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EUROPEAN INDUSTRY DIRECTIONS AND FORECASTS

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EUROPE/USA COMPARISON, 1984
($ Billions)

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

LEADING EUROPEAN COMPANIES INFORMATION SERVICES

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

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MANUFACTURING PRODUCTIVITY 1988

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

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MOST SERIOUS DP PROBLEMS

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

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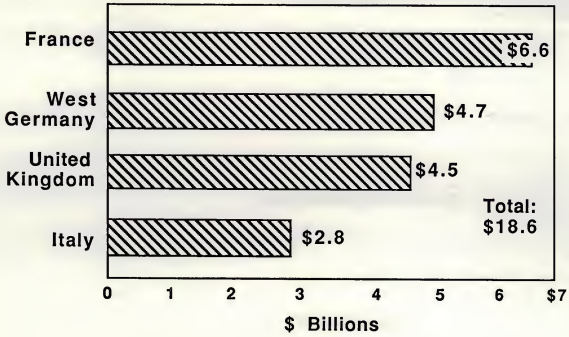
MOST IMPORTANT DEVELOPMENTS

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

APPLICATION DEVELOPMENT PRIORITY

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

INFORMATION SERVICES 1986



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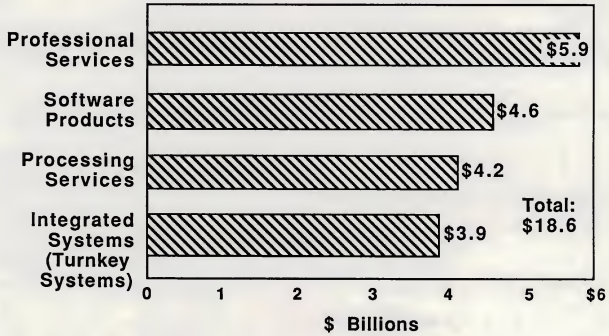
INFORMATION SERVICES 1986



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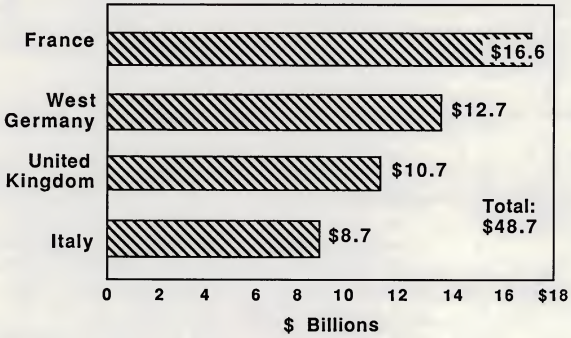
INFORMATION SERVICES 1991



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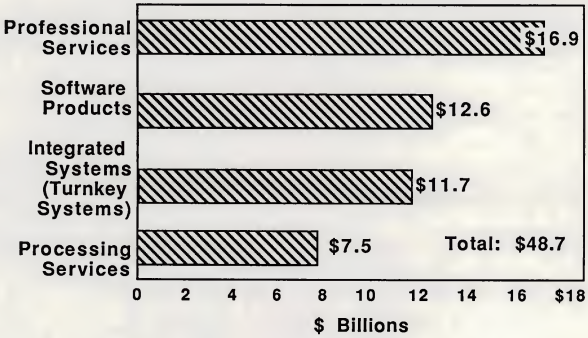
INFORMATION SERVICES 1991



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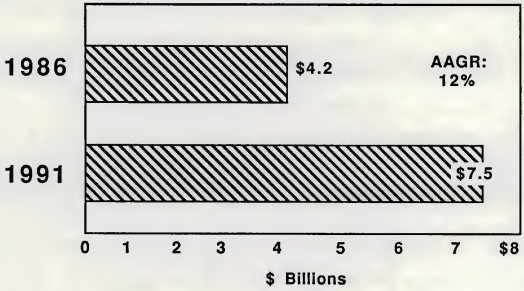
PROCESSING SERVICES MARKET
Four Major European Countries



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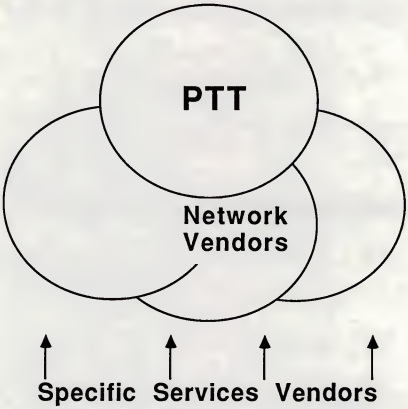
STRATEGIC DIRECTIONS



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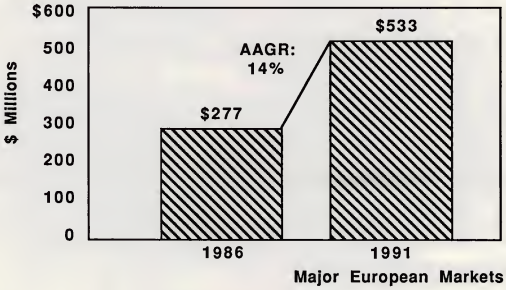
FACILITIES MANAGEMENT
A REVITALIZED CONCEPT



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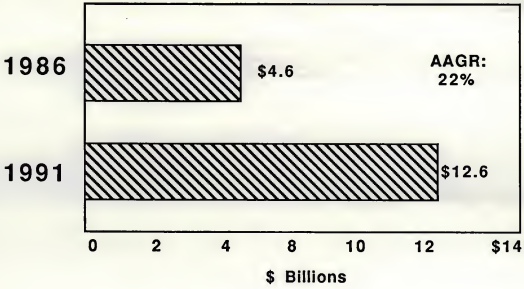
FM - THE EUROPEAN PERSPECTIVE

- 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

SOFTWARE PRODUCTS MARKET
Four Major European Countries



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US ATTITUDE TO AI

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

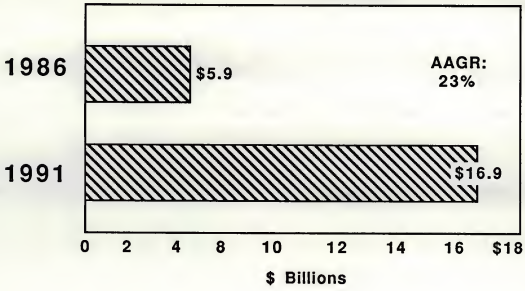
EXPERT SYSTEM APPLICATIONS USER INTEREST

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

USER PRIORITIES FOR AI

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

PROFESSIONAL SERVICES MARKET
Four Major European Countries



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PROFESSIONAL SERVICES DIRECTIONS

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

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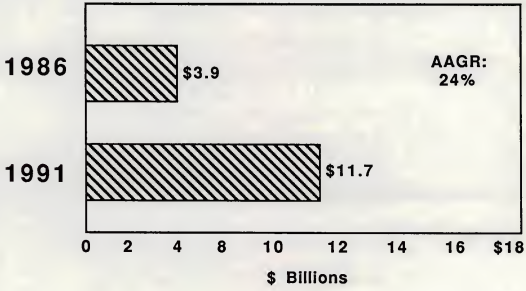
INTEGRATED SYSTEMS MARKET
Four Major European Countries



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STRATEGIC DIRECTIONS

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