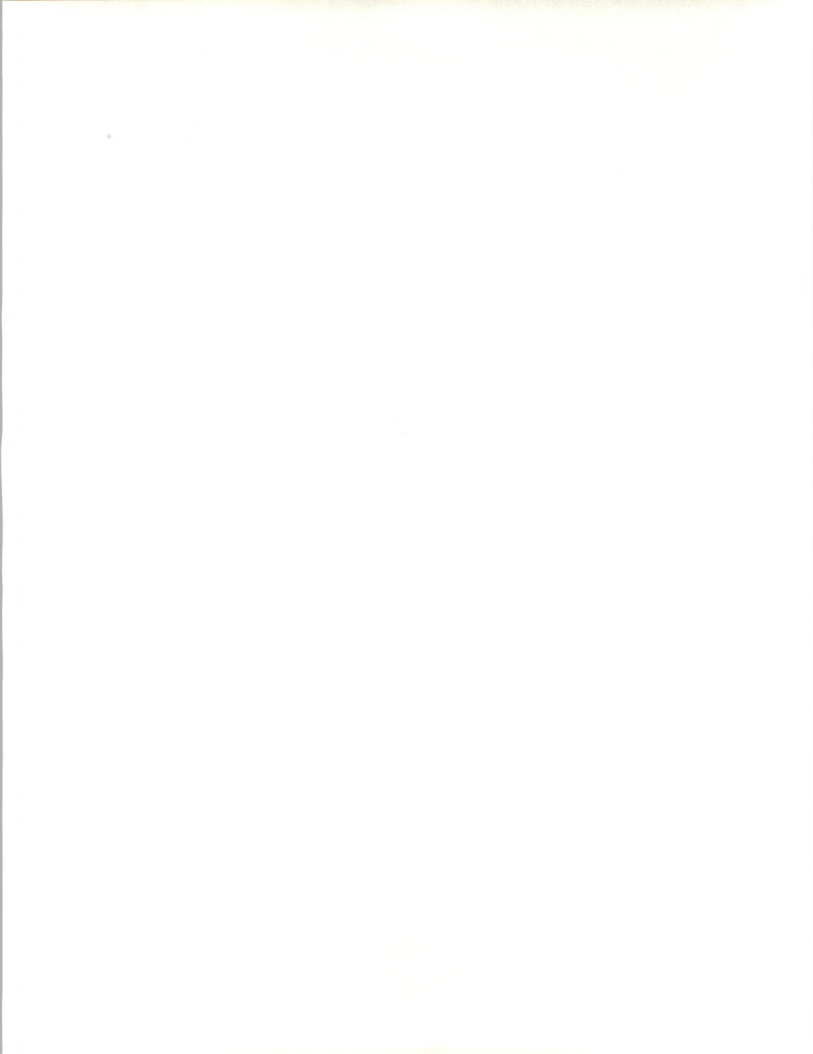
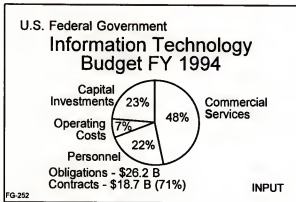


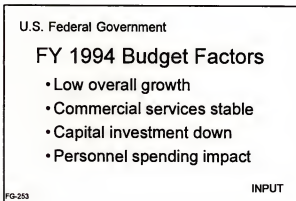
Federal IT Market Forecast, 1994-1998

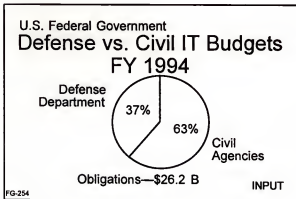
Robert Deller
Vice President
INPUT

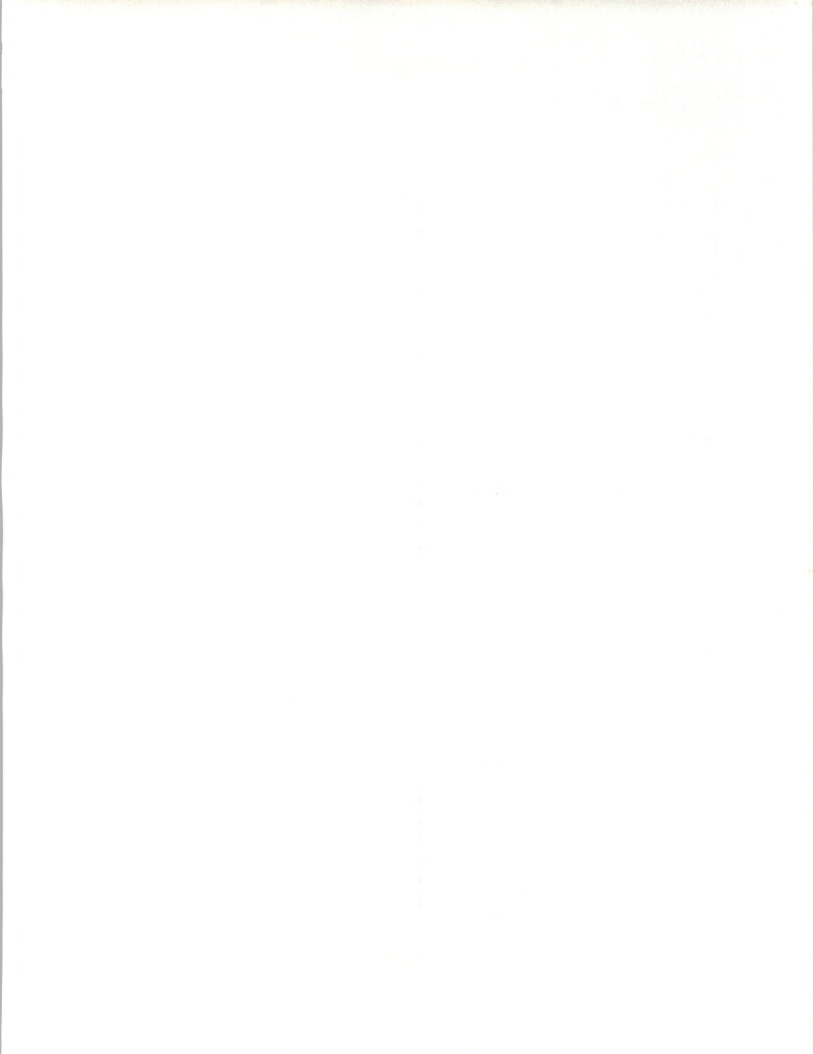


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U.S. Federal Government

Defense vs. Civil Budgets

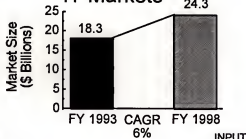
- Defense IT less than half
- Key near-term hardware buys
- Most key opportunities in civil
- Defense decline to continue

FG-255

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U.S. Federal Government

IT Markets



FG-256

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U.S. Federal Government

Information Technology Market Factors

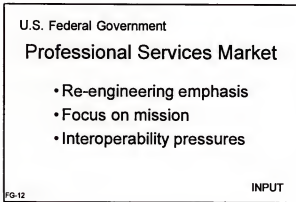
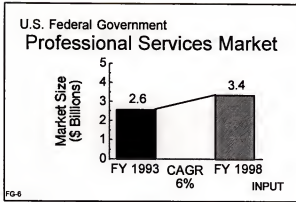
- IT productivity emphasis
- Business process re-engineering
- Government-wide reforms
- Use of IDIQ procurement

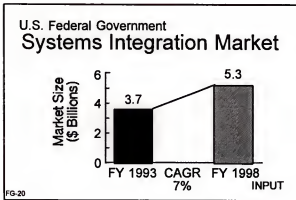
FG-2

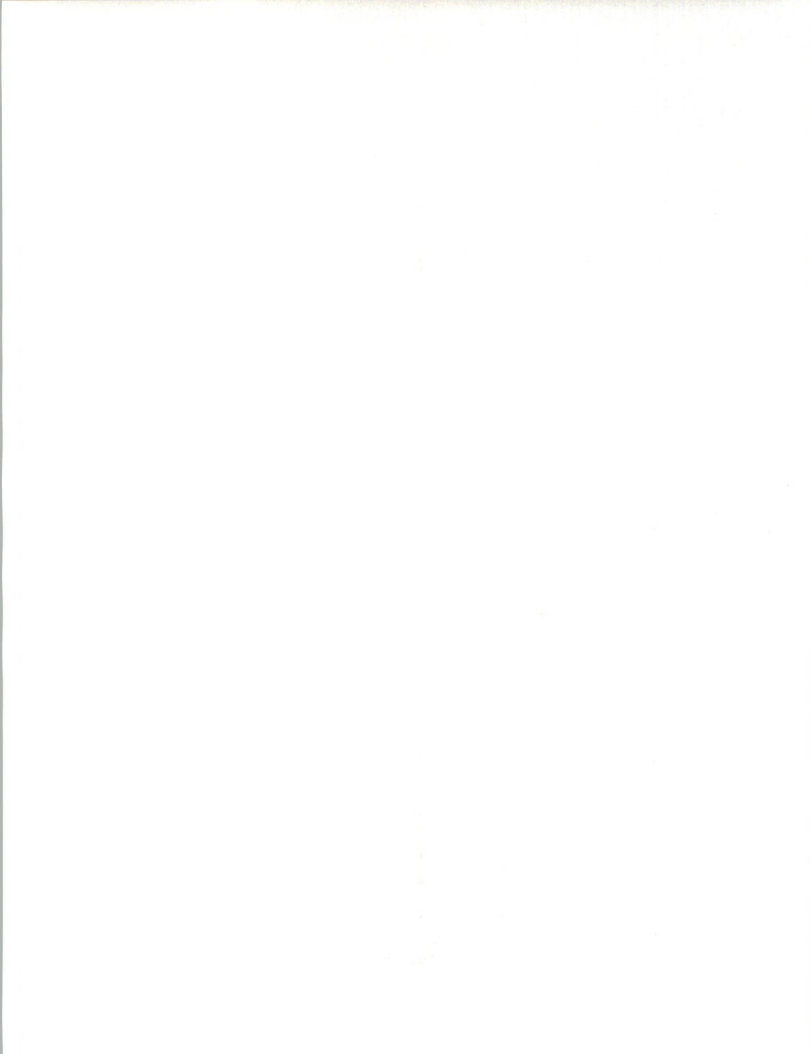
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U.S. Federal Government

Systems Integration Market

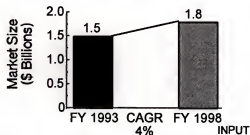
- Delayed program implementation
- Stable professional services
- Increased software products
- Increased competition
- Defense reduction impact

FG-23

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U.S. Federal Government

Outsourcing Market



FG-31

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Outsourcing Market

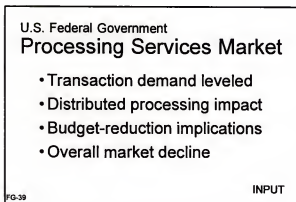
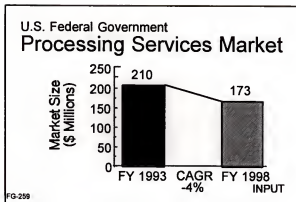
- Long-term prospects
- Mission contracting
- In-house staff retention
- Service cutbacks likely

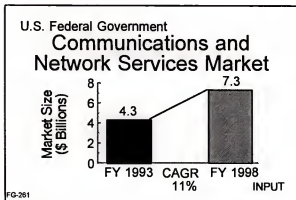
FG-33

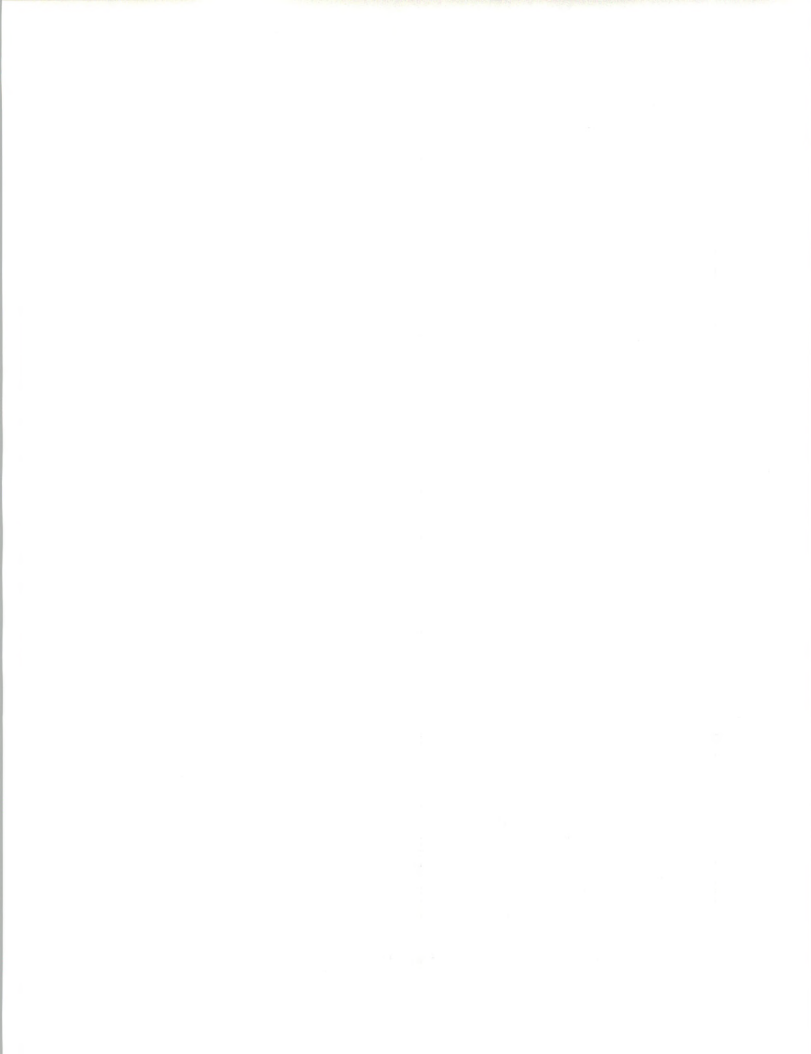
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Communications and Network Services Market

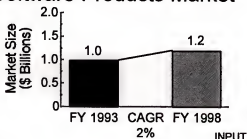
- Separation of voice and data
- Plans for data highway
- Halt in vendor-provided information services
- Network services growth

FG-262

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U.S. Federal Government

Software Products Market



FG-44

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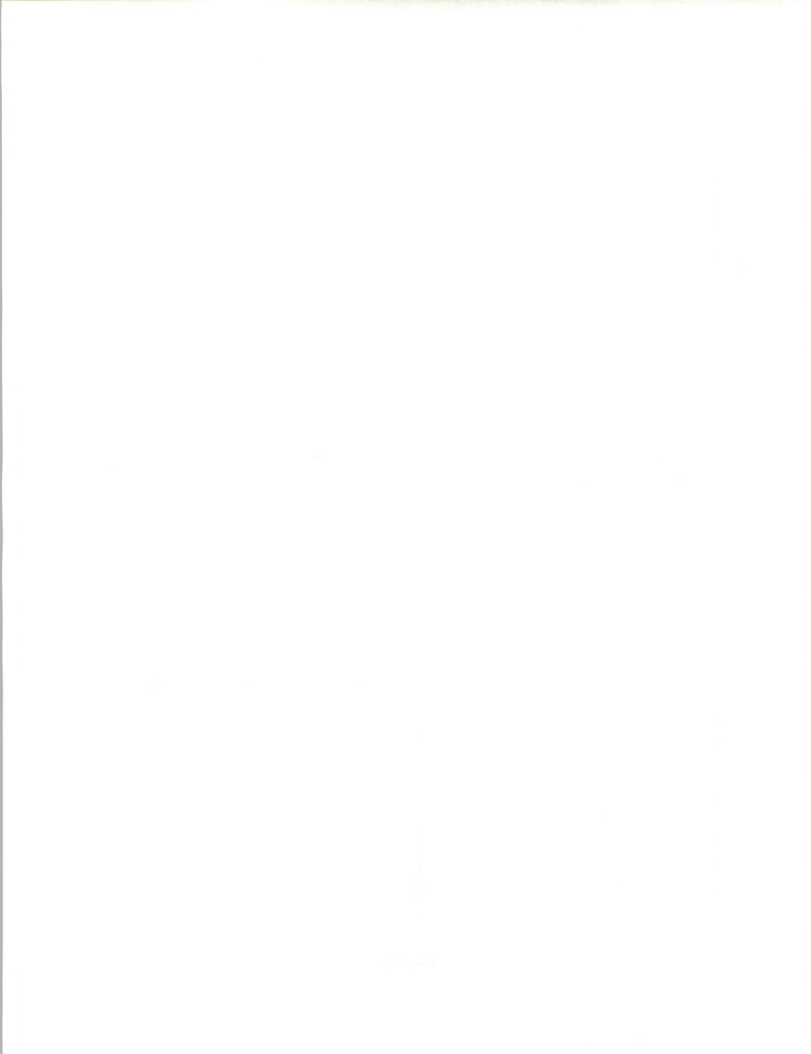
U.S. Federal Government

Software Products Market

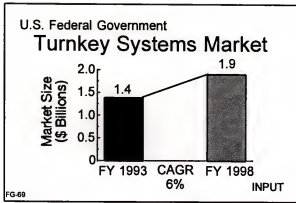
- Requirements contracts impact
- Continued applications emphasis
- Standardized applications impact
- Software re-use in DoD
- Pricing impacts

FG-46

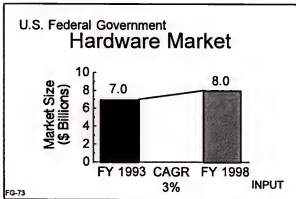
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- U.S. Federal Government
Turnkey Systems Market
- Demand steady
 - Engineering applications lead
 - Document handling second
 - New financial applications
- INPUT
- FG-70





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U.S. Federal Government

Hardware Market

- Growing workstation market
- Application downsizing trends
- Requirements contracts impact
- Networking hardware
- Supercomputer growth

FG-74

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U.S. Federal Government

Conclusions

- Mission support emphasis
- Civilian market prospects
- Increased competition
- New technology initiatives
- Shift in agency priorities

FG-263

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