

Western Europe

- France/Germany/U.K./Italy
- Scandinavia
- Benelux
- Spain/Portugal
- Austria/Switzerland/Ireland/Greece

E-MS-1

INPUT

Notes

Western Europe

| | | |
|---------|-------------|-------------------|
| Austria | Germany | Norway |
| Belgium | Greece | Portugal |
| Denmark | Ireland | Spain |
| Finland | Italy | Sweden |
| France | Netherlands | Switzerland |
| | | United Kingdom |

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E-MS-2

Notes

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E-MS-3

Notes

5/28/91

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Market Characteristics

- Country markets
- Vertical markets (industry sector)
- Product sectors (delivery modes)

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Notes



Regional Heritage

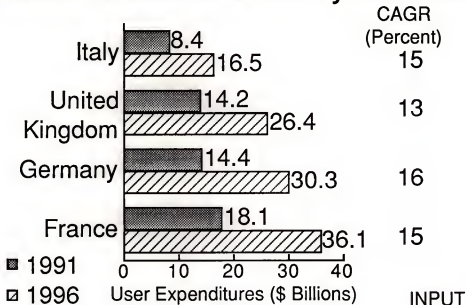
- North Europe
 - Processing services
- Mid-Europe
 - Professional services
- South Europe
 - Software products

E-MS-5

Notes



Relative Sizes of Country Markets

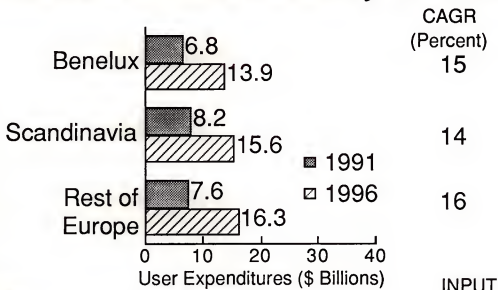


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Notes



Relative Sizes of Country Markets

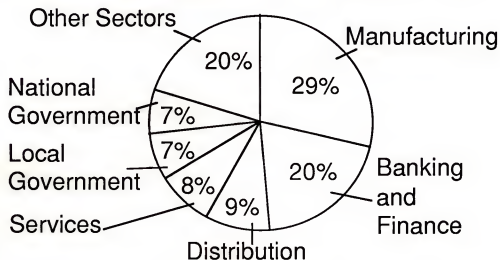


E-MS-7

Notes



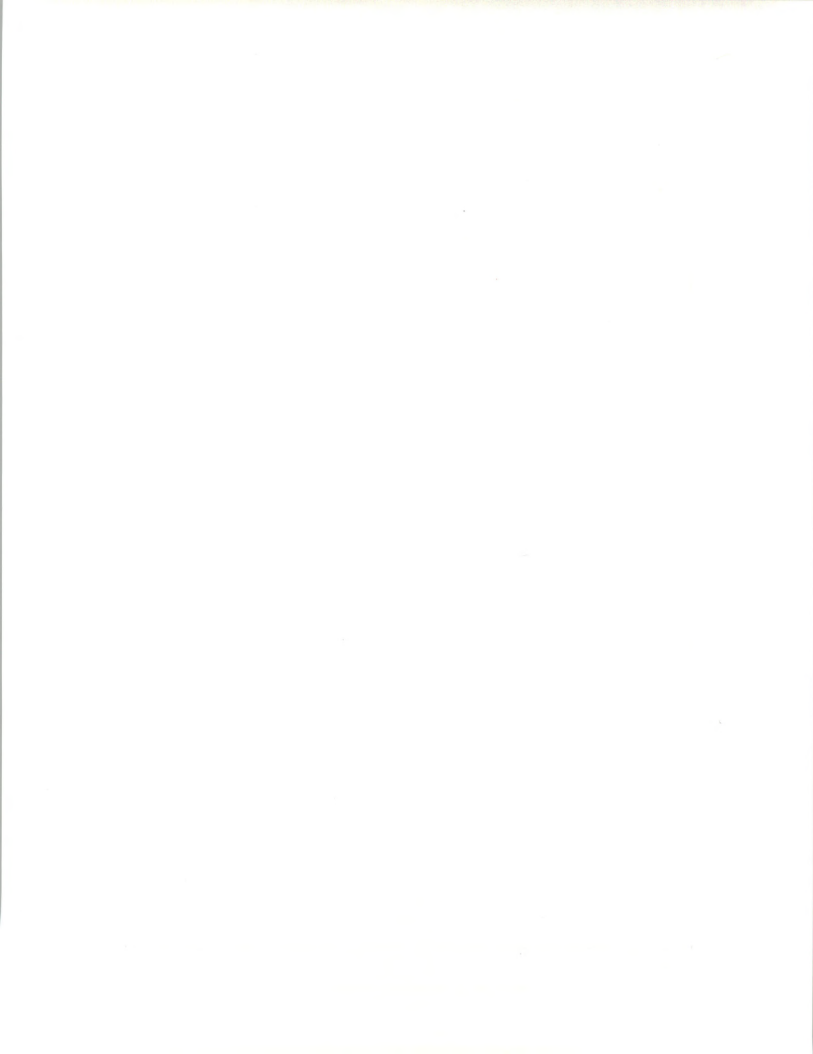
Industry Sectors—Europe, 1991



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1991 Total market = \$77.5 billion INPUT

Notes



Industry Sector Variables

- Europe/global market
- Recession
- Eastern Europe
- Aging population
- Downsizing
- Outsourcing

E-MS-9

Notes



Europe

Software and Services

Workshop Agenda

- New end-user demands
- Fierce competitive pressure
- Lower market forecasts
- Challenge to professional services

E-MS-10

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Notes



Peter Lines

Vice President
INPUT

E-MS-11

Notes



Roger Fulton

Consultant
INPUT

E-MS-12

Notes

