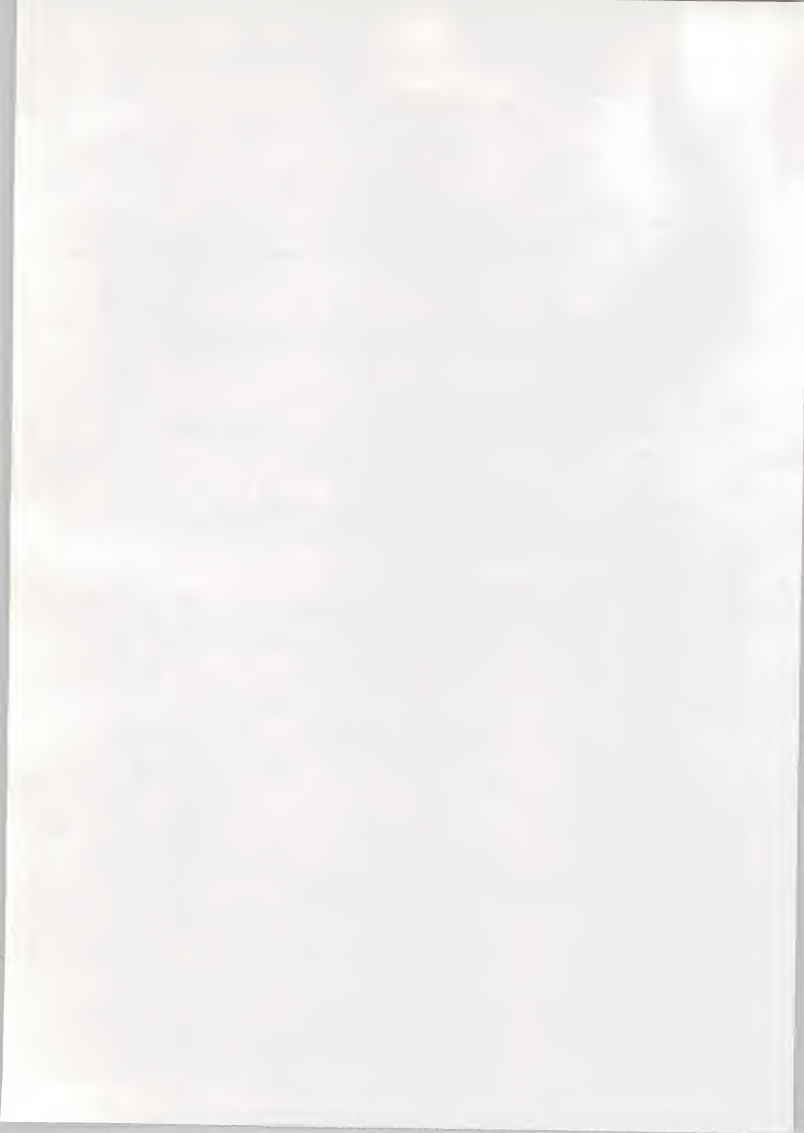
Explains all the different functions that can be used with [Suisai]. Each function is explained separately and can therefore be referred to if you do not fully understand any function.

Input by electronic pen or mouse

Suisai can be used either with an electronic pen or mouse but, as a rule, this manual refers to input by electronic pen. If you use Suisai with a mouse you should therefore replace certain passages in the manual as shown below.

Input device used	How to use	
Electronic pen switch halfway (as in the manual) pen	Press the tip of the pen lightly	Press the down the
Mouse right-hand	Click the left-hand button	Click the button

How to use Help



[Suisai] has a Help function which allows you to read a simple explanation on the screen. To use the Help function, start [Suisai], choose [Help] on the Menu Bar and then choose the Sub-menu [Contents].

CHAPTER 1

STARTING UP SUISAI



INSTALLATION PROCEDURE

What you need to set up Suisai

The following environment (hardware and software) is required to use Suisai.

The customer must have those items marked o .

The customer may need those items marked ^ .

o Personal Computer

A Personal Computer with a CPU of I486 or more on which MS-Windows Version 3.1 will operate

(a computer with a CPU of i486DX2/66MHz or more is recommended for optimum performance)

Capable of displaying more than 65536 colours

(Even when the PC alone cannot display this many colours, it may be possible to do so using a graphic accelerator board)

o OS

MS-Windows Ver.3.1

(Only compatible with Windows in enhanced mode)

o Memory

4MB or more

(8MB or more is recommended for optimum performance)

o Disk Drive

3.5 inch floppy disk drive

Hard disk

(Needs 2MB or more of free space if only the program is installed and 6MB or more of free space if sample data is also installed)

CD-ROM drive

(needed when using Suisai Art Live)

o Display

Resolution: 640 x 400, 640 x 480, 800 x 600, 1024 x 768

Colours displayed: Must be capable of displaying 65536 colours



o Mouse or electronic pen (one or the other is needed)
Microsoft mouse or any Microsoft compatible mouse
Electronic pen for use with Windows Ver.3

^ Colour printer
Colour printer for use with Windows Ver.3

How to install Suisai

To install Suisai:

1. Insert Disk 1 into the floppy disk drive.
2. Start File Manager in the Windows Main Group.
3. Select the drive containing Disk 1 to display the contents of the disk

File Manager

File(F) Disk(D) Directory(I) View(V) Options(O) Window(W)
Help(H)

Select 1 File(14,944 bytes)
(996,203 bytes)

No. of Files: 17

4. Double-click [setup.exe.] to display the set-up screen for Suisai.
5. Indicate the name of the directory and that of the drive in which [Suisai] is to be installed. Select [Continue] if the drive and directory indicated are correct.

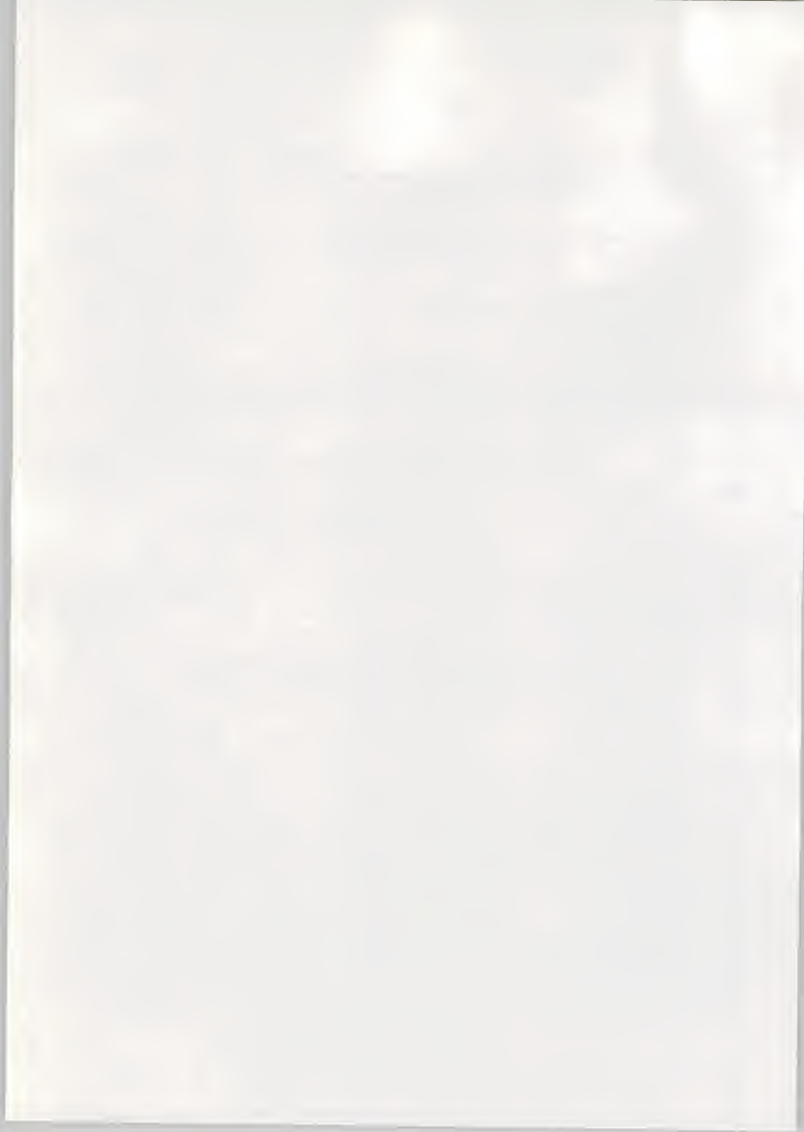
Suisai 2.0 Set-up

Installing Suisai 2.0

Creating a directory for Suisai 2.0 under the following name
Please amend if installing in a different drive or directory

To be installed in: A:YSUIWIN
Continue(C) Interrupt Set-up(L)

6. Indicate whether the selection of sample pictures for Suisai is to be installed or not. Select [Yes] if it is and [No] if not.



7. Installation of [Suisai] commences. When installation is over a screen confirming that it has been installed will be displayed. To complete installation, select [OK].

Before starting Suisai make sure you read the [readme.txt] file. It contains information which does not appear in this manual.

BASIC OPERATION

How to start Suisai

Have you finished installing?
You have? Then now we can start [Suisai].

The [Suisai icon], which looks like the picture on the right, should be displayed on the screen.

The title will be displayed and the following painting screen will appear when you double-click the [Suisai icon].

- (A) Suisai
- (B) Suisai 2.0
- (C) The Suisai icon

Suisai - Untitled 1

File(F) Edit(E) View(V) Options(O) Window(W) Help(H)

Untitled 1

- (D) Menu bar
- (E) Suisai Set
- (F) Tools
- (G) Toolbox
- (H) Canvas

How to operate Suisai



* The electronic pen

The electronic pen has two switches: one on its tip and another halfway down the pen. The switch on the tip of the pen is used when painting or selecting [Suisai]'s various functions.

The switch halfway down the pen is used when removing the [Suisai Set] from the screen or stopping a function which is in progress.

* Opening a new canvas

Opens a new canvas for you to draw on. Position the cursor on [File] on the Menu Bar at the top of the screen and press the tip of the pen lightly. The colour of [File] will be inverted and a sub-menu will be displayed. (Choose [New] on the sub-menu to display a new canvas on the screen)

* Moving the cursor (the arrow on the screen)

The arrow on the screen is called the cursor. It can be moved by touching the tablet lightly with the tip of the pen and moving it around.

* Moving the Suisai Set

Move the cursor to the bar at the top of the [Suisai Set] using the electronic pen. Drag the pen with its tip pressed down lightly to move the [Suisai Set] wherever you want with the bar.

* Selecting the Tool you want to use

Move the cursor over the [Tool] you want to use and press the tip of the pen down lightly to select that [Tool]. The colour of the [Tool] selected will be inverted and it can then be used.

How to exit

Position the cursor on [File] on the Menu bar and press the tip of the pen lightly. The colour of [File] will then be inverted and a sub-menu will be displayed. Move the cursor to [Exit Suisai] at the bottom of the sub-menu and press the tip of the pen lightly. You will then exit Suisai and the screen will revert to the Windows screen when starting up.

When a picture has not been saved before, a dialog box asking whether to save it or not will be displayed. Choose [Yes] if you want to save it and [No] if not.



CHAPTER 2
USING SUIAI



DISPLAYING PICTURES

Calling up a file

First of all we are going to call up a sample picture.

Move the cursor to [File] on the Menu Bar and press the tip of the pen lightly to display a sub-menu. Then move the cursor to [Open] and press the tip of the pen to display the following screen.

Now we are going to call up [flower.bmp]. Choose [flower.bmp] from the list of files and then select [OK].

		Opening a File	
File name(N)	Directory(D)		OK
			Cancel

Type of file(T):	Drive(V):
------------------	-----------

Suisai - FLOWER.BMP					
File(F)	Edit(E)	View(V)	Options(O)	Window(W)	Help(H)



[Suisai] can be used with TGA (Targa) format and TIFF format (compressed or uncompressed) as well as BMP format. When files in these formats are being called up, the file format should be indicated in [Type of File].

PLAYING BACK [SUISAI ART LIVE]

How to play back [Suisai Art Live]

[Suisai Art Live] incorporates a process for artists to create paintings using [Suisai].

[Suisai Art Live] incorporates music together with a number of different features ranging from pencil sketches to basic watercolour effects. It can be used for either pleasure or educational purposes or as part of the manual for [Suisai].

(Your CD-ROM card contains details of titles)

Now we are going to start [Suisai Art Live].

Starting up [Suisai Art Live]

1. Check that the CD audio driver is fitted for Windows. The instruction book for your CD-ROM drive will explain how to fit the driver and set it.
2. Start up [File Manager] in the Windows Main Group.
3. Select the CD-ROM drive to display the contents of the disk.
4. Double-click [artlive.exe] in the [suiwin] directory.
5. The screen below will be displayed

Suisai Art Live

Titles:

Animal soccer
Animal puzzle
Ostrich running
Children at sunset
A town is built
Tictac
Dream
Christmas
Searching

Play back Exit

Set program

Play back mode

All titles

Selected titles



Old person

Classic car

Landscape

Fish

Girl

Outer Space

Flowers in a vase

Program

Repeat play back

When [Repeat play back] is chosen, play back will be repeated in the appropriate modes.

Different ways of playing back

[Play back all titles]

Select [Play back] with the play back mode in [All titles]. All the titles will then be played back in turn starting with [Animal soccer]. Press the [F2] key on the keyboard if you want to stop during play back.

[Play back selected titles]

Plays back selected titles. Choose the title you want to play back from the list and then select [Play back].

[Program play back]

Plays back titles in the order in which they have been indicated.

1. You can decide the order in which to reproduce titles. Select [Program setting]. The following screen will then appear.

	Program setting	Program:
Titles:		
Animal soccer		
Animal puzzle		
Ostrich running	Program > >	
Children at sunset		
A town is built		
Tictac	Delete	
Dream		
Christmas	Reset	
Searching		
Old person		
Classic car		

OK Cancel



2. Choose the title you want to play back first from the list of titles. The colour of that title will then be inverted.
3. Select [Program > >]. The title chosen will then be displayed on the Program List.
4. This completes selection of the first title to be played back. Repeat the process to enable you to select the next title to be played back and so on.
5. Once all the titles to be played back have been chosen, select [OK]. To commence play back, choose [Play back] on the initial screen.

If you want to clear any titles that have been selected, choose the titles you want to delete from the program list and then select [Delete].
To clear all the titles that have been programmed, select [Reset].

PAINTING A PICTURE

Creating an outline

First of all we are going to draw an outline to work from with the [Pencil]. Any unwanted lines etc. can be removed with the [Eraser].

[Pencil].....P.

[Eraser].....P.

The picture is going to be of a boy frolicking in the sea with a dolphin and fish. Select [Pencil] and draw the dolphin and the boy. Then draw some fish swimming nearby.

Painting and adding colour

Replace the [Pencil] with the [Brush] to paint in the outline.

Once you have decided on the [Brush shape], [Amount of paint] and [Amount of water], make the colours you want on the Palette with the paints and paint in the dolphin, the boy and the fish.
For a large area like the sea you can also use the [Bucket] icon to pour in colour.

[Brush shape].....P.

[Amount of paint].....P.

[Amount of water].....P.

[Brush].....P.

[Bucket].....P.

Adjusting the balance

Now we are going to adjust the overall balance of the picture using the special features found on a computer.



Make the picture more interesting by moving the fish in the background around with [Enclose] and adding more fish with [Copy].

[Enclose].....P.

[Copy].....P.

The overall balance of the picture can also be adjusted by adding more fish and making them different sizes with [Enlarge] and [Reduce].

[Enlarge].....P.

[Reduce].....P.

Using the Tools

Now we are going to make the sea look multi-coloured by adding a number of different colours.

Finally, the details will be carefully coloured in and touched up. The Magnifier is used to do this. [Shading] can also be used to give an impression of size and make the fish appear closer or further away.

[Magnifier].....P.

[Shading].....P.

Why don't you experiment with your own way of creating effects using the graphic art software, Suisai?



CHAPTER 3
VARIOUS FUNCTIONS



THE SUISAI SET FUNCTIONS

List of Tools

(A) Permanent or Fade

You can choose between [Permanent] paints (on the left) and [Fade] paints (on the right)

(B) Transparent or not transparent

You can choose between [Transparent] paints (on the left) and [Not transparent] paints (on the right)

(C) Palette

Enables colours to be mixed together.

(D) Paints

24 basic colours are provided

(E) Storage areas for colours

Colours made on the Palette are stored here.

(F) Brush colour

Displays the brush colour

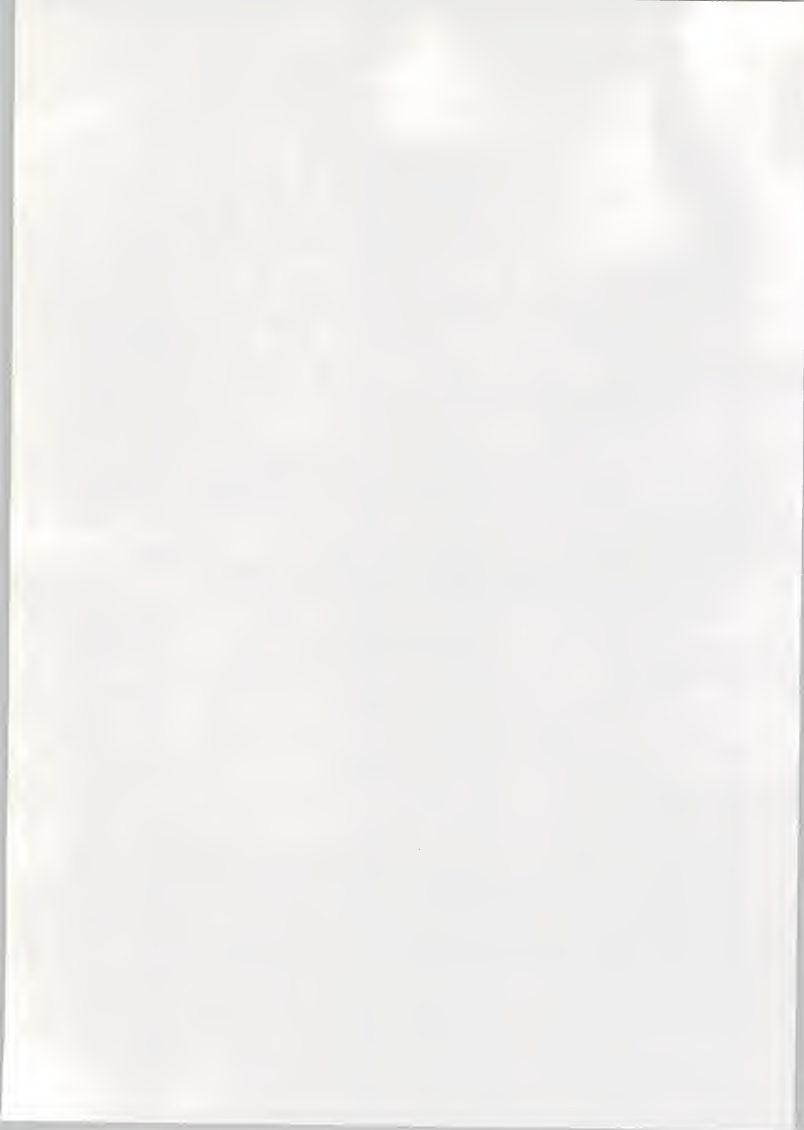
(G) Brush shape

Enables the shape and size of the tip of the Brush to be altered. The colour displayed is that on the Brush.

(H) Washing the Brush

Enables the Brush to be washed

(I) Type of Brush



Enables the type of Brush to be altered.

(J) Amount of paint

Enables the amount of paint on the Brush to be altered.

(K) Amount of water

Enables the amount of water on the Brush to be altered.

(L) Siphon

Enables colour to be removed from anywhere on the screen on the tip of the Brush

(M) Storing colours

Enables frequently used colours to be stored on the Palette.

(N) Washing the palette

Enables the Palette to be washed clean.



Brush, Pencil, Tools

Brush	The Brush is used for painting
Pencil	For drawing outlines
Eraser	For removing any parts of the picture not wanted
Magnifier	For enlarging sections of the picture and making detailed modifications.
Enclose	For selecting square-shaped areas.
Lasso	For selecting areas of any shape.

Graphic Form Tools

Circle	For drawing circles
Straight line	For drawing straight lines
Square	For drawing squares
Curved line	For drawing curved lines

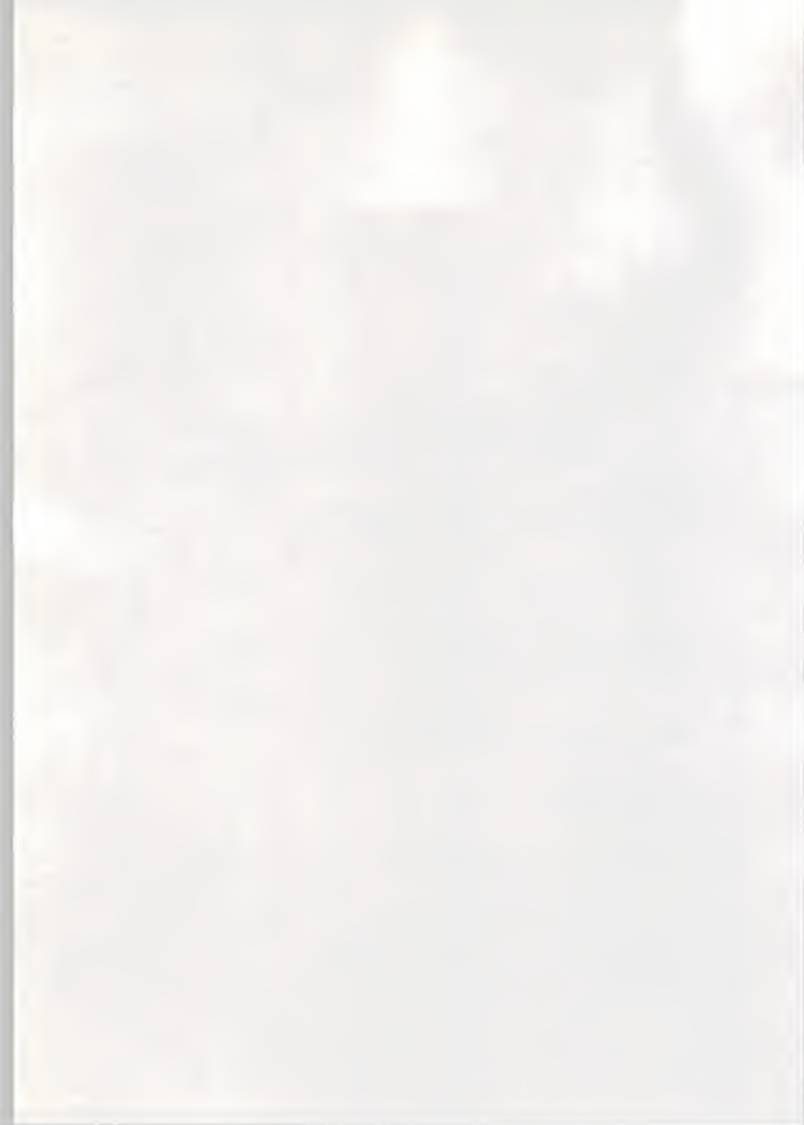
(A) Size of Suisai Set
For changing the size of the Suisai Set

(B) Canvas colour
For changing the colour of the canvas

(C) Cancel (Undo)
For canceling the last action taken.

Painting Tools

Spray
For dispelling colour in the same way as a spray
Air-brush
For dispelling colour in the same way as an air-brush



Shading

For shading the picture as if it had been spattered with water

Blurring

For creating a blurred impression

Bucket

For filling in an area with paint in a chosen colour

Stamp

For filling in an area with a chosen pattern.

Editing Tools

Copy	For copying
Reduce	For making smaller copies
Enlarge	For making larger copies
Cut	For deleting

How to use Paints

Paints

1. Pick a colour by pressing the tip of the pen lightly at the colour [Paint] you want. The [Paints] come in 24 basic colours and you can change the colours and line-up of the [Paints] as you like. (P.)

Transparent or not transparent

1. When [Transparent] (on the left) is chosen the paint is made transparent allowing the outline in [Pencil] to show through even when it is painted over.
2. When [Not transparent] (on the right) is chosen the paint is made non-transparent so that the outline underneath does not show through.

Permanent or Fade

1. When [Permanent] (on the left) is chosen the [Paint] will not fade even when used continuously.
2. When [Fade] (on the right) is chosen the [Paint] gradually fades as it is used up.

How to use the brush

The Brush

1. Select [Brush]
2. To apply colour to the canvas, select the colour you want from the [Paints] or [Palette], position the cursor on the canvas and drag it with the tip of the pen pressed down lightly.



The colour on the [Brush] will be displayed in [Brush shape] and [Brush colour] above it.

Brush shape

1. If you position the cursor on [Brush shape] and drag it with the tip of the pen pressed down lightly, a square frame will be displayed and the size and shape of the [Brush] will change.

The [Brush shape] will change to the round shape inscribed in the square frame displayed.

Washing the Brush

1. The [Brush] can be washed by selecting [Washing the brush] This removes all the paint on the [Brush].

Type of Brush

1. This changes the [Brush shape] from round to flat, and vice versa. The new shape will also appear in [Brush shape]

Amount of Paint

1. When the [] at the top is pressed lightly with the tip of the pen, the amount of paint on the [Brush] increases by one unit and when the [] at the bottom is pressed, the amount of paint decreases by one unit. The amount of paint is shown on a red bar graph in three units of strength.

Amount of water

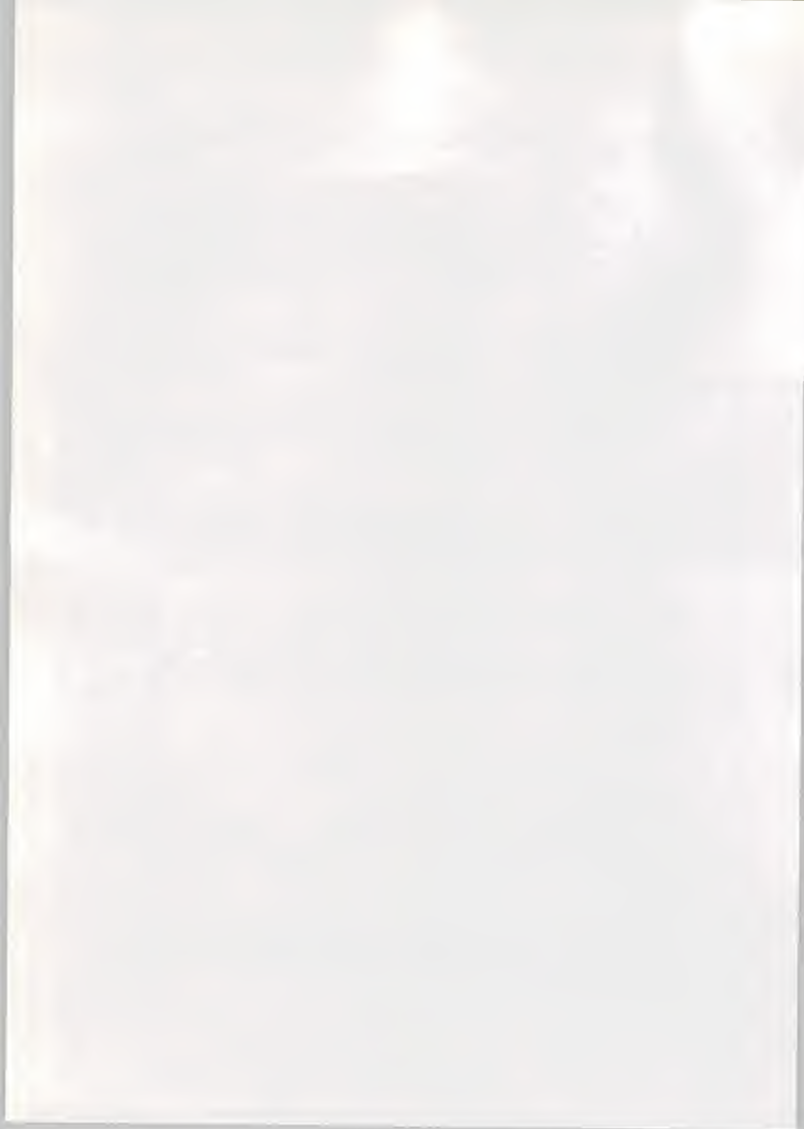
1. When the [] at the top is pressed lightly with the tip of the pen, the amount of water on the [Brush] increases by one unit and when the [] at the bottom is pressed the amount of water decreases by one unit. The amount of water is shown on a blue bar graph in three units of strength.

Palette

1. Select [Brush]
2. Pick the colour you want to use from the [Paints]
3. To put a [Paint] into the [Palette], move the cursor onto the [Palette] and press the tip of the pen lightly,
4. When you put a number of different colours onto the [Palette] and drag them around with the tip of the pen pressed lightly, the [Paint] colours can be mixed together and produce many different colours on the [Palette].

Siphon

1. Select [Siphon]
2. Move the cursor on the screen to wherever you want to remove colour from and lightly press the tip of the pen to enable colour to be removed on the [Brush]. You can remove colour from anywhere, including the [Suisai Set], with the [Siphon].



Storing colours

1. Put the colour you want to save on the [Palette] onto the [Brush]
2. Select [Storing colours] and choose one of the five [Storage areas for colours] to the right of the [Palette]. The colour which has been stored can then be used in the same way as a [Paint].
3. The colour stored will remain even when the [Palette] is washed.

Washing the Palette

1. The [Palette] can be washed by selecting [Washing the Palette]. This gets rid of all the colours made on the [Palette] so any colours you want to keep should be saved before washing the [Palette].

How to use the Pencil

The Pencil

1. Select [Pencil]
2. Place the cursor on the canvas and drag the pen around with the tip pressed down lightly to draw an outline.

When you select [Pencil] the left-hand side of the [Suisai Set] will change as shown in the diagram below on the right.

The thickness of the Pencil

1. To alter the [Pencil thickness], position the cursor on the thickness you want and press the tip of the pen lightly. A check mark will appear to the left of the thickness you have chosen.

The darkness of the Pencil

1. To alter the [Pencil darkness], position the cursor on the darkness you want and press the tip of the pen lightly.

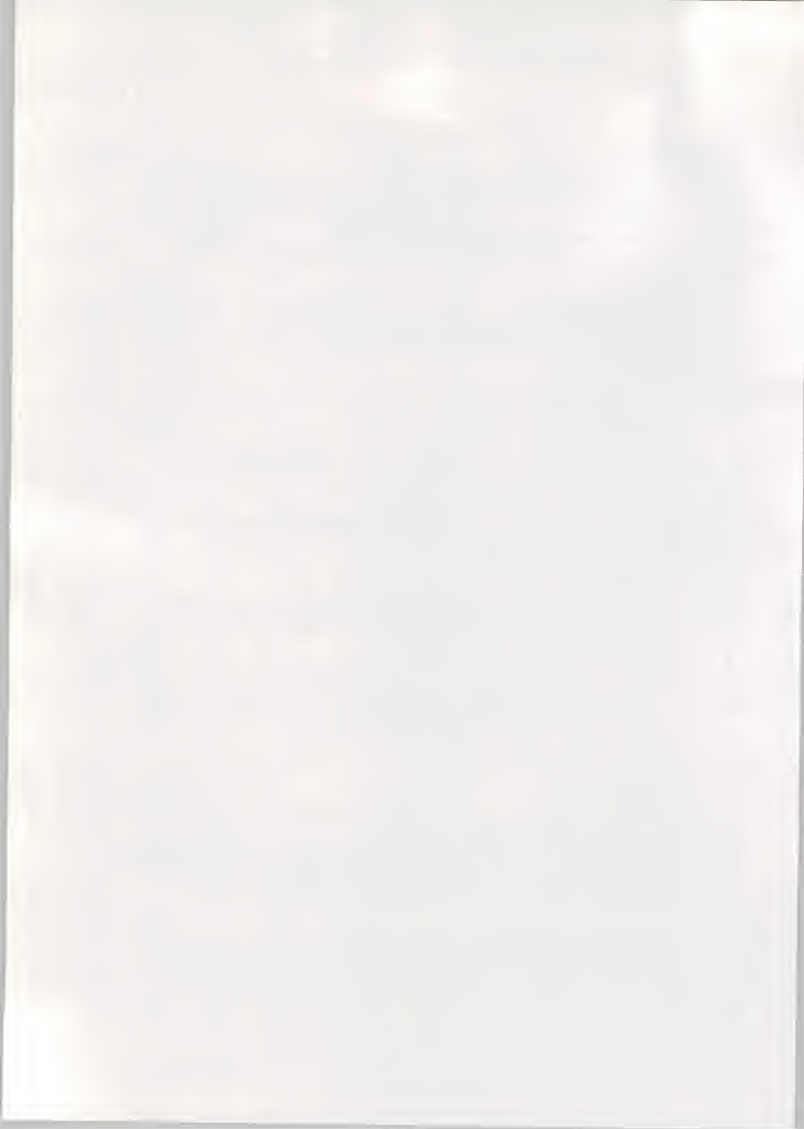
How to use the Tools

The Eraser

1. Select [Eraser]
2. When you select [Eraser] the left-hand side of the [Suisai Set] will change as shown in the diagram on the right.
3. Place the cursor on whatever you want to erase and drag the pen with the tip pressed down lightly for the picture to disappear and take on the colour of the canvas.

Size of Eraser (shape)

1. Position the cursor on the size you want and lightly press the tip of the pen to change the [Size of Eraser]
2. A check mark will appear to the left of the size you have chosen



Eraser mode

1. To change the [Eraser mode], position the cursor on whichever of the three modes you want to set: Erase [Pencil] only, Erase [Paint] only or Erase both [Pencil] and [Paint]; and press the tip of the pen lightly.

Magnifier

1. Select [Magnifier]
2. Place the cursor on a point in a corner of the area you want to enlarge and press the tip of the pen lightly to fix the starting point.
3. With the tip of the pen pressed down, drag the cursor in a diagonal direction. A square frame will then be displayed. Release the tip of the pen once the area you want to enlarge has been enclosed.
4. The frame will be in the form of a dotted line and another frame four times larger will be displayed around it
5. The further outside the enlarged frame you move the cursor the more the greater the degree of enlargement will be.
6. When it is the size you want, press the tip of the pen lightly again to fix the size and the enlarged picture will be displayed in a separate window. Make any amendments on this screen. Select [Exit] to close the window when you have finished making any amendments.

(A) Exit

* Only regular square-shaped areas can be enlarged and they can be enlarged to four, nine and sixteen times their normal size.

* You can use any function other than [Canvas Colour] on the [Magnifier] window but you can only draw inside the window.

Enclose

1. Select [Enclose]
2. Place the cursor on a point in a corner of the area you want to move/copy onto the Clipboard * and press the tip of the pen lightly.
3. With the tip of the pen pressed down, drag the cursor in a diagonal direction. A square frame will then be displayed. Release the tip of the pen once the area you want to select is enclosed.
4. (To move) Place the cursor inside the frame and drag it with the tip of the pen pressed down, releasing it where you want the selection to go. Press the tip of the pen lightly outside the frame to fix the new location. You can move a selection any number of times while the frame is displayed.

(To copy onto the Clipboard) Use [Edit] on the Menu Bar to cut or copy onto the Clipboard.



- * The Clipboard is a temporary storage area

The Lasso

1. Select [Lasso]
2. Enclose the area you want to move or copy onto the Clipboard with the tip of the pen pressed down lightly. The line traced by the tip of the pen will be displayed. Once the line traced by the pen has formed the shape you want, release the tip of the pen.
3. (To move) Place the cursor inside the frame and drag it with the tip of the pen pressed down, releasing it where you want the selection to go. Press the tip of the pen outside the frame to fix the new location. You can move a selection any number of times while the frame is displayed.

(To copy onto the Clipboard) Use [Edit] on the Menu bar to cut or copy onto the Clipboard.

How to use the Painting Tools

The Spray

1. Select [Spray]
2. To dispel colour in the same way as a spray, place the cursor on the canvas and move it with the tip of the pen pressed down lightly. The colour of the Spray will be the same as the [Brush colour].

The Air-brush

1. Select [Air-brush]
2. To dispel colour in the same way as an air-brush, place the cursor on the canvas and keep the tip of the pen lightly pressed down. The colour of the Air-brush will be the same as the [Brush colour] and the longer you keep the tip of the pen pressed down, the further out it will spread.

Shading

1. Select [Shading]
2. Place the cursor where you want to shade and move it with the tip of the pen pressed down lightly to shade the picture as if it had been spattered with water. This function is not affected by the [Brush colour].

Blurring

1. Select [Blurring]
2. Place the cursor on the canvas and press the tip of the pen lightly to create a blurred impression in the [Brush colour].

Bucket

1. Select [Bucket]



2. Place the cursor inside a solid expanse of the same colour and press the tip of the pen lightly.
3. The [Brush colour] will be put in at the point indicated.
4. The size of the area covered will depend on the [Amount of paint] on the [Brush]. When the [Amount of paint] is 1 anywhere in the same colour as that indicated will be selected, when it is 2 similar colours will also be included, and when it is 3 even more colours will be perceived as the same colour.

The Stamp

1. Select [Stamp]. Ten different patterns will appear in a window. Select one of the patterns.

	Pattern Selection	Exit
Select a pattern		

2. Place the cursor inside a solid expanse of the same colour and press the tip of the pen lightly.
3. The pattern selected will be inserted at the point indicated in the [Brush colour].
4. Close the window by selecting [Exit]

How to use the Graphic Form Tools

Square

1. Select [Square]
2. Place the cursor at a point in a corner of the square you want to draw and press the tip of the pen lightly to fix the starting point.
3. With the tip of the pen pressed down, drag the cursor in a diagonal direction. A square frame will then be displayed. When you release the tip of the pen once the frame is the shape you want, a square will be drawn.

* Either the [Brush] or [Pencil] can be used

Straight Line

1. Select [Straight line]
2. Place the cursor where you want the line to start and press the tip of the pen lightly.



3. With the tip of the pen pressed down lightly, drag the cursor to the end of the line. A thin line will then be displayed going from the starting point in the direction of the cursor. When you release the tip of the pen once the line is the length you want, a straight line will be drawn (aligned to a square frame??).

* Either the [Brush] or [Pencil] can be used

Circle

1. Select [Circle]

2. Place the cursor in the centre of where you want the circle to be and press the tip of the pen lightly to fix the centre point of the circle.

3. Move the cursor with the tip of the pen pressed down. A circular frame will then be displayed. When you release the tip of the pen once the frame has formed the shape you want, a circle will be drawn.

* Either the [Brush] or [Pencil] can be used

Curved line

A number of points are joined up to form a gently curving line.

1. Select [Curved line]

2. Move the cursor to where you want the curved line to start and press the tip of the pen lightly.

3. Position the cursor where you want the second point to be (release the tip of the pen before moving) and press the tip of the pen again. A thin line will be displayed.

4. Carry on, positioning the cursor where you want the third point to be and, when the shape you want is formed, press the tip of the pen lightly. A curved line will then appear joining the first and second points and a continuous curved line can be drawn by repeating this operation*

5. To complete the curved line, either press the switch halfway down the pen or press the tip of the pen close to the last point.

* Either the [Brush] or [Pencil] can be used

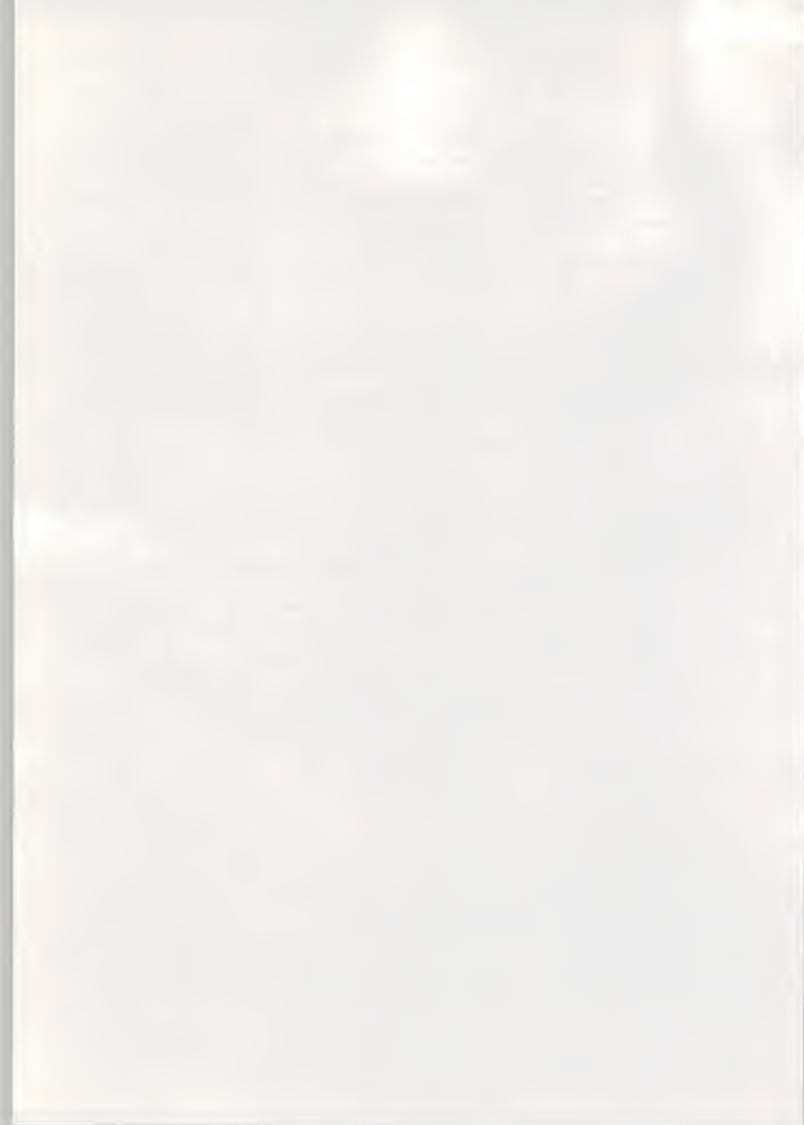
How to use the Editing Tools

Copy

1. Select [Copy]

2. When you want to copy a square area, select [Enclose], and when you want to copy any other shape, select [Lasso]

3. (When using [Enclose]) Place the cursor at a point in a corner of the area you want to copy and press the tip of the pen lightly to fix the starting point. With the tip of the pen pressed down lightly, drag the cursor in a diagonal direction. A square frame will then be displayed.



Release the tip of the pen once the area you want to copy has been enclosed.

(When using [Lasso]) Enclose the area you want to copy with the tip of the pen pressed down lightly. The line traced by the pen will then appear. When this line has formed the shape you want release the tip of the pen

4. Place the cursor inside the frame (line traced by the pen) and drag it with the tip of the pen pressed down, releasing it where you want the selection to go. Press the tip of the pen outside the frame to fix the new location of the selection. You can move the selection any number of times while the frame is displayed.

Enlarge

1. Select [Enlarge]

2. When you want to make an enlarged copy of a square area, select [Enclose] and when you want to make an enlarged copy of any other shape, select [Lasso].

3. (When using [Enclose]) Place the cursor at a point in a corner of the area you want to make an enlarged copy of and press the tip of the pen lightly to fix the starting point. With the tip of the pen pressed down lightly, drag the cursor in a diagonal direction. A square frame will then be displayed. Release the tip of the pen once the area you want to enlarge has been enclosed.

(When using [Lasso]) Enclose the area you want to make an enlarged copy of with the tip of the pen pressed down lightly. The line traced by the pen will then appear. When this line has formed the shape you want release the tip of the pen

4. The frame (line traced by the pen) will be in the form of a dotted line and a frame four times larger will be displayed around it. The further outside the enlarged frame you move the cursor the greater the degree of enlargement will be.

5. When it is the size you want press the tip of the pen lightly again to determine how much it is to be enlarged by.

6. Place the cursor inside the enlarged frame and drag it with the tip of the pen pressed down, releasing it where you want the selection to go. Press the tip of the pen lightly outside the frame to fix the new location of the selection. You can move the selection any number of times while the frame is displayed.

Only regular square shapes can be enlarged with [Enlarge], and they can be enlarged to four, nine and sixteen times their normal size.

Reduce

1. Select [Reduce]

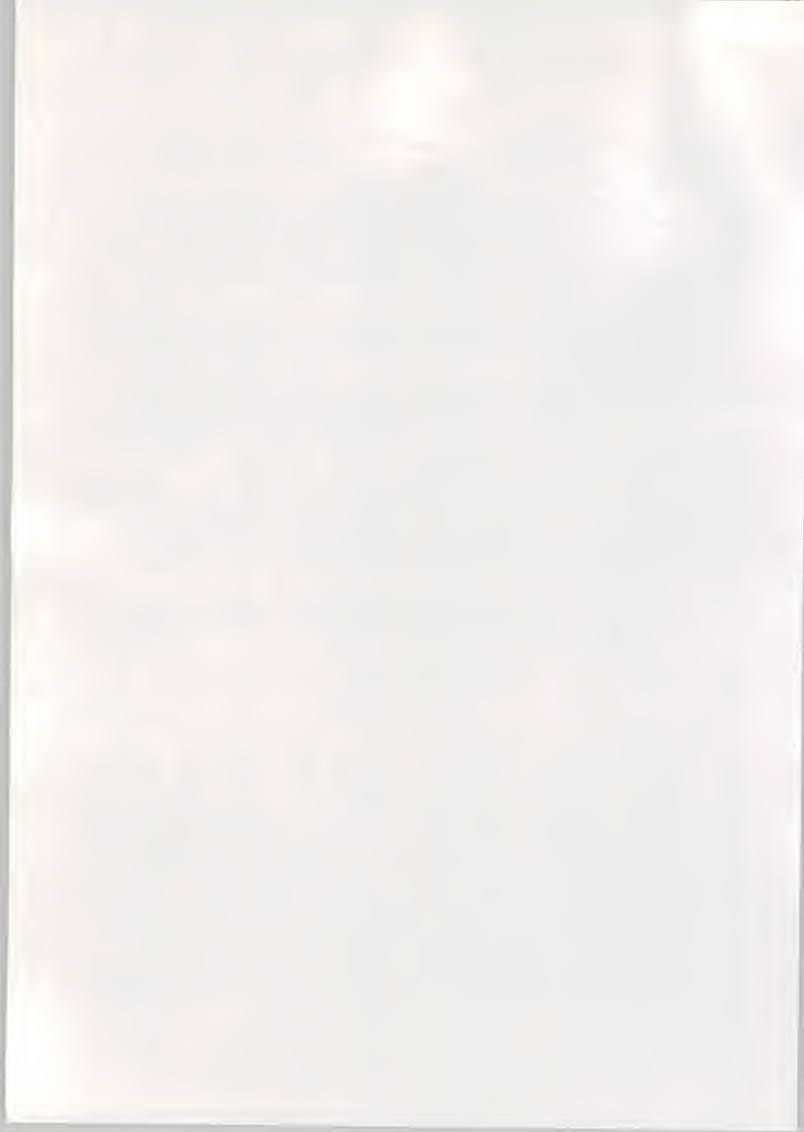


2. When you want to make a reduced copy of a square area, select [Enclose] and when you want to make a reduced copy of any other shape, select [Lasso].
3. (When using [Enclose]) Place the cursor at a point in a corner of the area you want to make a reduced copy of and press the tip of the pen lightly to fix the starting point. With the tip of the pen pressed down lightly, drag the cursor in a diagonal direction. A square frame will then be displayed. Release the tip of the pen once the area you want to reduce has been enclosed.
(When using [Lasso]) Enclose the area you want to make a reduced copy of with the tip of the pen pressed down lightly. The line traced by the pen will then appear. When this line has formed the required shape release the tip of the pen
4. The frame (line traced by the pen) will be in the form of a dotted line and a frame a quarter of its size will be displayed inside it. The further inside the reduced frame you move the cursor the more it will be reduced.
5. When it is the size you want press the tip of the pen lightly again to determine how much it is to be reduced by.
6. Place the cursor inside the reduced frame and drag it with the tip of the pen pressed down, releasing it where you want the selection to go. Press the tip of the pen lightly outside the frame to fix the new location of the selection. You can move a selection any number of times while the frame is displayed.

Only regular square shapes can be reduced with [Reduce], and they can be reduced to a quarter, a ninth, a sixteenth and so on of their normal size ad infinitum.

Cut

1. Select [Cut]
2. When you want to cut a square area, select [Enclose] and when you want to cut any other shape, select [Lasso]
3. (When using [Enclose]) Place the cursor at a point in a corner of the area you want to cut and press the tip of the pen lightly to fix the starting point. With the tip of the pen pressed down lightly, drag the cursor in a diagonal direction. A square frame will then be displayed. Release the tip of the pen once the area you want to cut is enclosed.
(When using [Lasso]) Enclose the area you want to cut with the tip of the pen pressed down lightly. The line traced by the pen will then be displayed. Release the tip of the pen once the line traced by the pen has formed the shape you want.
3. The area enclosed by the frame (line traced by the pen) will be deleted.



How to use other Tools

Size of the Suisai Set

1. To make the [Suisai Set] smaller, select [Size of Suisai Set]. To change to the larger [Suisai Set], select [Size of Suisai Set] while it is in the small size.

Canvas colour

1. Select [Canvas colour]
2. Two different colours will be displayed in a dialog box. In the colour samples, a standard canvas colour (on the left) and the [Brush colour] (on the right) are displayed.
3. Position the cursor on either one of the colour samples and press the tip of the pen lightly to change the canvas to that colour.
* When running [Canvas colour] the picture you are drawing at the time will disappear.

Cancel (Undo)

1. Select [Cancel] to cancel the last action taken.

Warning

The shape of the cursor may change to an [Hourglass] shape while you are running a Tool. If this happens press the tip of the pen or the switch halfway down the pen to continue what you are doing.

We advise you to stop what you are doing while the [Hourglass] is displayed as the picture you are drawing may be affected.

FUNCTIONS ON THE MENU BAR

List of functions on the Menu Bar

[File(F)] Menu

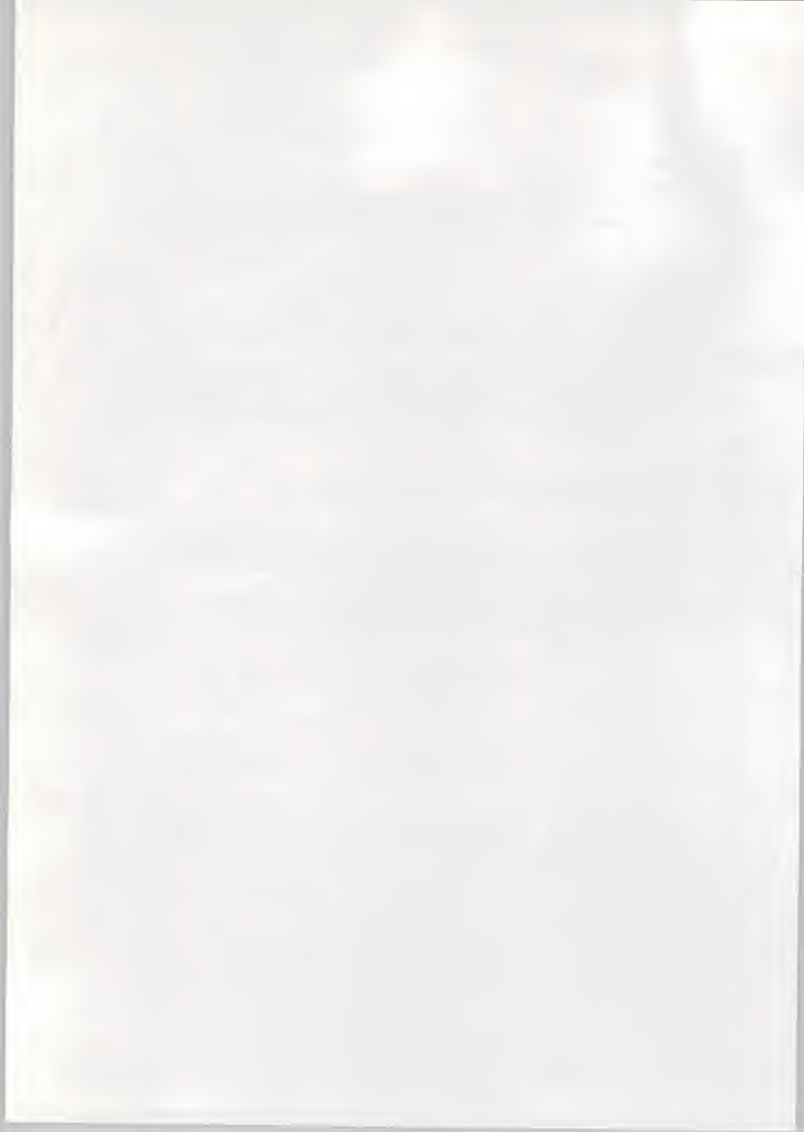
New(N)

Creates a new canvas.

Open(O)

Opens a picture which has been saved

Close (C)



Closes the canvas currently open

 (Open all??)(V)

Opens pictures which have been saved one after another on the current canvas. Displays only those sections of the pictures called up which have been done in [Paints], [Pencil] or with the [Painting Tools] one after another on the current canvas. (Meaning that you can see through the standard canvas colour (white))

 Delete(D)

Deletes a picture that has been saved

 Save(S)

Saves a picture under its current name

 Save As(A)

Saves a picture under another name

 Print(P)

Prints out a picture

 Printer Setup(R)

Sets up the printer

 Exit Suisai(X)

Exits [Suisai]

[Edit(E)] Menu

 Undo(U)

Cancels the last action taken

 Cut(T)

Cuts out sections selected with [Enclose] or [Lasso] and copies them onto the Clipboard

 Copy(C)

Copies sections selected with [Enclose] or [Lasso] onto the Clipboard

 Paste(P)

Pastes from the Clipboard onto the canvas

[View(V)] Menu

 Reduced View(R)

Displays the canvas at a reduced size

 Full Screen(S)

Displays the canvas on a full screen

 Conceal/Display Menu(H)

Conceals (displays) the [Suisai Set]

 Display/Conceal Brush shape(B)

Displays (conceals) the [Brush shape] window. (P.)



[Options(O)] Menu

Canvas size(S)

Changes the size of the canvas (P.)

Creating a Toolbox(T)

Changes the [Toolbox] (P.)

Switching Toolbox

Switches [Toolbox] for a Toolbox which has been saved before

Creating Paints(M)

Creates [Paints] (P.)

Switching Paints(P)

Switches a [Paint] for a [Paint] that has been saved

(??)

----(??)-----

Creating patterns

Creates patterns for the [Stamp] (P.)

Switching patterns

Switches the pattern on the [Stamp] for one saved before

[Windows(W)] Menu

Cascade(C)

Displays canvases stacked one on top of another

Tile(T)

Displays canvases side by side

Arrange icons (I)

Arranges canvas icons

[Help(H)] Menu

Contents(C)

Displays the contents of Help

How to use Help(C)

Displays instructions on how to use Help

About [Suisai](A)

Displays the [Suisai] Version No. etc.

[View]

Displaying the Brush shape

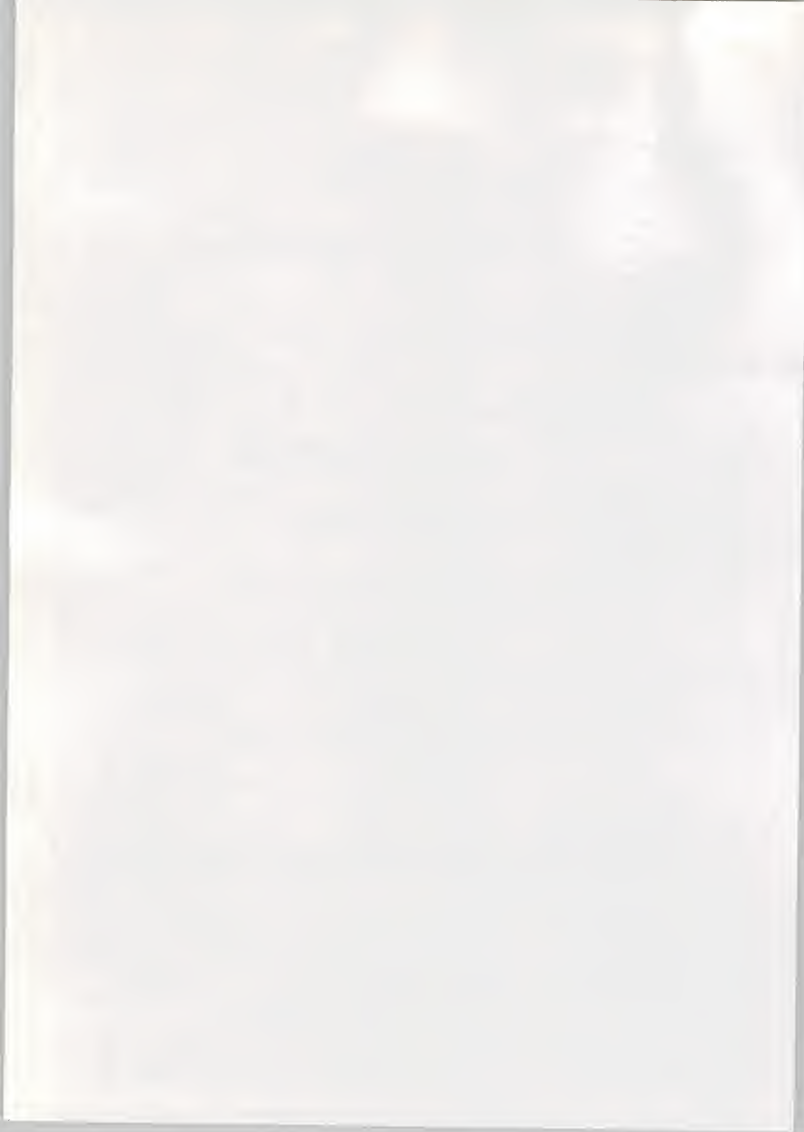
1. The [Brush shape] window is displayed
2. Press the tip of the pen lightly on the brush shape you want for it to appear in [Brush shape].

(A) Brush shape

[Options]

Canvas size

1. The [Canvas size] dialog box will be displayed



2. Choose the size of canvas you want from [Paper Selection] and horizontal/vertical from [Paper Direction] and then select [OK]
3. When no change is to be made, select [Cancel]

Canvas Size

Paper Selection

A3
B4
A4
Postcard

Paper Direction

Vertical Horizontal

OK

Cancel

[Options]

Creating a Toolbox

1. The [Creating a Toolbox] dialog box will be displayed
2. Select the Tool group you want to change from [Group]
3. When you are removing a Tool from the [Toolbox], choose the painting tool you want to remove from the [Toolbox] and then select [Delete]. The Tool you have chosen will be enclosed in a red frame. When you select [Delete All], all the painting tools in the [Toolbox] will be deleted.
4. When you are adding a Tool to the [Toolbox], choose where you want to record it from the [Toolbox] and which painting tool you want to record from [Tools] and then select [Switch].
5. Once the Toolbox has been created, select [OK]. Select [Save] when you want to save the [Toolbox] created in a file. Select [Reset] to go back to the beginning.

* The [Toolbox] you have created will be saved when you exit [Suisai]. If you want to go back to the original setting, select [default.tbx] with [Switching Toolbox]

Creating a Toolbox

Group: Painting

Toolbox:

Tools:

Switch

Delete

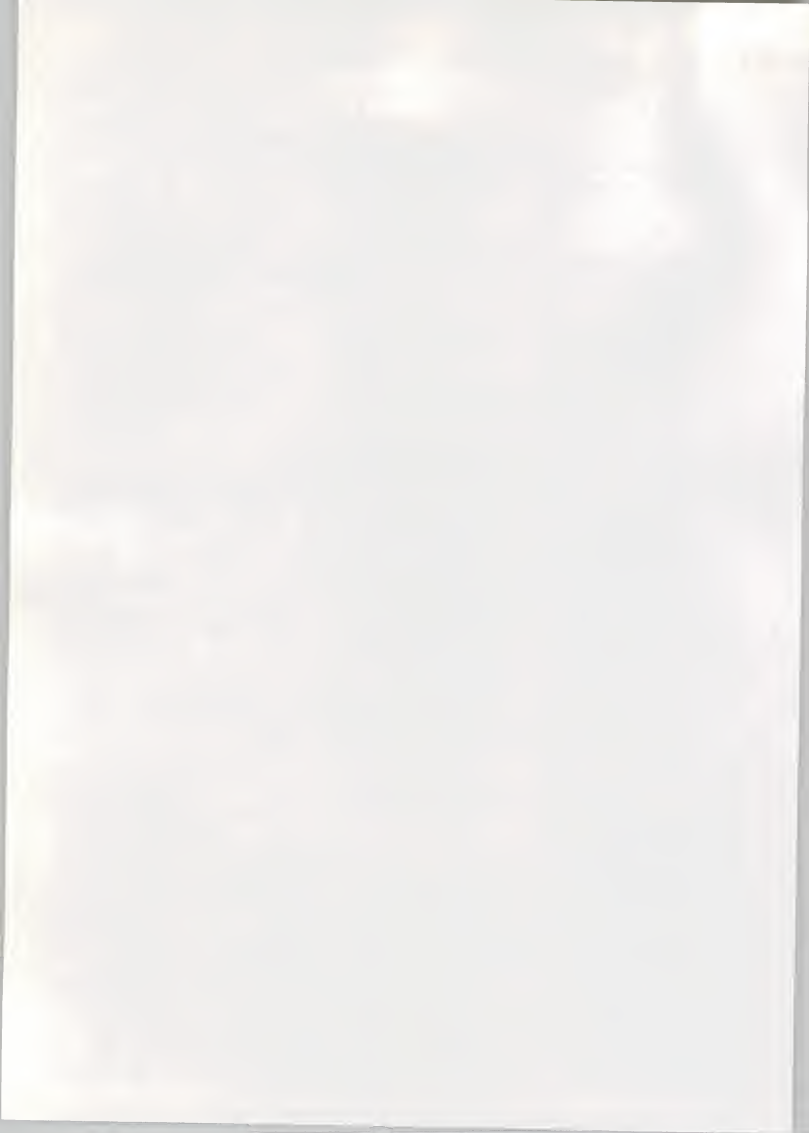
Delete All

OK

Cancel

Reset

Save



[Options]

Creating Paints

1. The [Creating Paints] dialog box will be displayed
2. Select the colour you want to modify from [Paints]. The colour selected will be enclosed by a red frame
3. To take the colour out, drag the cross-shaped cursor on the [Colour Palette] below [Paints] to the left with the tip of the pen pressed down. Adjust brightness with the [Luminosity Palette] to the right of the [Colour Palette].
4. Once the Paint has been created, select [OK]. Select [Save] when you want to save the [Paint] created in a file.
To go back to the beginning, select [Reset]. The [Siphon] can also be used to take a colour from anywhere other than the Colour Palette.

Creating Paints

Paints:

OK
Cancel
Reset
Save
Siphon

Hue:
Red:

Saturation:
Green:

Luminosity:
Blue:

* The [Paints] you have created will not be saved when you exit [Suisai]. Make sure you always save any [Paints] you have created so that you can call them up with [Switching Paints] next time you start up.

[Options]

Creating Patterns

1. The [Creating Patterns] dialog box will be displayed
2. Select the pattern you want to modify from [Patterns]. The pattern selected will be enclosed in a red frame and displayed under [Style].
3. Make the pattern you want with [Style]. Squares on the grid will turn black when you press the tip of the pen and white when you press the switch halfway down the pen.
4. Once the [Pattern] has been created, select [OK]. Select [Save] when you want to save the [Pattern] created in a file.
5. To go back to the beginning, select [Reset].



Creating Patterns

Patterns:

OK

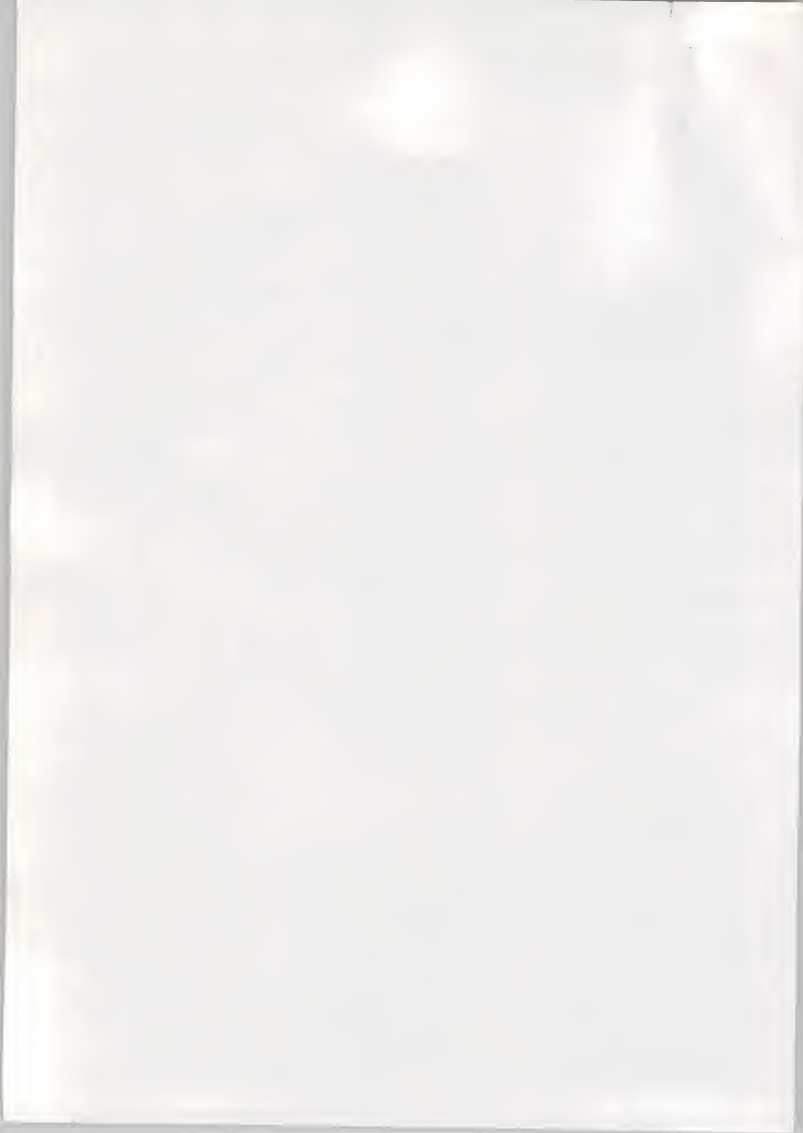
Cancel

Style:

Reset

Save

* The pattern you have created will not be saved when you exit [Suisai].
Make sure you always save a pattern you have created so that you can
call it up with [Switching Patterns] next time you start up.



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ORDER DESCRIPTION		AMOUNT
For:		
CUSTOM PROJECT:		
<i>Identification and Assessment of Leading or Emerging Multimedia Companies in Europe</i>		£9,750.00
Total Cost of £19,500 + VAT		
<i>Project complete balance now due</i>		
Payment 2 of 2		
Additional Expenses incurred (telephone, faxes, misc. supplies and photocopying)		£1,465.00
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TOTAL		£13,177.63



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PROJECT: <i>MULTI-MEDIA RESEARCH PROJECT</i>	PROJECT CODE: <i>YNCH</i>
DATE EXPENSES BILLED:	CONTRACT VALUE: <i>£19,500</i>
AGREED % OF CONTRACT VALUE CHARGEABLE AS EXPENSES <i>10 % = £ 1,950</i>	

ITEM/RATE	DETAILS	£	
CHARGEABLE FAXES			
A4 outgoing fax £1.25/sheet	<i>100 x 125</i>	<i>125</i>	<i>00</i>
CHARGEABLE PHOTOCOPYING			
A4 photocopy 10p/sheet	<i>500</i>	<i>50</i>	<i>00</i>
A3 photocopy 10p/sheet			
A4 colour copy £1.20/sheet			
A3 colour copy £3.00/sheet			
BINDING/COVERS/MATERIALS			
A4 spiral binding	<i>5X BLACK FOLDERS SEPARATORS PLASTIC POCKETS</i>	<i>17</i>	<i>00</i>
A4 separators		<i>5</i>	<i>00</i>
A4 acetate covers		<i>10</i>	<i>00</i>
leatherette 'perfect binding' with foil lettering			
CHARGEABLE TELEPHONE CALLS			
UK telephone call £1.00/min	<i>6 HOURS</i>	<i>360</i>	<i>00</i>
EC telephone call £1.50/min	<i>11 HOURS</i>	<i>1650</i>	<i>00</i>
non-EC telephone call £2.00/min	<i>0</i>	<i>720</i>	<i>00</i>
POSTAGE & PACKING			
EXPRESS COURIERS			
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airline flight			
hotel costs			
misc (please state)			
OTHER <i>DIRECTORY OF MULTI-MEDIA (CD ROM) COMPANIES</i>	<i>PART OF DELIVERABLES ISSUED 24.1.97</i>	<i>126</i> <i>178</i>	<i>28</i> <i>00</i>
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NUMBER 2812958X - ISH
DATE & TAX POINT 22-10-96
PICK LIST 55190/002
PAGE NO. 1

PLEASE REMIT TO THE ABOVE ADDRESS

ALWAYS QUOTE INVOICE No. AND RAISE QUERIES IMMEDIATELY

Publisher Codes:
CHA Chambers
FR W H Freeman
GU Guinness
HAR Harrap Publishers Ltd
KF Kingfisher
LAR Larousse
MD Macmillan Direct
ME Macmillan Education
MGB Macmillan General Books
MP Macmillan Press
OMA O'Mara
OTH Others
SB Sunburst Books
WF W Foulsham Ltd

CUSTOMER INFORMATION :-

ACCOUNT NO. 002070030
CONTACT NAME Michelle or Pat
DIRECT TEL NO. (DDI) 01256 302685/302687
PREFERRED DAY Not Applicable
CARRIER / ROUTE 02 07
DESCRIPTION LONDON COLNEY
VAT NO. GB 199 4406 21

002

CHARGE TO
CHRIS HARRIS
4 DOGROSE COURT
WENLOCK GARDENS
HENDON

NW4 4XJ

DESPATCHED TO A
CHRIS HARRIS-PROG MGR
INPUT
CORNWALL HOUSE
55-77 SLOUGH HIGH STREET
SLOUGH
BERKS
SL1 1DZ

SEE REVERSE FOR TERMS & CONDITIONS OF SUPPLY AND FOR NET BOOK AGREEMENT

PRINTED BOOKS UNLESS OTHERWISE STATED

INTERNAL USE ONLY	ORDER REF.	QTY	ISBN	ED	PUB	TITLE	AUTHOR	T Y P E	PRICE	TRADE DISC %	VALUE	VAT	BOU
7F2261 1	L SOMMERSTEIN L SOMMERSTEIN	1	0333670345 0333670353	01	MP	Thank you for your remittance. This invoice is sent for record purposes only MULTMED/CD-ROM DIR (JULY 96) CD-ROM THE CD-ROM 17E 1 Not Yet Published (Recorded) Other Charges:- GBS 3.00 P & P VAT at 17.50% (code 2) on 175.00 = Total VAT PRICE ANALYSIS 1 @ 175.00	TFPL TFPL	F	175.00	0.00	175.00	2	
									30.63				
									30.63				



INTERNAL ONLY

BOOKS	1	KEYED BY	BXH
LINES	1	BATCH	88187/003
WEIGHT	0.099	BRICK	0117
CARTONS		TYPE	A INCI
INV. DISTR.	101100	SPOOL FILE NAME	XWDOHA5190SI



Items
Zero
Rated
Unless
Otherwise
Stated

TOTAL 175.00
SUNDRIES 3.00
VAT 30.63

INVOICE TOTAL £ 208.63



ORDER/INVOICE/FULFILLMENT 2000132

Acctg. ONLY

Inv. Comp.	By: <u>WJ</u>	Date: <u>27-9-96</u>	Client #	Order #	Inv. #	Multi-Invoicing of
ORIGINATOR (Signature) <u>MCA-2</u>			DATE <u>26/9/96</u>		APPROVALS <u>Peter Limer</u> VP Sales/Res. <u>27.09.96</u> Date Controller Date	
Company <u>NTI DATA</u>		CA Tax Rate				
Name Mr./Ms. <u>EIICHI NAKAJURA</u>		CT Tax 8%				
Position <u>GENERAL MANAGER</u>		Salutation				
Address <u>FIFTH FLOOR</u>		State				
<u>30-34 MOORATE</u>		Zip <u>EC2R 6DN</u>				
City <u>LONDON</u>		Country <u>ENGLAND</u>				
Province		Fax <u>0171-374 2275</u>				
Phone <u>0171-374 6040</u>		Tlx				

Special instructions for invoicing, progress billing, or delayed payments, etc.
50% ON COMPLETION OF PROJECT, BALANCE PLUS EXPENSES ON COMPLETION.

CLIENT AUTH.

ORDER

Contract Year Beg. <u> </u> End <u> </u>	Invoice Type <input type="checkbox"/> Fulfillment Only <input checked="" type="checkbox"/> W/Order (OR) <input type="checkbox"/> Monthly (MO) <input type="checkbox"/> Quarterly (QT) <input type="checkbox"/> Pending	Employee # Sold by: <u>613</u> <u>100%</u> % %	Employee # Commission to: <u>613</u> <u>100%</u> % %
<input checked="" type="checkbox"/> New Order (N1) <input type="checkbox"/> Prior Yr (N3) <input type="checkbox"/> Renewal (N2) <input type="checkbox"/> Cancel			

PO# INPUT Contract ☐ Letter ☒ Verbal ☐
 Attach all authorizing documents to white (contract) copy.

SHIP TO

Company <u> </u>	Province <u> </u>
Name Mr./Ms. <u> </u>	Salutation <u> </u>
Position <u> </u>	State <u> </u>
Address <u> </u>	Zip <u> </u>
City <u> </u>	Country <u> </u>
	Phone <u> </u>

ITEM TYPE

- Subscription (SB)
- Custom (YC/ZC/KC)VC
- Multiclient (MC)
- Reports (RP)
- Copies (CP)
- Consult/Present (PR)
- Newsletter (NL)
- Reimbursed Costs (EX)
- Merger/Acq. (ME)
- Exec Overview (EO)
- Conf/Seminar (CN)

DETAIL

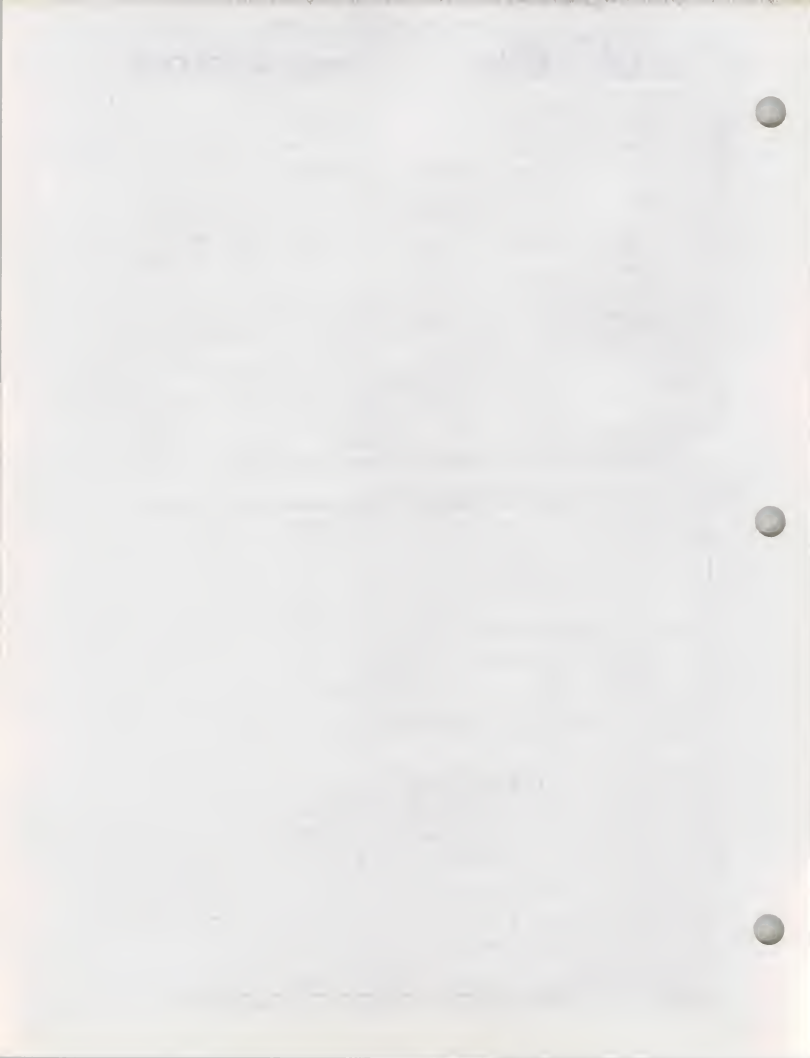
Indicate US, UK, FR, VA	Prod. ID/Year	Item Type Code	Item Description or Title	Quantity	Price	Shipped By	Date
<u>UK</u>		<u>YC</u>	<u>IDENTIFICATION A</u>	<u>1</u>	<u>£19,500</u>		
			<u>ASSESSMENT OF LEADING</u>				
			<u>OR EVALUATING MULTIMEDIA</u>				
			<u>COMPANIES IN EUROPE</u>				

Fulfillment to be completed in: ☐ Corporate ☒ London ☐ Virginia ☐ France ☐ Other

• White - Contract • Green - Fulfillment • Yellow - Invoice • Pink - Originator • Goldenrod - Sales Manager

M&S180 12/92

INPUT



ORDER/INVOICE/FULFILLMENT

Acctg. ONLY

Inv. Comp.	By	Date	Client #	Order #	Inv. #	Multi-Invoicing of
		27-9-96		200056	200000	
ORIGINATOR (Signature) <u>M. J. J.</u> DATE <u>26/3/96</u>						APPROVALS <u>VP Sales/Res.</u> <u>27.09.96</u> Date Controller Date
Company		Name Mr./Ms.		CA Tax Rate	CT Tax 8%	
NIT DATA		EUKU NAKAMURA				
Position		Address		Salutation	State	
GENERAL MANAGER		FIFTH FLOOR				
		30-34 MOORCOTE		Zip	EC2A 6BN	
City		Country		Fax	071-374 2275	
LONDON		ENGLAND		Tlx		
Province		Phone				
		071-374 6040				

Special instructions for invoicing, progress billing, or delayed payments, etc.

50% ON COMPLETION OF PROJECT. BALANCE PLUS EXPENSES ON COMPLETION.

ORDER

Contract Year Beg.	End	Invoice Type	Employee # Sold by:	Employee # Commission to:
		<input type="checkbox"/> Fulfillment Only <input checked="" type="checkbox"/> W/Order (OR) <input type="checkbox"/> Monthly (MO) <input type="checkbox"/> Quarterly (QT) <input type="checkbox"/> Pending	613 100%	613 100%
<input checked="" type="checkbox"/> New Order (N1) <input type="checkbox"/> Renewal (N2)	<input type="checkbox"/> Prior Yr (N3) <input type="checkbox"/> Cancel			

CLIENT AUTH.

PO# INPUT Contract ☐ Letter ☒ Verbal ☐
 Attach all authorizing documents to white (contract) copy.

SHIP TO

Company	Province
Name Mr./Ms.	Salutation
Position	State
Address	Zip
	Country
City	Phone

ITEM TYPE

- | | | |
|--|---|---|
| <ul style="list-style-type: none"> • Subscription (SB) • Custom (YC/ZC/KC)VC • Multiclient (MC) • Reports (RP) | <ul style="list-style-type: none"> • Copies (CP) • Consult/Present (PR) • Newsletter (NL) • Reimbursed Costs (EX) | <ul style="list-style-type: none"> • Merger/Acq. (ME) • Exec Overview (EO) • Conf/Seminar (CN) |
|--|---|---|

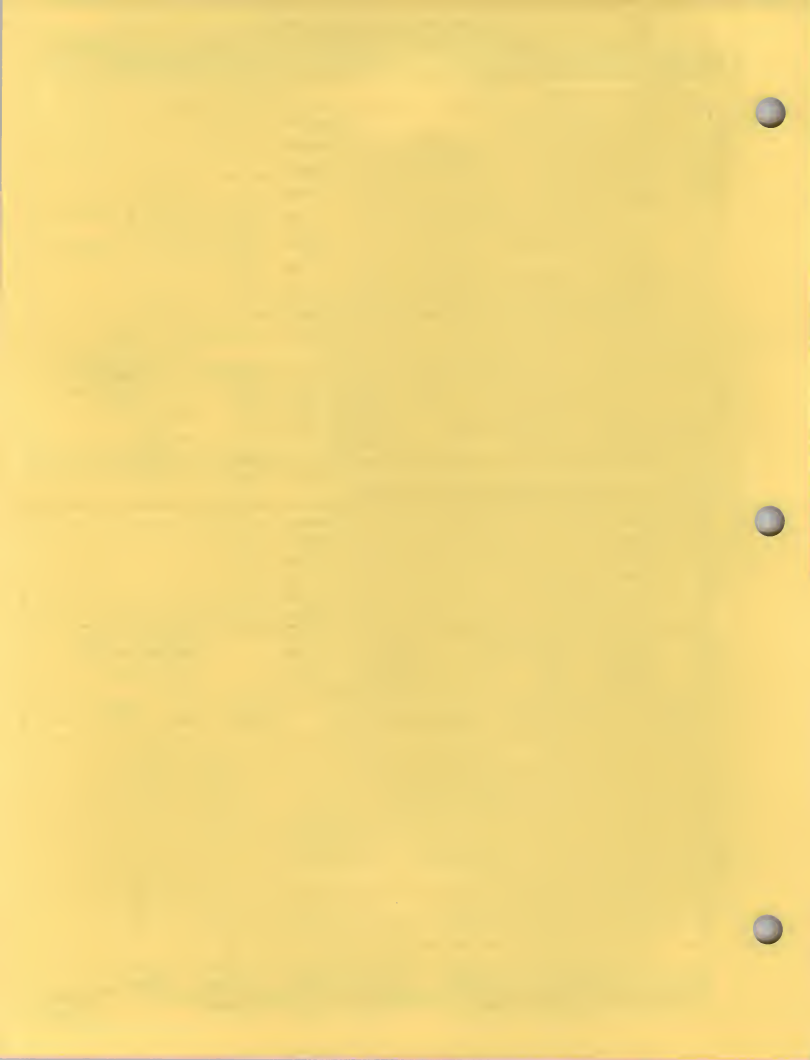
DETAIL

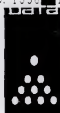
Indicate US, UK, FR, VA	Prod. ID/Year	Item Type Code	Item Description or Title	Quantity	Price	Shipped By	Date
UK		YC	IDENTIFICATION & ASSESSMENT OF LEADING OR EMERGING MULTIMEDIA COMPANIES IN EUROPE	1	£19,500		

Fulfillment to be completed in: ☐ Corporate ☒ London ☐ Virginia ☐ France ☐ Other

• White - Contract • Green - Fulfillment • Yellow - Invoice • Pink - Originator • Goldenrod - Sales Manager

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INPUT



**NTT DATA UK
COMMUNICATIONS SYSTEMS
CORPORATION****UK Branch**5th Floor, 30/34 Moorgate,
London EC2R 6DN U.K.
Telephone: 0171 - 374 - 0040
Facsimile: 0171 - 374 - 2275***Facsimile Transmittal******Date: 24/September/96******Our Ref. No.:***

To:	Mr. Mike Friend
Company:	INPUT
Section:	
Phone:	01753-530444
Fax:	01753-577311

No. of Pages (Including this cover page): 2

From:	Masaki Murota
Company:	NTT DATA UK Branch
Phone:	0171-374-0040
Fax:	0171-374-2275

Acceptance of your proposal

Dear Mike,

Thank you very much for your draft proposal faxed on 18 September 1996 with regard to the research into the European multimedia market.

We would like to accept your draft proposal with a few small conditions below;

- We would like you to supply us with any references or any documents you would obtain during your research along with the profiles of the leading companies (APPENDIX). This is to increase the volume of the deliverables of your research.
- We would like to commence the research from the first day of October so that the kick-off meeting would take place on 1 October 1996 if it is acceptable to you. Accordingly the amendment of the date of the kick-off meeting described as the end of September would be appreciated.

Registered Office as above

Head Office Toyosu Centre Bldg. 3-3, Toyosu 3-Chome Koto-ku, Tokyo 135 Japan
Registered in England Company No. FC15700 Branch No. BR000879 VAT Registration No. 577 4808 92



I would appreciate it if you could amend the relevant part of your draft proposal and forward it to me to sign it before we will meet at the kick-off meeting.

I hope this requirement is acceptable to you.

However, if you have any queries or any questions please do not hesitate to contact me.

Yours sincerely



Masaki Murota



ENGLAND = E
FRANCE = F
GERMANY = G
USA = U
ALL = A

PROJECT SCHEDULE (Q1 - 1996)

INPUT

* Corporate Week ** Ending date *** Working Days

Activity	Name	Days	JANUARY				FEBRUARY				MARCH				
			1*	2	3	4	5	6	7	8	9	10	11	12	13
			1/5**	1/12	1/19	1/26	2/2	2/9	2/16	2/23 A-U(5)	3/1	3/8	3/15	3/22	3/29
			A(4)***	A (5)	A (5)	A (5)	A (5)	A (5)	A (5)	A (4)	A (5)	A (5)	A (5)	A (5)	A (5)
Proj. Spec.	PL	3			2	1									
Quest. Design/Test/QC.															
User Interviews: # ()	RH				1										
Vendor Interviews: # ()															
Secondary Research	RH				1										
Data Tab./Analysis															
Forecasting	CH							1	1						
Write Report. # of Pages ()	CH								2						
Abstract/Press Release/Brochure															
INPUT/Output Article/SLIDES															
Production/QC.	CH														
Project Wrap-up/Thank You															
PLAN					2	3		1	3	2					
TOTAL SPENT					2	3		2	3	3					

Proj. Code: YNTT

Proj. Name: SVISA1

Prepared By: CJH

Proj. Manager: CJH

Date: 8-02-96

the 1990s, the incidence of *S. flexneri* has increased in the United Kingdom [10].

There is a paucity of data on the incidence of *S. flexneri* in the United Kingdom. The only published data are from a study of 10 years of *S. flexneri* isolates from patients with acute colitis in the United Kingdom [11]. The incidence of *S. flexneri* in this study was 1.2 cases per 100 000 per year. The incidence of *S. flexneri* in the United Kingdom is likely to be higher than this, as the study was limited to patients with acute colitis.

The purpose of this study was to determine the incidence of *S. flexneri* in the United Kingdom. The study was designed to determine the incidence of *S. flexneri* in the United Kingdom, and to determine the incidence of *S. flexneri* in the United Kingdom.

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Project Specification Statement

Prepared by: <i>CARIS HARRIS</i>	Approved by:
Date: <i>23.2.96</i>	Date:

I. DESCRIPTION

A. Project Code: <i>MNTT</i>	B. Program: <i>CUSTOM.</i>
C. Project Title: <i>EVALUATION OF UK MARKET POTENTIAL FOR SUIAI</i>	
D. Objectives: • <i>TO EVALUATE THE MARKET OPPORTUNITY FOR SOFTWARE.</i>	
• <i>SUIAI PC 'PAINTING' SOFTWARE IN THE UK.</i>	
•	
•	

E. Audience (order of priority):

	User/Vendor	Job Function	Type Company	Company Characteristics
1.	<i>NTT DATA.</i>		<i>TELECOMS.</i>	<i>JAPANESE.</i>
2.				
3.				
4.				
5.				

F. Uses of Report: *INTERNAL REPORT TO ASSESS MARKET PROSPECTS OF NTT SOFTWARE.*

G. Reasons for Choosing the Subject:

1.	<i>CUSTOM.</i>
2.	
3.	
4.	



H. Client Interest:	
Client	Interest Level/Comment

II. SCOPE

I. Scope of Study:	
1.	Includes: (1) OVERALL POTENTIAL MARKET SIZE FOR THE
2.	SOFTWARE PRDT - CURRENT & PREDICTED, ACCORDING TO MAIN
3.	USER SEGMENTS. (2) ATTENTION TO RECOMMENDED DISTRIBUTION CHANNEL.
4.	(3) ATTRACTION OF WIN3.1 FORMAT CF. WIN95 FORMAT.
1.	Excludes: OTHER EC COUNTRY ANALYSIS.
2.	
3.	
4.	

J. Issues:	
1.	WHO ARE MAIN COMPETITORS, IN WHICH SEGMENTS + WHY?
2.	WHAT PRICE WILL THE MARKET BEAR FOR THE PACKAGE?
3.	WILL THE GENIUS GRAPHICS TABLET ADD VALUE TO THE OVERALL
4.	PACKAGE?
5.	WHO ARE THE KEY DISTRIBUTORS?
6.	
7.	



K. Forecast: <input type="checkbox"/> No <input type="checkbox"/> Yes		Period:
<input type="checkbox"/>	Items to be Forecast	Level (e.g.: summary or detail*):
<input type="checkbox"/>	IS Expenditures	
<input type="checkbox"/>	Computer Equipment	
<input type="checkbox"/>	Telecommunications	
<input type="checkbox"/>	Personnel Expenses	
<input type="checkbox"/>	Processing Services	
<input type="checkbox"/>	Network Services	
<input type="checkbox"/>	Professional Services	
<input type="checkbox"/>	Systems Operations	
<input type="checkbox"/>	Systems Integration	
<input type="checkbox"/>	Software Products	
<input type="checkbox"/>	Turnkey Systems	
<input type="checkbox"/>	Other -	TOTAL UK DEMAND FOR S/W PRDTS.
<input type="checkbox"/>	Other -	RATIO OF DOS/WIN3.1 / WIN 95 FORMATS FOR BUS. S/W.
<input type="checkbox"/>	Other -	" " " LEISURE S/W
<input type="checkbox"/>	Other -	" " " EDUCATIONAL S/W
<input type="checkbox"/>	Other -	
<input type="checkbox"/>	Other -	

[illegible]

III. METHODOLOGY

M. Interview Profile:

1. Type of Interview and Interviewer Level

	On-Site		Phone		Mail	TOTAL
Type of Respondent	Consultant	R/A	Consultant	R/A		
User						
Vendor						
Other (specify)						
TOTAL						

2. Respondent Characteristics

Number of Interviews	Job Function	Company Characteristics (e.g.: SIC, Size, etc.)

N. Other Research:

1. Library: Source:

2. On-line Services: Source:

Objective:

Objective:

3. Previous INPUT Reports: (list)

Code	Title	Relevant Information

4. Other Sources:



O. Data Tabulation & Analyses:

IV. DELIVERABLES

P. Report / Presentation Format:

Attached and check boxes:

- | | |
|---|--------------------------------|
| <input type="checkbox"/> 1. Table of Contents | - See attached form RES 242/02 |
| <input type="checkbox"/> 2. List of Exhibits | - See attached form RES 242/03 |
| <input type="checkbox"/> 3. Report Planning Form | - See attached form RES 242/04 |
| <input type="checkbox"/> 4. Exhibits Planning Form | - See attached form RES 242/05 |
| <input type="checkbox"/> 5. Data Base Layout | - See attached form RES 242/06 |
| <input type="checkbox"/> 6. Data Base Report Layout | - See attached form RES 242/07 |

Q. Comments and Directions:

R.

Project Schedule Attached?

☒ Yes

☐ No

