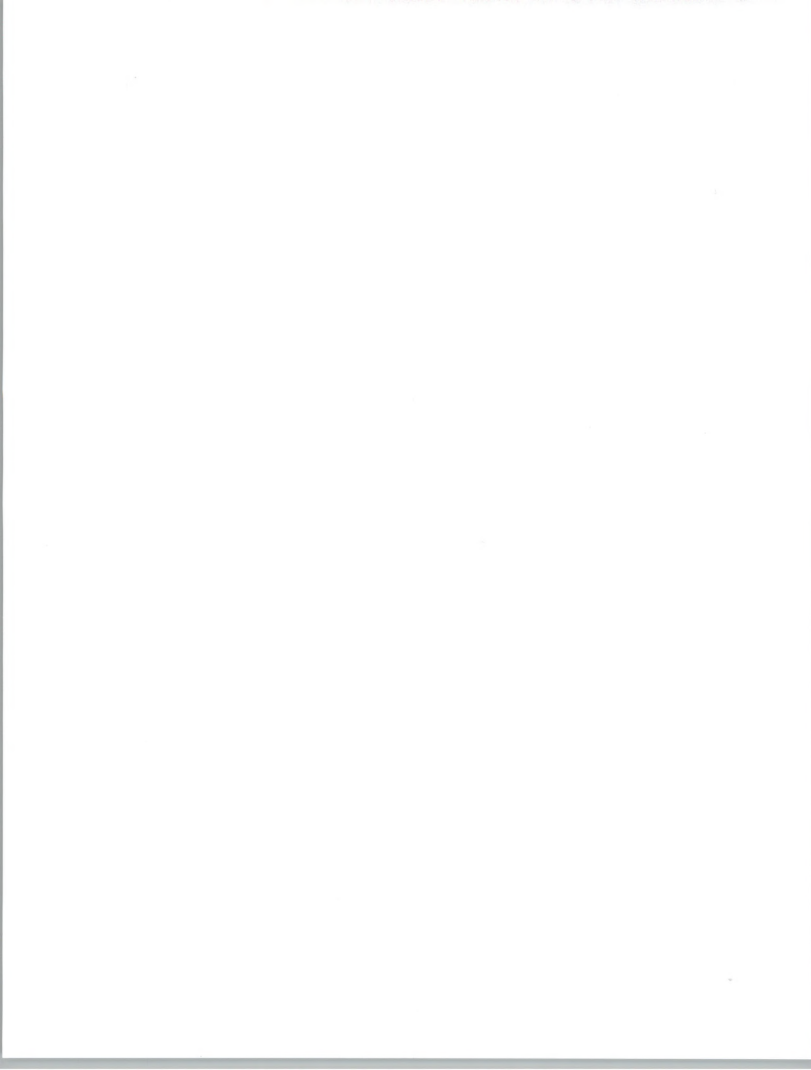


**European Opportunities
in Client/Server
Information Services**

Peter Lines
Managing Director
INPUT—Europe



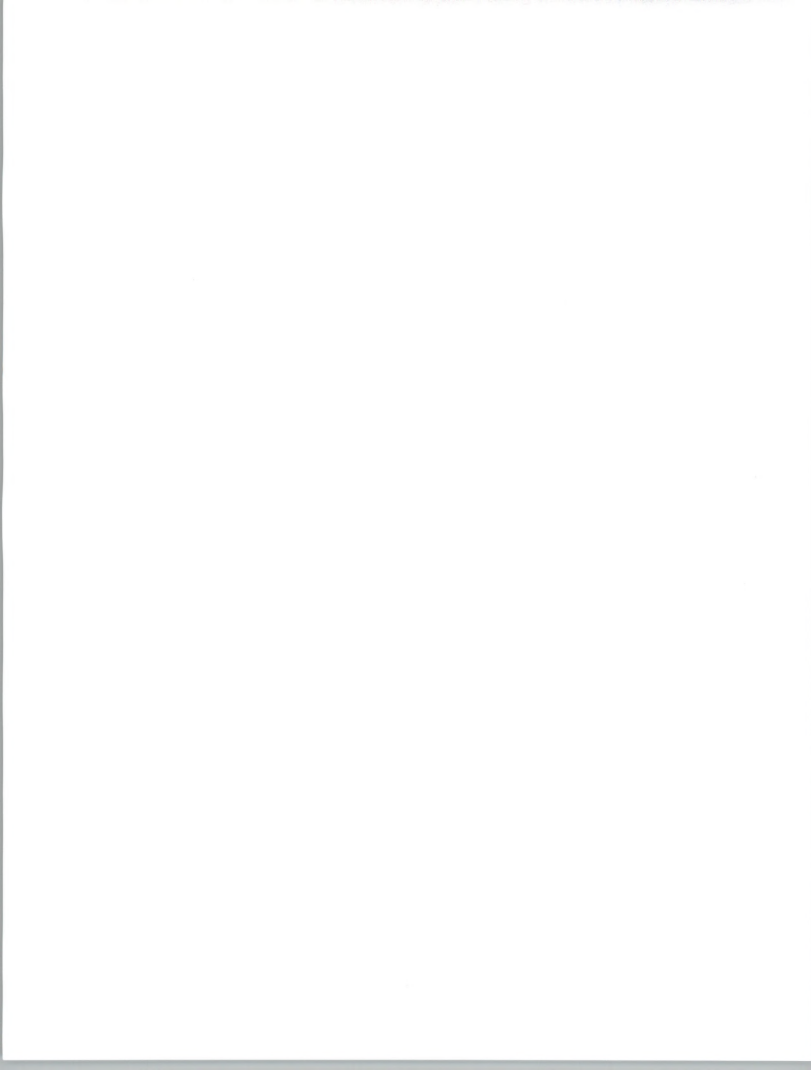
European Client/Server Markets

- Economic/political environment
- User community impacts
- Five-year market forecasts
- Services industry—year 2000
- Strategies for success

MC3-PL- 3

INPUT

Notes



European Community 1993

- Shattered vision and economic difficulties create new environment for IT decisions

MC3-PL- 4

INPUT

Notes

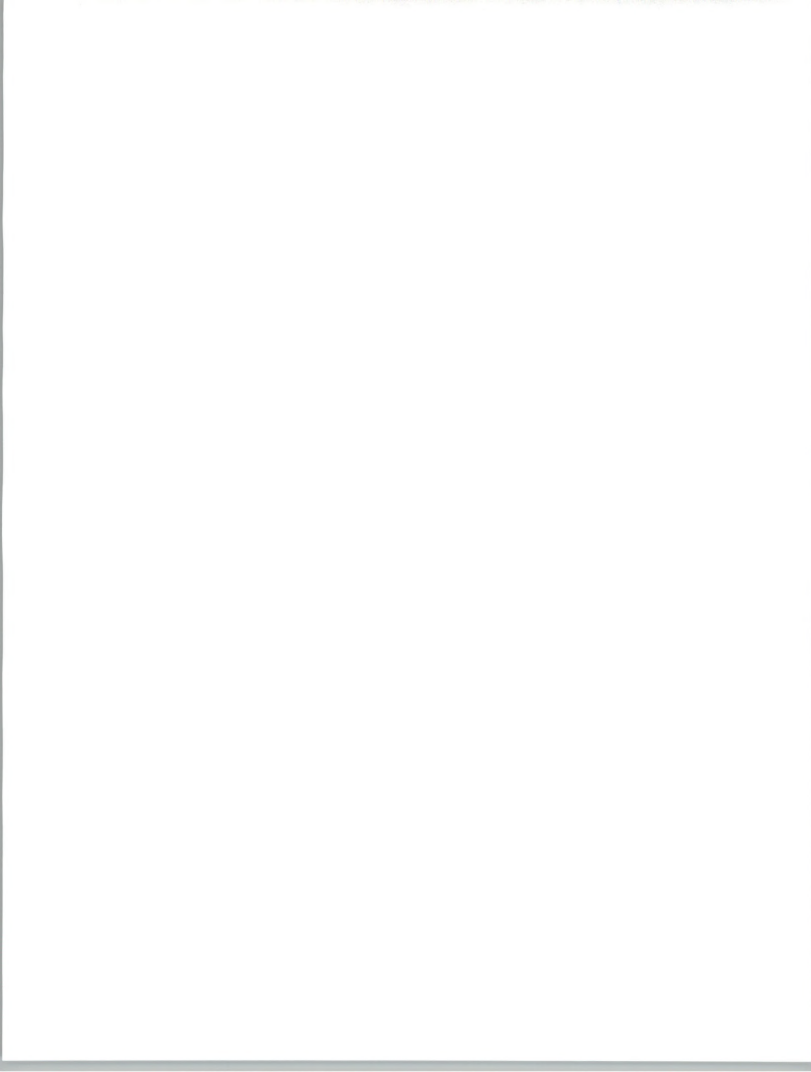
European IT Users

- Demand client/server applications
- Require support and services
- Drive IT expenditure externally

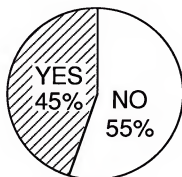
MC3-PL- 5

INPUT

Notes

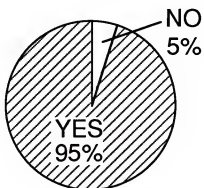


European Client/Server Implementation Plans



Currently implementing

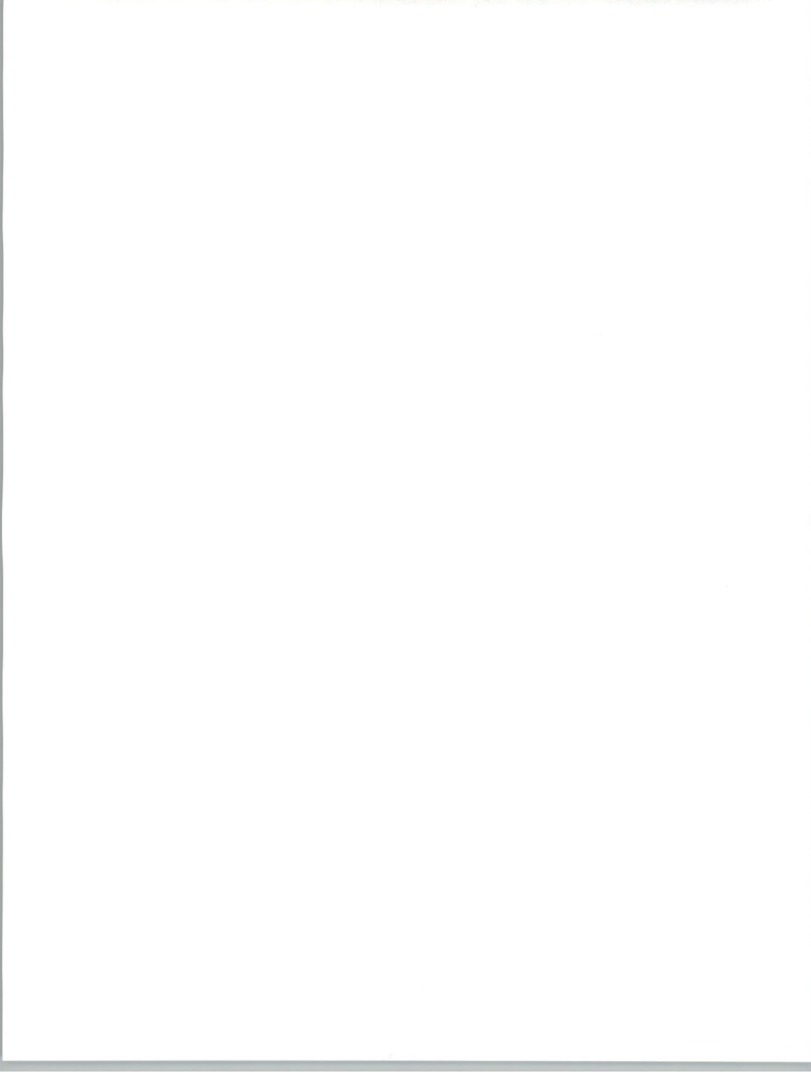
MC3-PL- 6



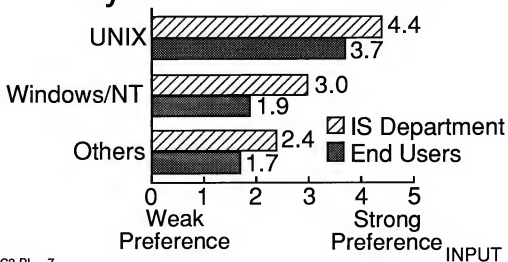
Within next 2 years

INPUT

Notes

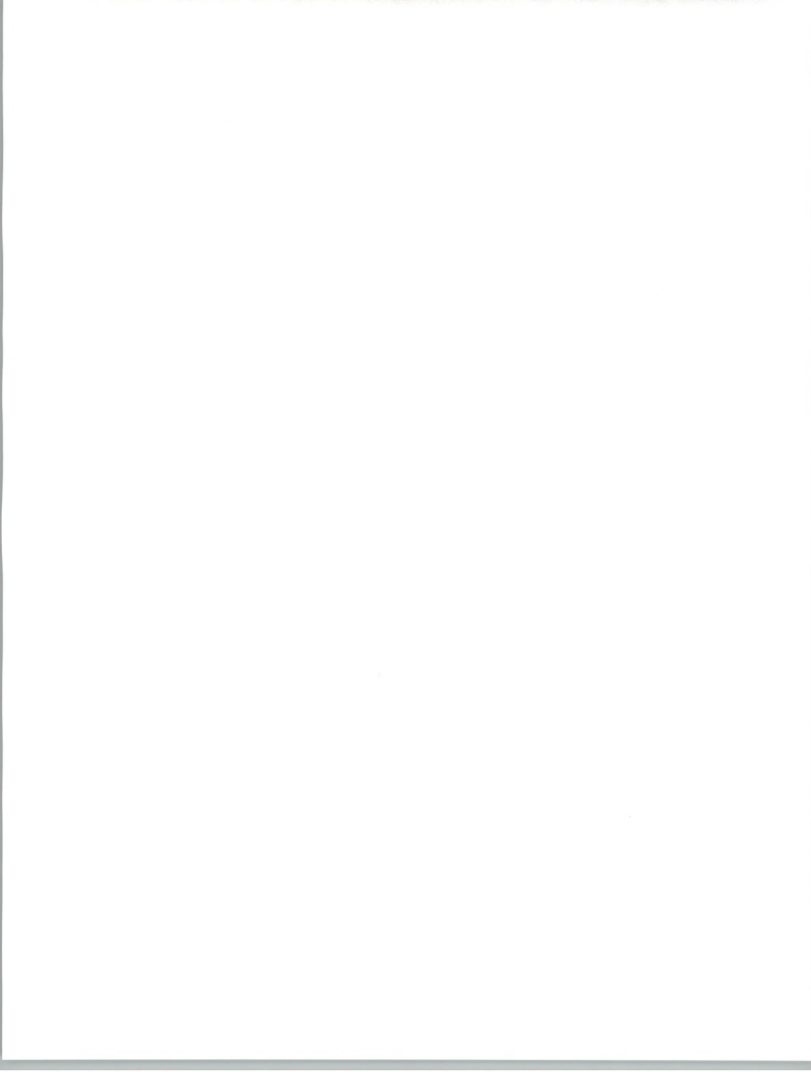


European Operating System Preferences

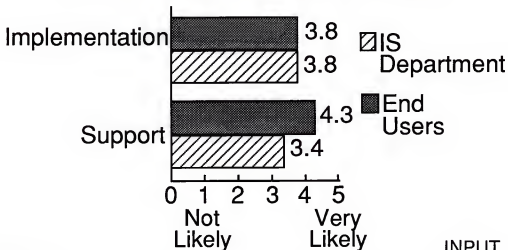


MC3-PL- 7

Notes



European User Need for Client/Server Services



MC3-PL- 8

INPUT

Notes

the 1990s, the number of people aged 65 and over in the United States is projected to increase from 20 million in 1990 to 35 million in 2010 (U.S. Census Bureau 1996). The number of people aged 75 and over is projected to increase from 10 million in 1990 to 18 million in 2010 (U.S. Census Bureau 1996).

As the number of people aged 65 and over increases, the number of people aged 75 and over increases at a faster rate. The number of people aged 75 and over is projected to increase from 10 million in 1990 to 18 million in 2010 (U.S. Census Bureau 1996). The number of people aged 75 and over is projected to increase from 10 million in 1990 to 18 million in 2010 (U.S. Census Bureau 1996).

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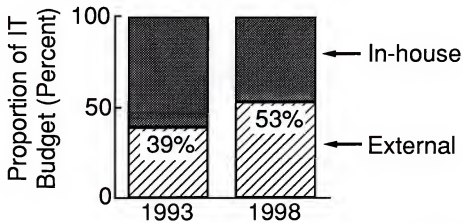
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European IT Spending Changes



MC3-PL- 9

INPUT

Notes

European Client/Server Markets

- Software product brand leaders scale up
- Open competition for client/server projects
- Transition costs fuel outsourcing

MC3-PL- 10

INPUT

Notes



European Software and Services Market C/S Impact

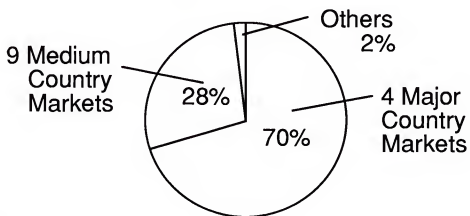
Sector	1993-1998 CAGR (%)	1998 Market Proportion (%)
C/S	+43	65
Non C/S	-9	15

MC3-PL- 11

INPUT

Notes

European Market Analysis 1993

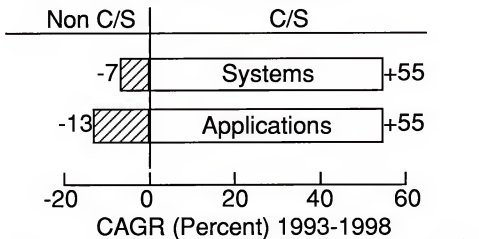


MC3-PL- 12

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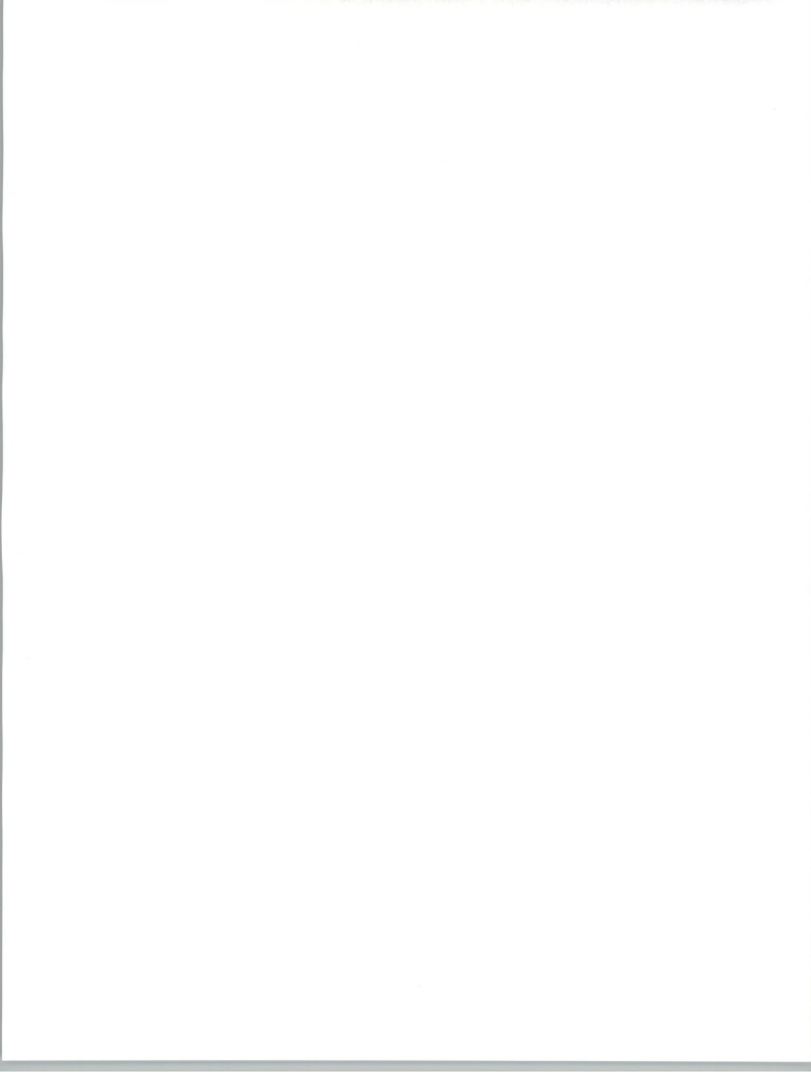
Notes

European Software Products Market Growth

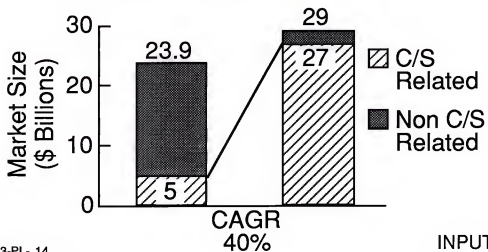


MC3-PL- 13

Notes



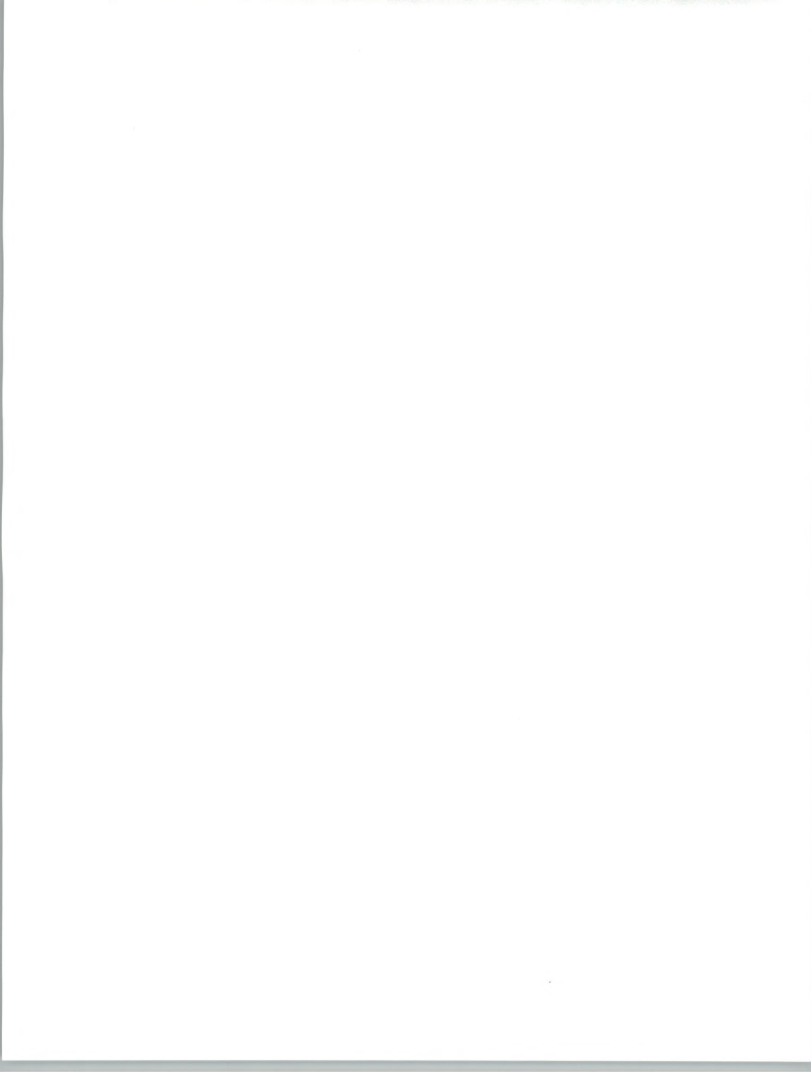
European Professional Services Market



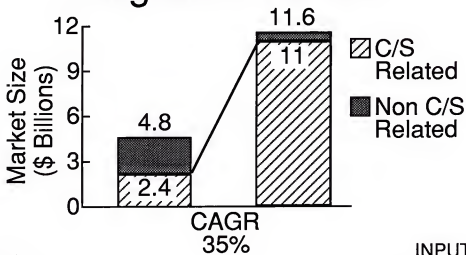
MC3-PL- 14

Notes

9/27/93



European Systems Integration Market



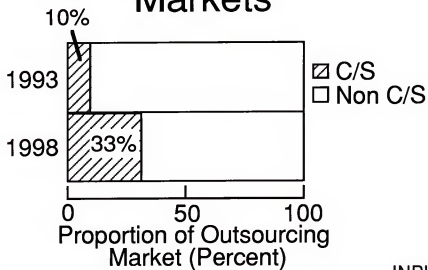
MC3-PL- 15

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Notes



European Outsourcing Markets

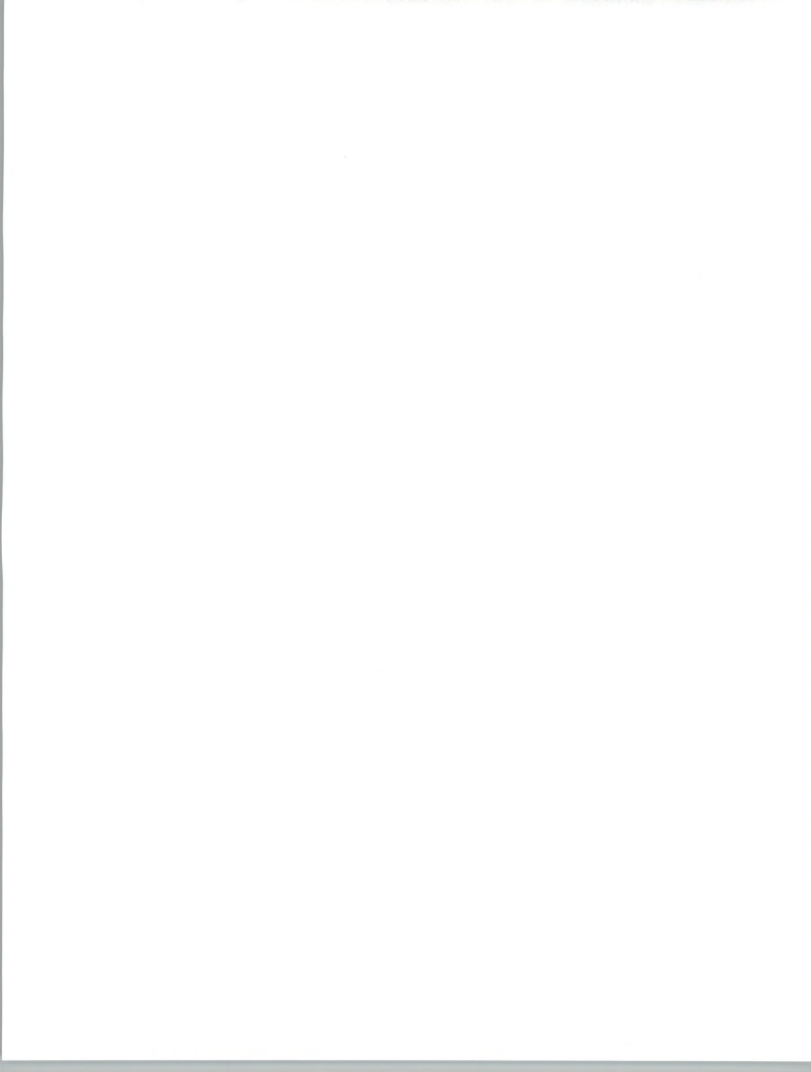


MC3-PL- 16

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Notes

9/27/93



The European Information Services Industry—2000

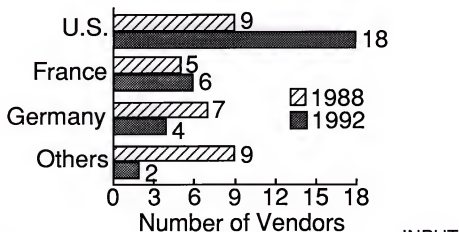
- U.S. vendors strengthening market position
- Mid-sized firms challenged

MC3-PL- 17

INPUT

Notes

Top 30 Software Product Vendors Europe



MC3-PL- 18

INPUT

Notes

the 1990s, the number of people in the world who are under 15 years of age has increased from 1.1 billion to 1.5 billion. This increase is due to the fact that the number of children under 15 years of age has increased in every country in the world, and the increase is particularly large in developing countries.

The increase in the number of children under 15 years of age has led to a corresponding increase in the number of children who are in need of education. In 1990, there were 1.1 billion children under 15 years of age in the world, and 1.1 billion children were in need of education. In 2000, there were 1.5 billion children under 15 years of age in the world, and 1.5 billion children were in need of education.

The increase in the number of children in need of education has led to a corresponding increase in the number of children who are out of school. In 1990, there were 1.1 billion children in need of education, and 1.1 billion children were out of school. In 2000, there were 1.5 billion children in need of education, and 1.5 billion children were out of school.

The increase in the number of children out of school has led to a corresponding increase in the number of children who are illiterate. In 1990, there were 1.1 billion children out of school, and 1.1 billion children were illiterate. In 2000, there were 1.5 billion children out of school, and 1.5 billion children were illiterate.

The increase in the number of children who are illiterate has led to a corresponding increase in the number of children who are unable to read and write. In 1990, there were 1.1 billion children who were illiterate, and 1.1 billion children were unable to read and write. In 2000, there were 1.5 billion children who were illiterate, and 1.5 billion children were unable to read and write.

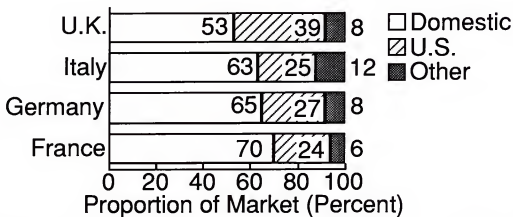
The increase in the number of children who are unable to read and write has led to a corresponding increase in the number of children who are unable to find and use information. In 1990, there were 1.1 billion children who were unable to read and write, and 1.1 billion children were unable to find and use information. In 2000, there were 1.5 billion children who were unable to read and write, and 1.5 billion children were unable to find and use information.

The increase in the number of children who are unable to find and use information has led to a corresponding increase in the number of children who are unable to participate in the global economy. In 1990, there were 1.1 billion children who were unable to find and use information, and 1.1 billion children were unable to participate in the global economy. In 2000, there were 1.5 billion children who were unable to find and use information, and 1.5 billion children were unable to participate in the global economy.

The increase in the number of children who are unable to participate in the global economy has led to a corresponding increase in the number of children who are unable to improve their living standards. In 1990, there were 1.1 billion children who were unable to participate in the global economy, and 1.1 billion children were unable to improve their living standards. In 2000, there were 1.5 billion children who were unable to participate in the global economy, and 1.5 billion children were unable to improve their living standards.

The increase in the number of children who are unable to improve their living standards has led to a corresponding increase in the number of children who are unable to live a decent life. In 1990, there were 1.1 billion children who were unable to improve their living standards, and 1.1 billion children were unable to live a decent life. In 2000, there were 1.5 billion children who were unable to improve their living standards, and 1.5 billion children were unable to live a decent life.

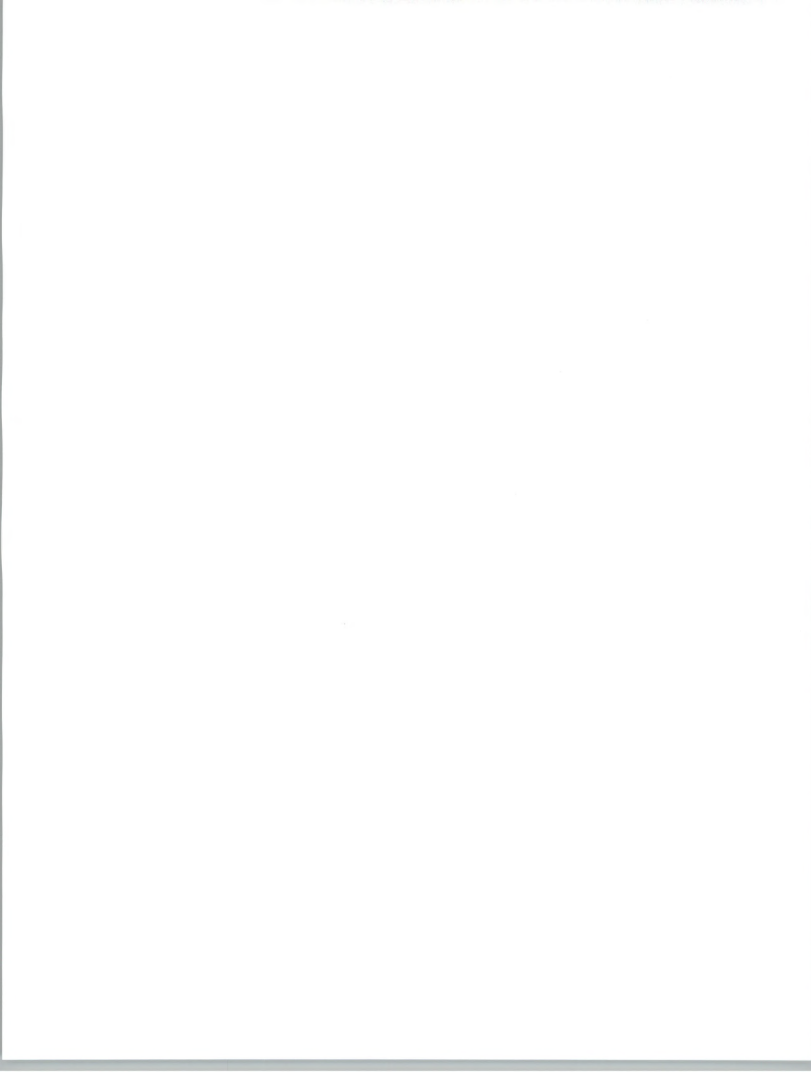
European Market Shares Information Services 1992



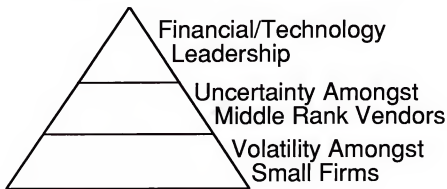
MC3-PL- 19

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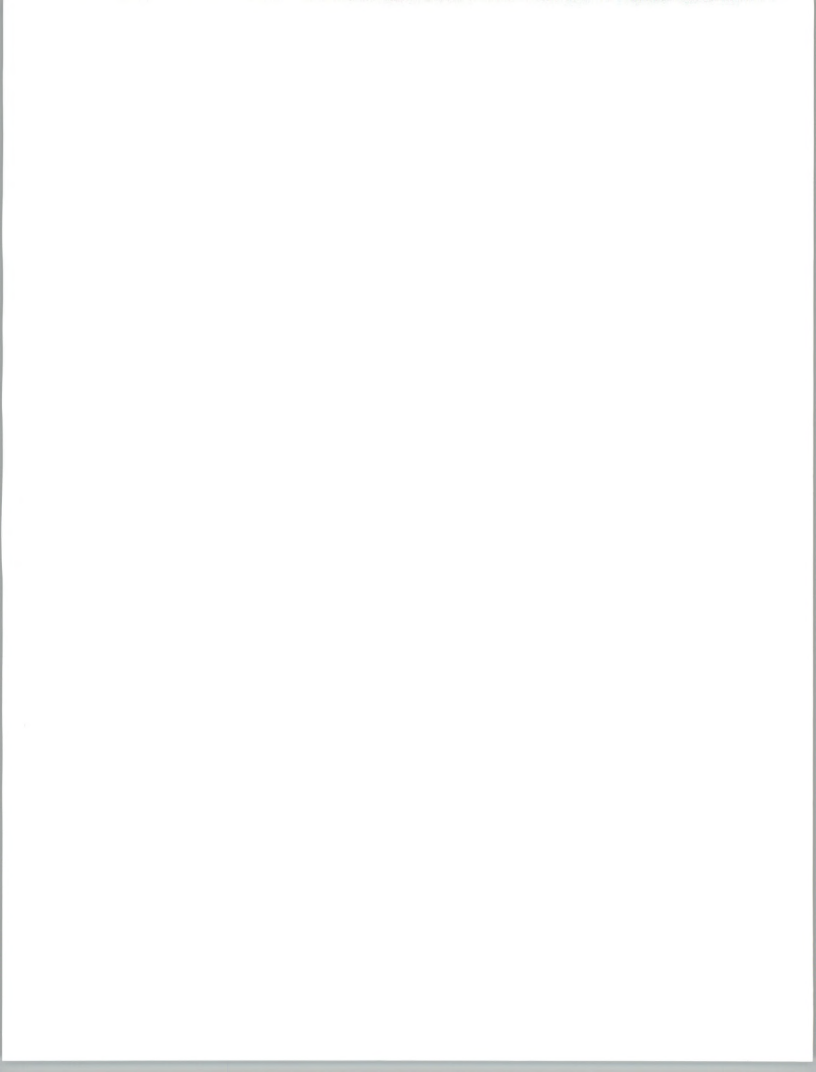
European Info. Services Industry Structure



MC3-PL- 20

INPUT

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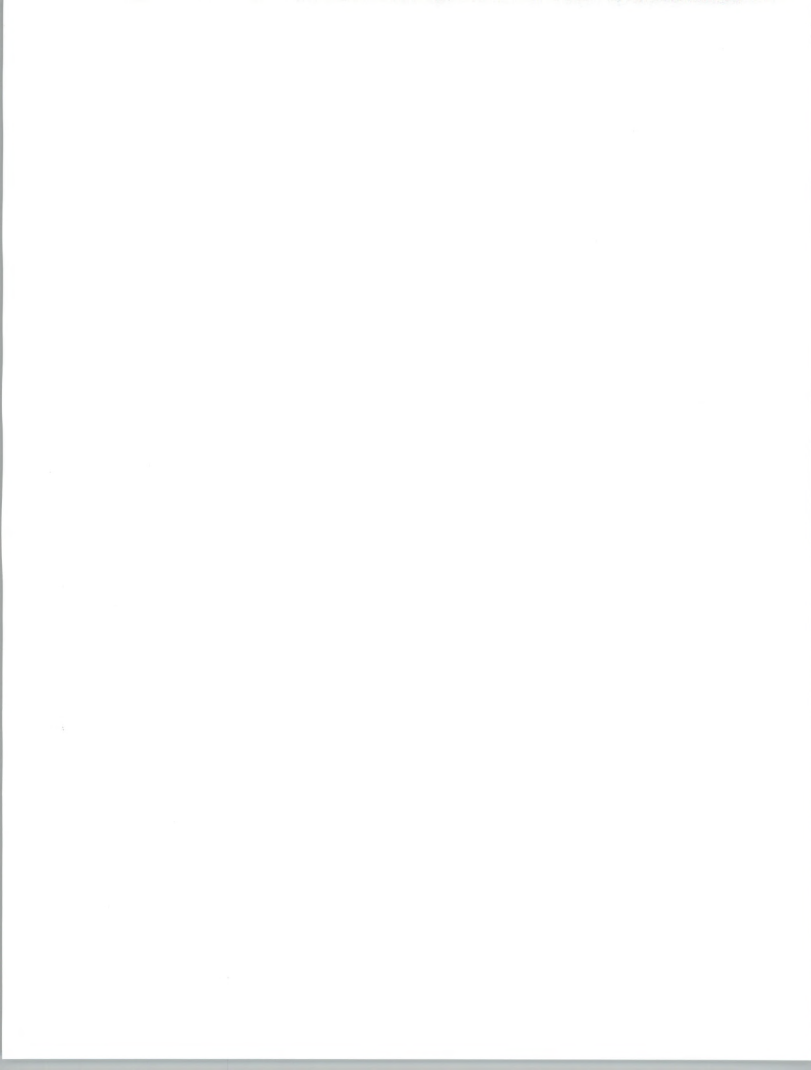
European Success Strategies Built on:

- U.S. products
- U.S. experience
- European resources

MC3-PL- 21

INPUT

Notes





of the model. The model is based on the following assumptions:

- (1) The system is a closed system with no inflow or outflow of matter.
- (2) The system is in a steady state, meaning that the total amount of matter in the system is constant over time.
- (3) The system is homogeneous, meaning that the composition of matter is uniform throughout the system.
- (4) The system is isotropic, meaning that the properties of the system are the same in all directions.

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PETER LINES
VICE PRESIDENT
MANAGING DIRECTOR

PROFILE

CAPABILITIES

- Peter Lines has twenty-five years of experience in the computer industry. He currently has responsibility for all of INPUT's European Programme research and custom consulting. He specializes in analysis and forecasting of major trends in the computer software and services business in Western Europe.

BACKGROUND

- With INPUT since 1983, Mr. Lines originally set up the Western European Market Analysis Programme for the computer software and services business. Subsequently he took management responsibility for all research in Europe, including INPUT's Customer Services Programme and custom consulting assignments. Mr. Lines became a Director of INPUT, Ltd. on the 1st January 1988.
- Prior to INPUT, he was with Sperry Computer Systems' U.K. subsidiary where he held a variety of posts, including those of Regional Software Support Manager, Regional Marketing Support Manager and Marketing Planning Manager.
- Mr. Lines commenced his career in the computer industry in 1966 with English Electric Computers (subsequently ICL), as a systems analyst.

EDUCATION

- B.Sc. (Economics), London School of Economics

