

# EUROPEAN INDUSTRY DIRECTIONS AND FORECASTS

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PETER LINES  
Principal Consultant

INPUT

INPUT

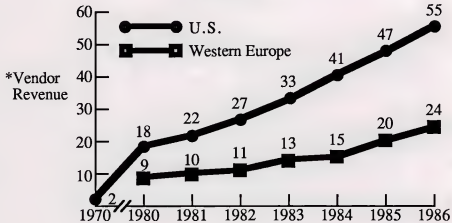
NOTES:

JJJ-PL-1



## REVENUE GROWTH IN THE INFORMATION SERVICES INDUSTRY, 1970-1986

(\$ Billions)



\*Note: Definition changes have slightly affected gross market sizes on a year-to-year basis.

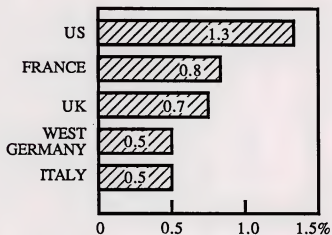
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NOTES:

JJJJ-PL-2



## INFORMATION SERVICES MARKETS % OF GDP



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JJJ-PL-2-1



## LEADING EUROPEAN VENDORS INFORMATION SERVICES

	\$ Millions 1986
CAP GEMINI SOGETI	423
SCICON	254
CISI	219
SEMA-METRA	204
GSI	190
DATEV	187
THORN-EMI	150

INPUT

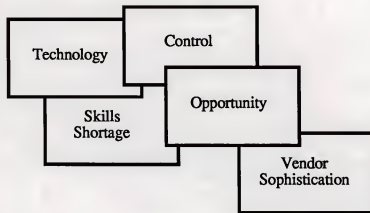
NOTES:

JJJ-PL-2-2





## EUROPEAN MARKET DYNAMICS



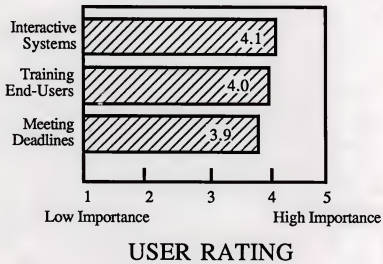
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NOTES:

JJJ-PL-2-3



## KEY USER ISSUES



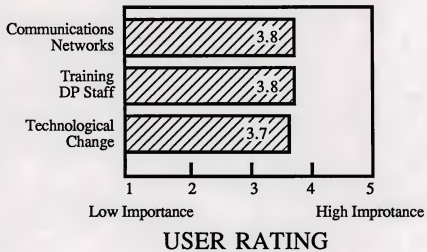
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NOTES:

JJJ-PL-2-4



### KEY USER ISSUES



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NOTES:

JJJ-PL-2-5



## FORECAST PARAMETERS

	<u>(Percent)</u>
• Inflation Assumptions	
- West Germany	+0.2
- France	+3.5
- United Kingdom	+4.1
- Italy	+4.2
• Current Dollars	

INPUT

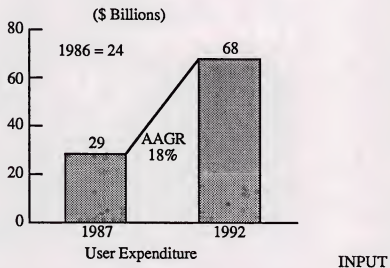
NOTES:

JJJJ-PL-3





## INFORMATION SERVICES MARKET - EUROPE

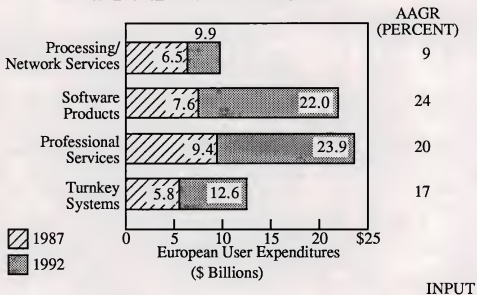


NOTES:

JJJ-PL-4



## INFORMATION SERVICES INDUSTRY BY DELIVERY MODE

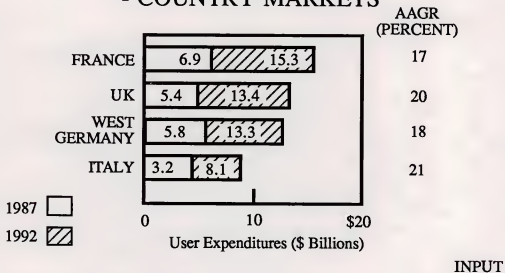


NOTES:

JJJ-PL-5



## INFORMATION SERVICES INDUSTRY - COUNTRY MARKETS

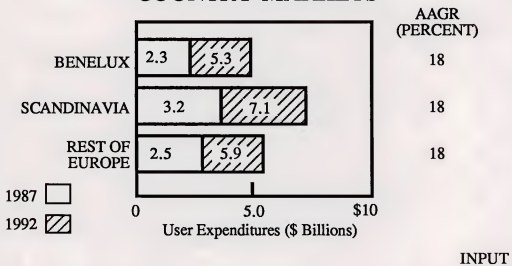


NOTES:

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## INFORMATION SERVICES INDUSTRY - COUNTRY MARKETS



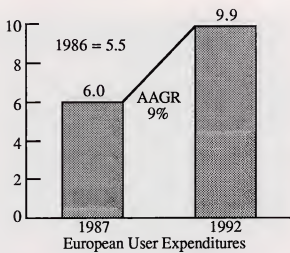
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## PROCESSING/NETWORK SERVICES MARKET (\$ Billions)



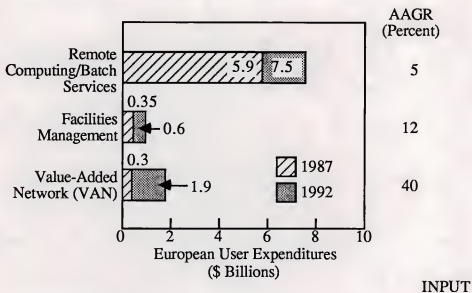
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## PROCESSING/NETWORK SERVICES MARKETS 1987-1992

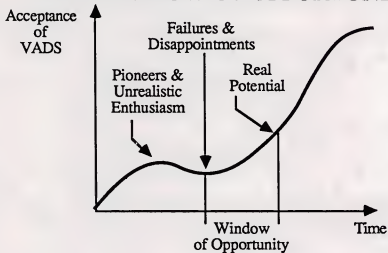


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JJJJ-PL-7



## VADS WINDOW OF OPPORTUNITY?



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## EUROPEAN MARKET STRUCTURE

- US Multinationals
- Strategic Alliances
- PTTs
- Country Market Vendors
- Application Specific Vendors

INPUT

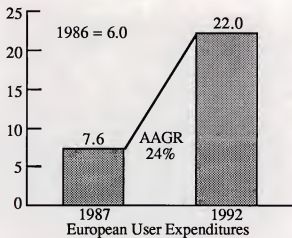
NOTES:

JJJ-PL-7-2





## SOFTWARE PRODUCTS MARKET (\$Billions)



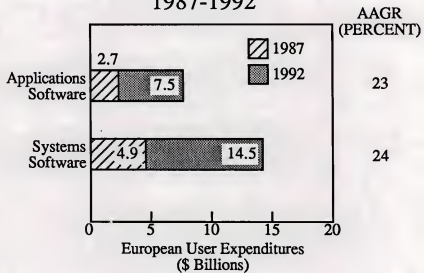
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## SOFTWARE PRODUCTS MARKETS 1987-1992



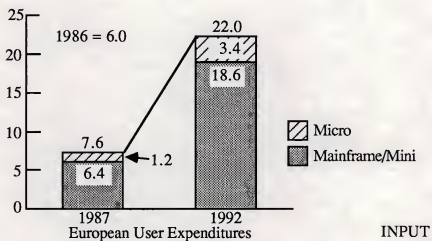
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NOTES:

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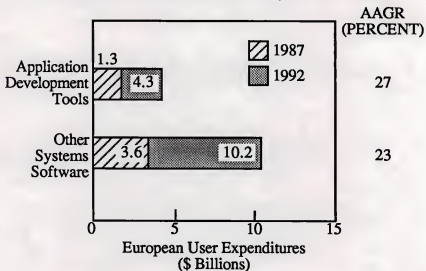
# SOFTWARE PRODUCTS MARKET FORECAST, MAINFRAME/MINI AND MICRO: 1987-1992 (\$ Billions)



NOTES:



## TOTAL SYSTEMS SOFTWARE MARKET BY SOFTWARE TYPE, 1987-1992



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NOTES:

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## **LARGEST EUROPEAN SOFTWARE PRODUCTS VENDORS**

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- ⊙ **1. SCICON**
- ⊙ **2. Thorn-EMI**
- ⊙ **3. MBP**
- ⊙ **4. Software AG**
- ⊙ **5. CGI**

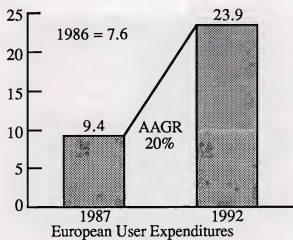
INPUT

**NOTES:**

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## PROFESSIONAL SERVICES MARKET (\$ Billions)



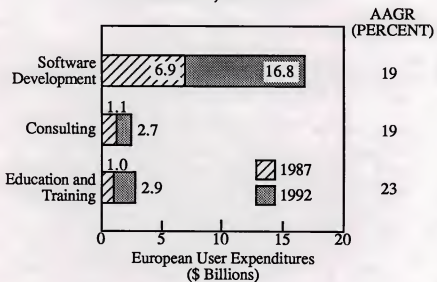
INPUT

NOTES:

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## PROFESSIONAL SERVICES MARKET BY MODE, 1987-1992



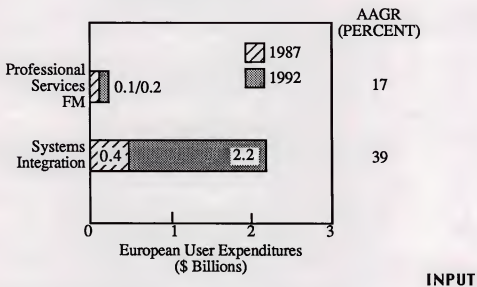
**INPUT**

NOTES:

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## PROFESSIONAL SERVICES MARKET BY MODE, 1987-1992



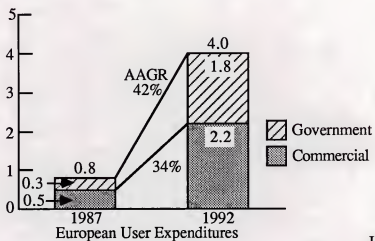
NOTES:

JJJJ-PL-14





## SYSTEM INTEGRATION MARKET, 1987-1992 (\$ Billions)



NOTES:

JJJJ-PL-15



## **EUROPEAN SI MARKET CHARACTERISTICS**

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- ◉ **Emergent Stage**
- ◉ **User Awareness**
  - **Technical**
  - **Commercial**
- ◉ **Joint Ventures**

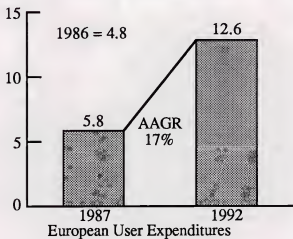
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**NOTES:**

**JJJ-PL-15-1**



STANDARD TURNKEY SYSTEMS  
MARKET, 1987-1992  
(\$ Billions)



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NOTES:

JJJ-PL-16



**LARGEST STANDARD  
TURNKEY SYSTEMS VENDORS  
EUROPEAN MARKET**

- 1. Computervision**
- 2. Intergraph**
- 3. Applicon**
- 4. Calma**
- 5. Racal-Redac**
- 6. SESA**
- 7. Sligos**
- 8. Metier**

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**NOTES:**

**JJJ-PL-16-1**





# CONCLUSIONS

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# VENDOR SELECTION CRITERIA

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- ⊙ Applications Knowledge
- ⊙ Technical Merit
- ⊙ Performance Guarantee
- ⊙ Staff Qualifications

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**NOTES:**

**JJJ-PL-16-3**



# KEY MANAGEMENT CHALLENGES

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- ⊙ **People Management**
- ⊙ **Effective Control**
- ⊙ **Technology**
- ⊙ **User Requirements**

INPUT

**NOTES:**

**JJJ-PL-16-4**

