

**INPUT®**

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**EUROPEAN  
INDUSTRY DIRECTIONS  
AND  
FORECASTS**

**Peter Lines  
Principal Consultant  
INPUT**

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**EUROPE/USA COMPARISON, 1984**  
**(\$ Billions)**

	<b>GDP</b>	<b>INFORMATION SERVICES BUSINESS</b>
<b>United States</b>	<b>\$3,311</b>	<b>\$41.5</b>
<b>West Germany</b>	<b>573</b>	<b>2.4</b>
<b>France</b>	<b>444</b>	<b>3.5</b>
<b>United Kingdom</b>	<b>382</b>	<b>2.5</b>
<b>Italy</b>	<b>297</b>	<b>1.4</b>

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**LEADING EUROPEAN COMPANIES  
INFORMATION SERVICES**

	<b>\$ MILLIONS 1985</b>
<b>CAP GEMINI SOGETI</b>	<b>\$247</b>
<b>SCICON</b>	<b>202</b>
<b>CISI</b>	<b>171</b>
<b>GSI</b>	<b>139</b>
<b>SEMA-METRA</b>	<b>129</b>
<b>DATEV</b>	<b>122</b>
<b>THORN-EMI</b>	<b>117</b>

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**MANUFACTURING PRODUCTIVITY 1988**

	<b>OUTPUT/ HOUR (\$)</b>	<b>ANNUAL GROWTH (Percent)</b>
<b>West Germany</b>	<b>\$20.22</b>	<b>2.5%</b>
<b>France</b>	<b>19.80</b>	<b>3.5</b>
<b>United States</b>	<b>18.21</b>	<b>1.2</b>
<b>Italy</b>	<b>17.72</b>	<b>3.1</b>
<b>Japan</b>	<b>17.61</b>	<b>3.9</b>
<b>United Kingdom</b>	<b>11.34</b>	<b>3.3</b>

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**MOST SERIOUS DP PROBLEMS**

	<b>VERY SERIOUS (Percent)</b>	<b>FAIRLY SERIOUS (Percent)</b>
<b>Management Awareness</b>	<b>20%</b>	<b>30%</b>
<b>Staff Recruitment</b>	<b>15</b>	<b>30</b>
<b>Applications Backlog</b>	<b>10</b>	<b>35</b>
<b>Costs</b>	<b>5</b>	<b>55</b>
<b>Technological Change</b>	<b>-</b>	<b>50</b>

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**MOST IMPORTANT DEVELOPMENTS**

	<b>VERY IMPORTANT (Percent)</b>	<b>UNIMPORTANT (Percent)</b>
<b>Development Centre</b>	<b>35%</b>	<b>20%</b>
<b>Departmental Software</b>	<b>30</b>	<b>10</b>
<b>M-M Links</b>	<b>30</b>	<b>10</b>
<b>Software Production Tools</b>	<b>25</b>	<b>10</b>
<b>UNIX Systems</b>	<b>10</b>	<b>30</b>
<b>Information Centre</b>	<b>10</b>	<b>25</b>

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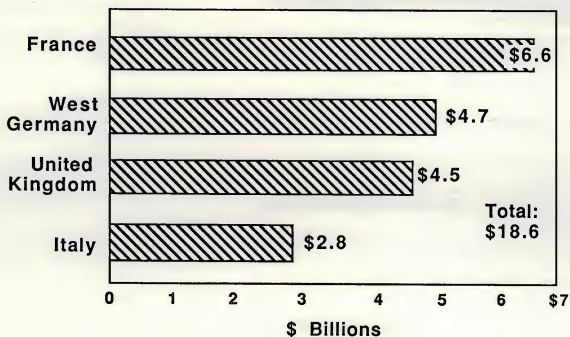
**APPLICATION DEVELOPMENT PRIORITY**

<b>Factory Automation</b>	<b>65%</b>
<b>Accounting</b>	<b>65</b>
<b>Communications Network</b>	<b>55</b>
<b>Marketing/Sales</b>	<b>55</b>
<b>Office Automation</b>	<b>30</b>
<b>Data Base</b>	<b>20</b>

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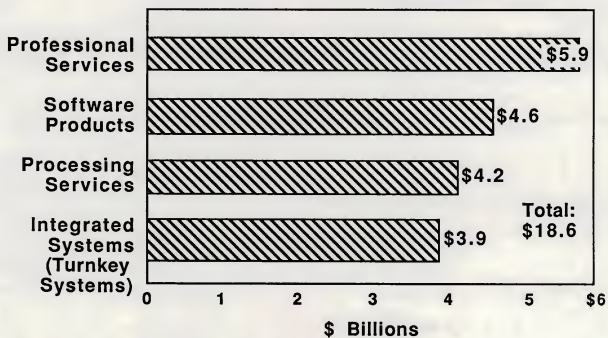
## INFORMATION SERVICES 1986





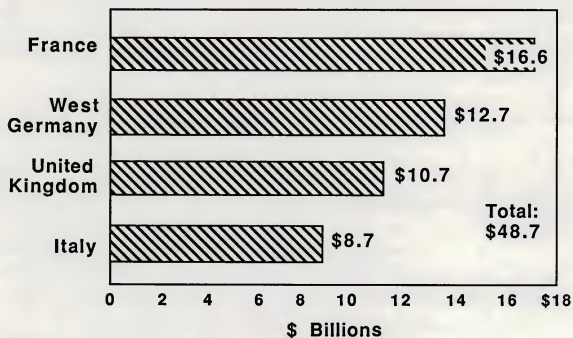


## INFORMATION SERVICES 1986



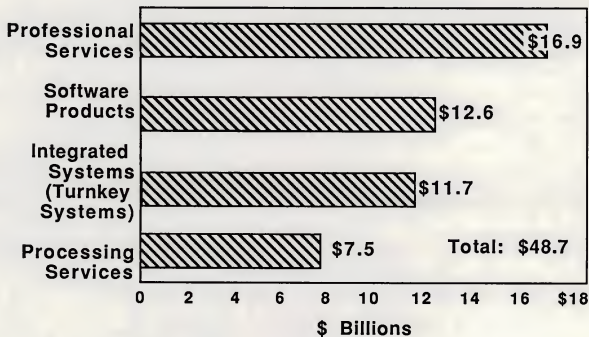


## INFORMATION SERVICES 1991





## INFORMATION SERVICES 1991



1. The first part of the document discusses the importance of maintaining accurate records of all transactions.

2. It is essential to ensure that all entries are supported by appropriate documentation and receipts.

3. Regular audits should be conducted to verify the accuracy of the records and to identify any discrepancies.

4. The second part of the document outlines the procedures for handling disputes and resolving conflicts.

5. It is important to establish clear communication channels and to resolve issues promptly and fairly.

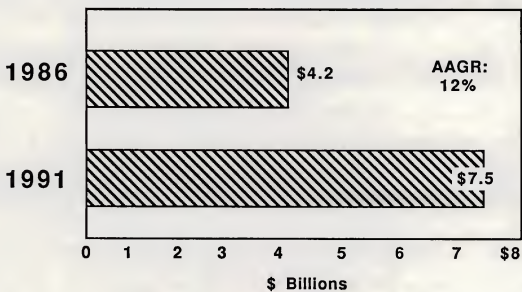
6. The final part of the document provides a summary of the key points and offers recommendations for future actions.

7. It is hoped that these guidelines will help to improve the efficiency and effectiveness of the organization's operations.

8. Thank you for your attention and cooperation in this matter.

9. Sincerely,  
[Signature]

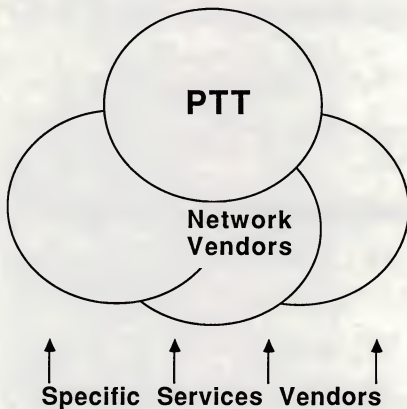
## PROCESSING SERVICES MARKET Four Major European Countries



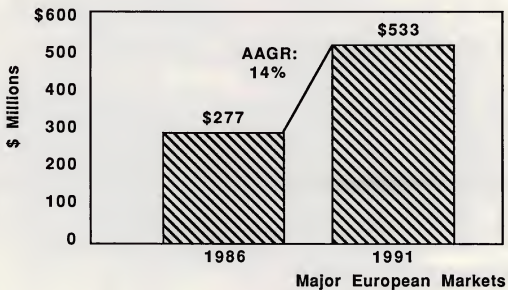




**STRATEGIC DIRECTIONS**





**FACILITIES MANAGEMENT  
A REVITALIZED CONCEPT**



## **FM - THE EUROPEAN PERSPECTIVE**

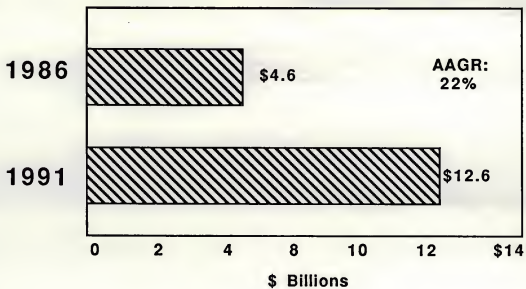
- o France, Largest Market Today, Loses Out to United Kingdom by 1991**
  - o United Kingdom Growth 21% versus France's 10%**
  - o Italy Also Losing Market Share**
  - o West Germany Distrusts FM Concept**
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## SOFTWARE PRODUCTS MARKET Four Major European Countries



the 1990s, the number of people in the UK who are aged 65 and over has increased from 10.5 million to 13.5 million (13.5% of the population).

There is a growing awareness of the need to address the needs of older people, and the Government has set out a strategy for doing so in the White Paper on *Ageing Better: Our Future, Our Choice* (Department of Health 2002). This paper sets out the authors' views on the implications of the White Paper for the development of a new generation of health professionals.

## Background

The White Paper on *Ageing Better: Our Future, Our Choice* (Department of Health 2002) sets out the Government's strategy for addressing the needs of older people. It is a key document in the development of a new generation of health professionals.

The White Paper sets out a number of key principles which will guide the development of a new generation of health professionals. These principles are:

• *Ageing Better: Our Future, Our Choice* (Department of Health 2002) sets out the Government's strategy for addressing the needs of older people. It is a key document in the development of a new generation of health professionals.

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**US ATTITUDE TO AI**

	<b>POSITIVE (Percent)</b>	<b>INTEREST IN NEXT 4 YEARS (Percent)</b>
<b>United Kingdom</b>	<b>60%</b>	<b>15%</b>
<b>West Germany</b>	<b>50</b>	<b>10</b>
<b>France</b>	<b>10</b>	<b>30</b>

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**EXPERT SYSTEM APPLICATIONS  
USER INTEREST**

	<b>HIGH (Percent)</b>	<b>SOME (Percent)</b>
<b>Extension to DP Systems</b>	<b>60%</b>	<b>20%</b>
<b>Intelligent Office</b>	<b>50</b>	<b>20</b>
<b>Extension of Programming</b>	<b>40</b>	<b>40</b>
<b>Education and Training</b>	<b>40</b>	<b>35</b>

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**USER PRIORITIES FOR AI**

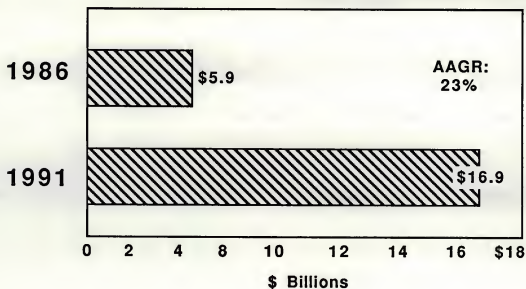
<b>Improved DP Function</b>	<b>30%</b>
<b>Disseminate Expertise</b>	<b>25</b>
<b>Management Support</b>	<b>20</b>
<b>Cost Reduction</b>	<b>15</b>
<b>Employee Productivity</b>	<b>10</b>

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**PROFESSIONAL SERVICES MARKET**  
**Four Major European Countries**







**PROFESSIONAL SERVICES  
DIRECTIONS**

- o Specialization**
  - o Marketing**
  - o Prime Contracting**
  - o Managing Technology**
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1870

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1871

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1872

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1873

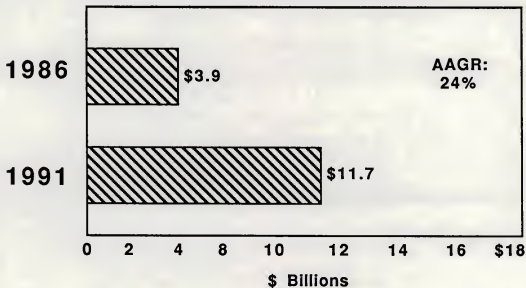
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1874

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1875

## INTEGRATED SYSTEMS MARKET Four Major European Countries





**STRATEGIC DIRECTIONS**

- o Hardware Cost/Performance**
  - o Selling Costs versus Dealer Margins**
  - o Meeting Specialist Needs**
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