

INPUT

1953 Gallows Road, Suite 560, Vienna VA 22182 (703) 847-6870
Fax (703) 847-6872

FACSIMILE TRANSMITTAL FORM

Date: May 2, 1990
Destination: MT. VIEW
ATTENTION: ANDREA JERRIS
Telephone Number: _____
Facsimile Number: 415-961-3966

From: DOUG WILDER

Number of Pages: 1 of 4

Confidential: Yes _____ No _____

Urgent: Yes _____ No _____

Description: ANDREA, ATTACHED ARE 3 CHART
CHANGES FOR JJSEM. THEY ARE CHART NO'S
JJSEM-1-4, JJSEM-DRW4-10 AND JJSEM-DRW4-21.
THE BOOK FOR JAPAN SHOULD BE 4 CHARTS TO
A PAGE AND IN THE FOLLOWING SEQUENCE,
1. SYSTEMS INTEGRATION - JJSEM-1 THEN JJSEM-1-25
2. NETWORK INTEGRATION - JJSEM-2-1 THEN JJSEM-2-29.
3. IMAGE PROCESSING - JJSEM-DRW4-1 THEN JJSEM-DRW4.
4. PROGRAM MANAGEMENT - JJSEM4-1 THEN JJSEM4-67

.....
INPUT Project Charge Code: _____
File: _____ DOUG
Chron: _____
Contact: _____
Other: _____ (specify) _____

INPUT

1953 Gallows Road, Suite 560, Vienna VA 22182 (703) 847-6870
Fax (703) 847-6872

FACSIMILE TRANSMITTAL FORM

Date: 5/4/90
Destination: M. V.
ATTENTION: ANDREA
Telephone Number: _____
Facsimile Number: _____

From: JOHN E. FRANK

Number of Pages: 1 of 3

Confidential: Yes _____ No

Urgent: Yes _____ No

Description: DESPITE ALL OUR "CARE AND ATTENTION",
WE MISSED TWO CHARTS IN THE ORIGINAL DRAFTS -
PLEASE MAKE 2 REPLACING SLIDES & MASTER B&W
PRINTS AND RETURN ASAP (NEED FOR 5/10 BURST);

INPUT Project Charge Code: _____

File: _____

Chron: _____

Contact: _____

Other: _____ (specify) _____

1870

...

...

...

...

Leading Systems Integration Vendors Vertical Industry Penetration

Vendor	<i>Number of Industries</i>
IBM	13
EDS/GM	10
Andersen Consulting	9
CSC	7
SHL Systemhouse	6

INPUT
SIIRC-JEF-35

Same as JISEMI-20

Notes

Monday 10/10/1910

Friday

10/10/1910
10/11/1910
10/12/1910
10/13/1910
10/14/1910
10/15/1910
10/16/1910
10/17/1910
10/18/1910
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10/26/1910
10/27/1910
10/28/1910
10/29/1910
10/30/1910
10/31/1910

1910

1910

Leading Systems Integration Vendors Vertical Industry Penetration

Vendor	Number of Industries Share (Percent)
AT&T	6
Unisys	5
BCS	5
DEC	5

INPUT
SIIRC-JEF-36

SAME AS JJ SEM 1-21

Notes

1000 MW (1000 MW) (1000 MW) (1000 MW)

Year	1000 MW
1980	1000
1985	1000
1990	1000
1995	1000

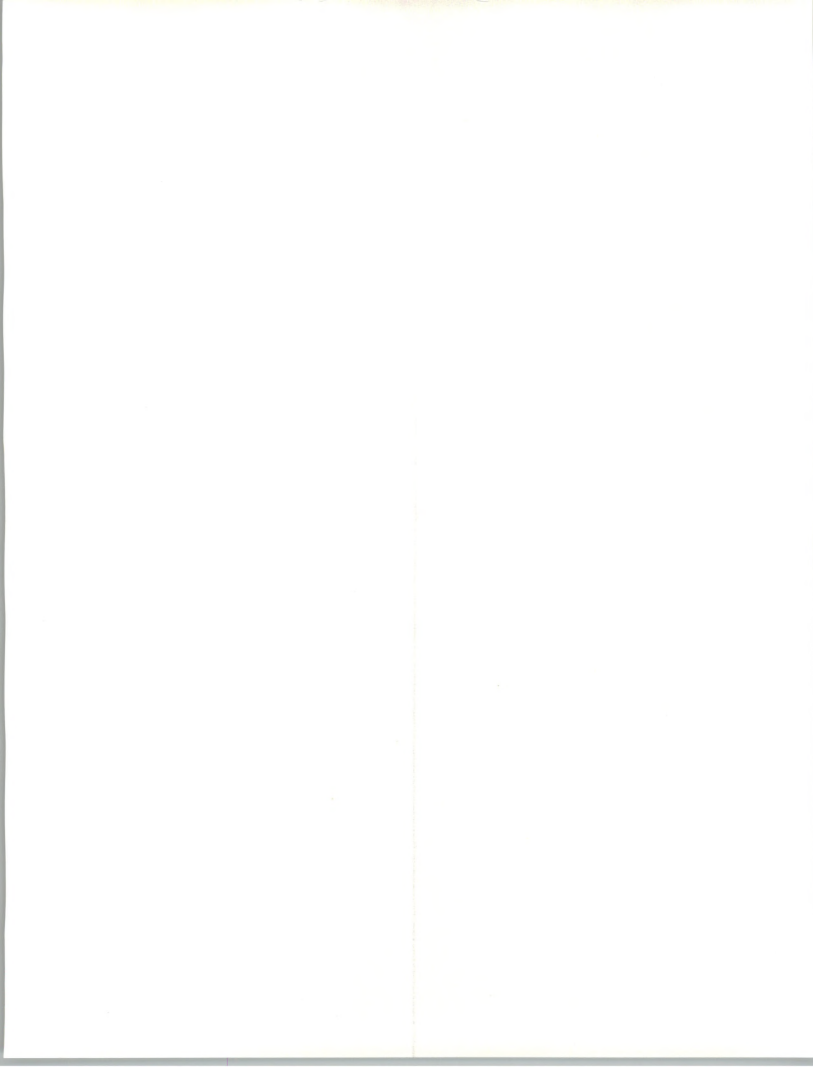
1000 MW

1000 MW



Network Integration

A Growing Opportunity

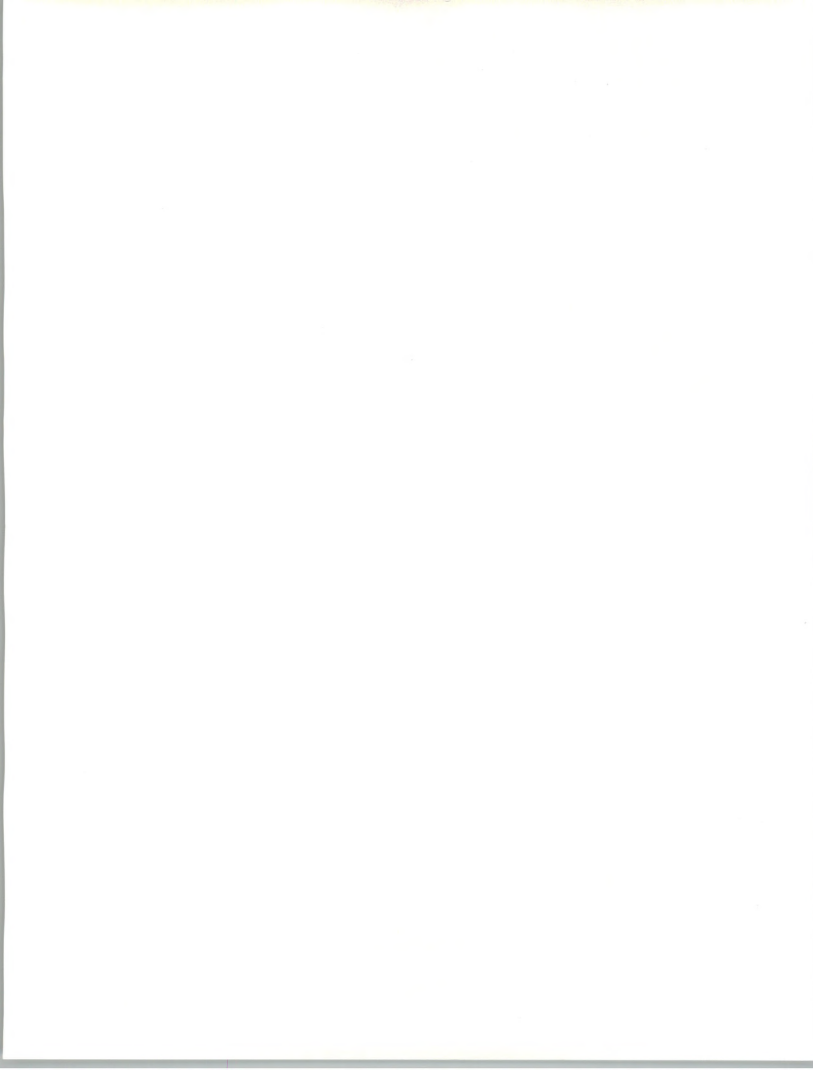


Contents

- Definitions
- Business drivers
- Technology trends
- Market forecast
- Vendors
- Summary

INPUT
JJSEM-2-2

Notes



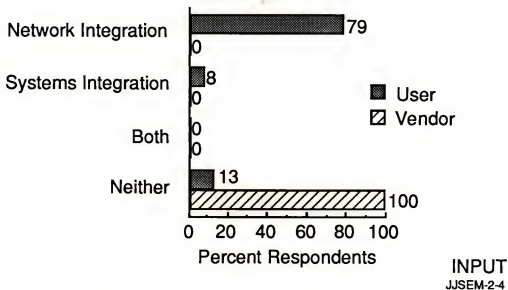
Definitions

INPUT
JSEM-2-3

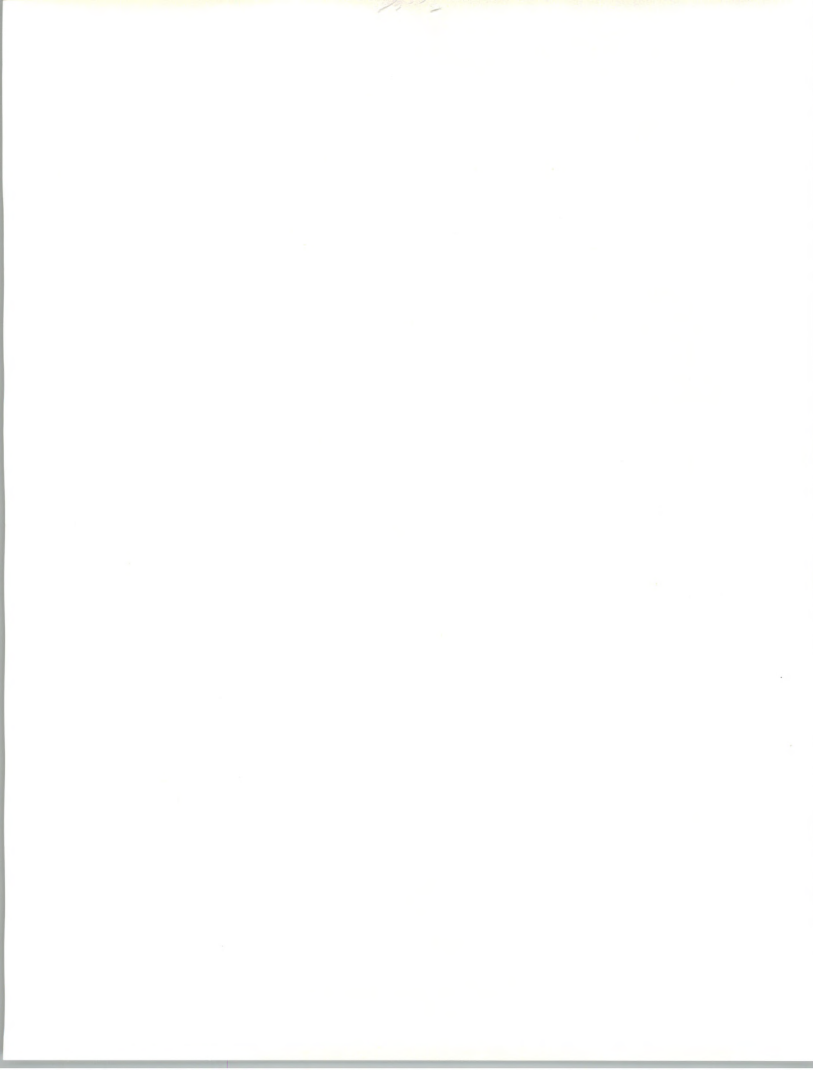
Notes



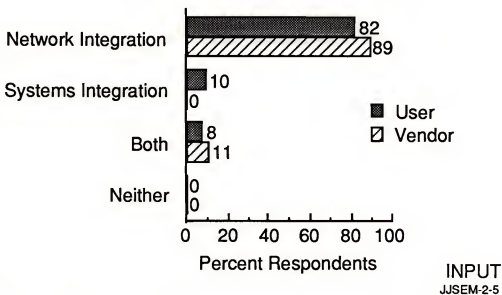
Network Consolidation



Notes



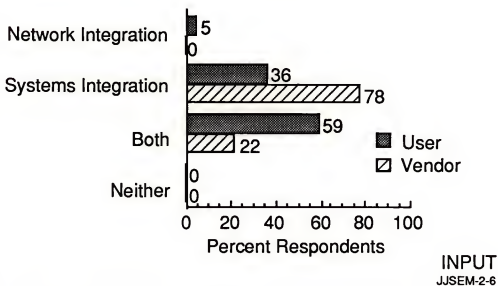
Voice/Data Integration



Notes



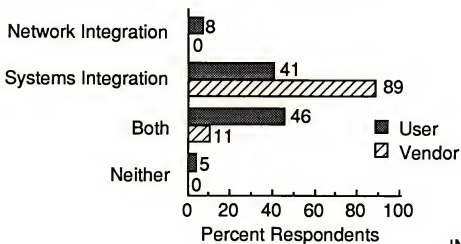
Voice/Data/Application Integration



Notes

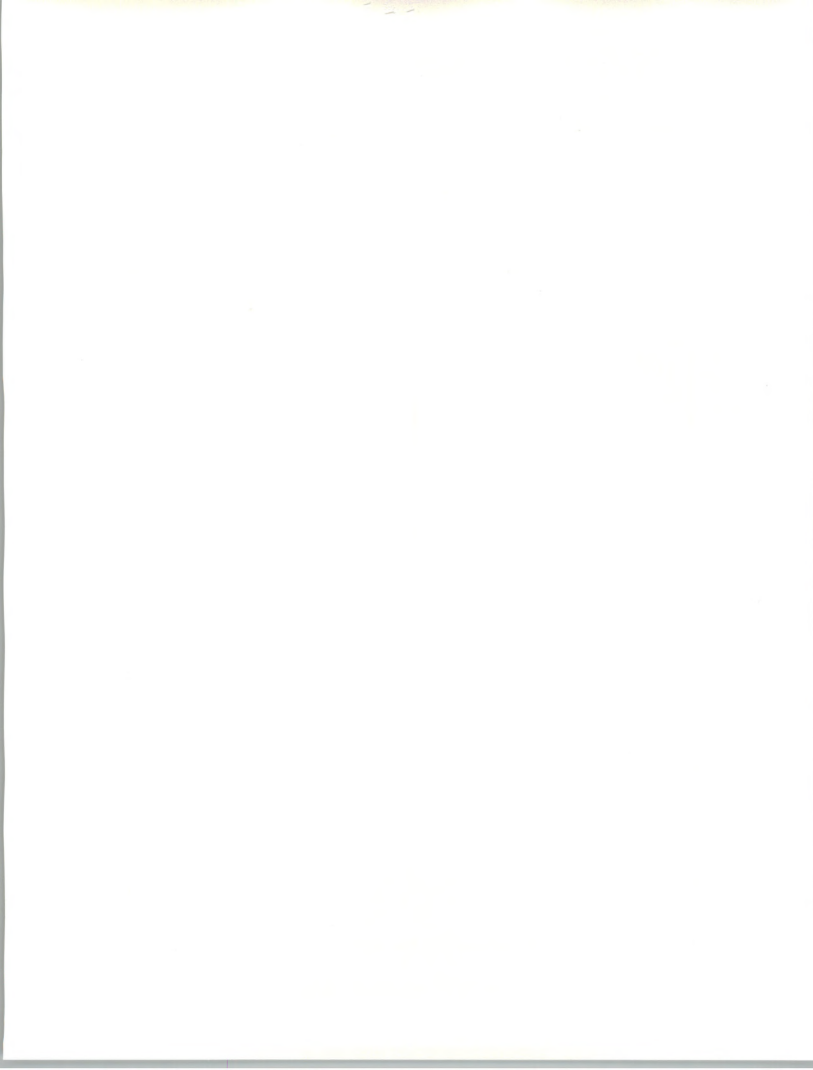


Systems Integration (Network Component)

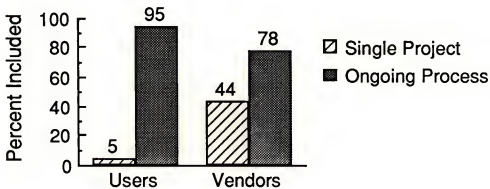


INPUT
JJSEM-2-7

Notes



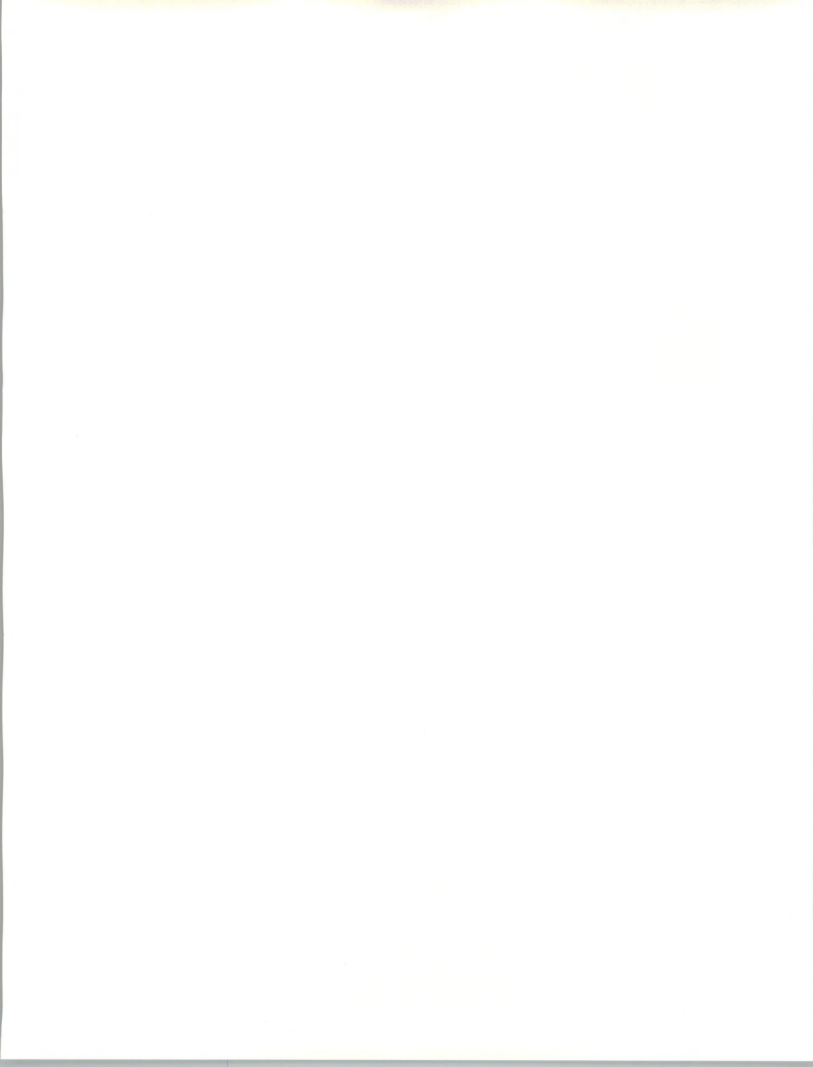
Is NI a Process or a Project?



Data totals more than 100% due to multiple responses

INPUT
JJSEM-2-8

Notes



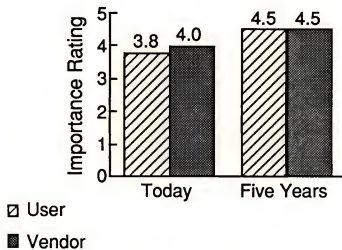
Business Development

INPUT
JSEM-2-9

Notes



Importance of Network Integration

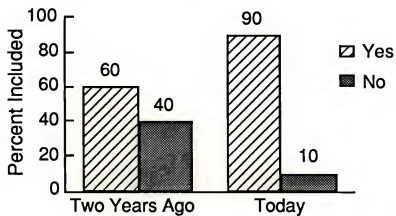


INPUT
JJSEM-2-10

Notes



Network Integration and Information Services Strategic Plan



INPUT
JJSEM-2-11

Notes

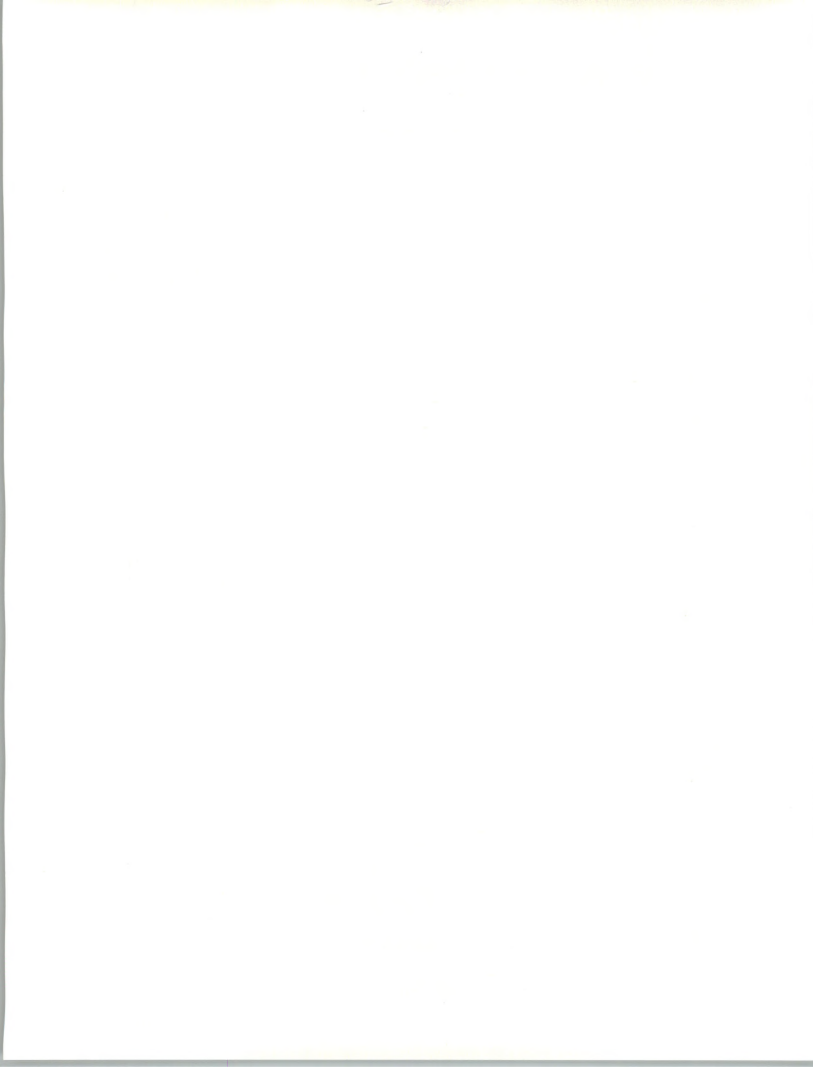


Network Integration Business Trends

- Increasing complexity
- Organization downsizing
- Global competitiveness
- Strategic positioning

INPUT
JJSEM-2-12

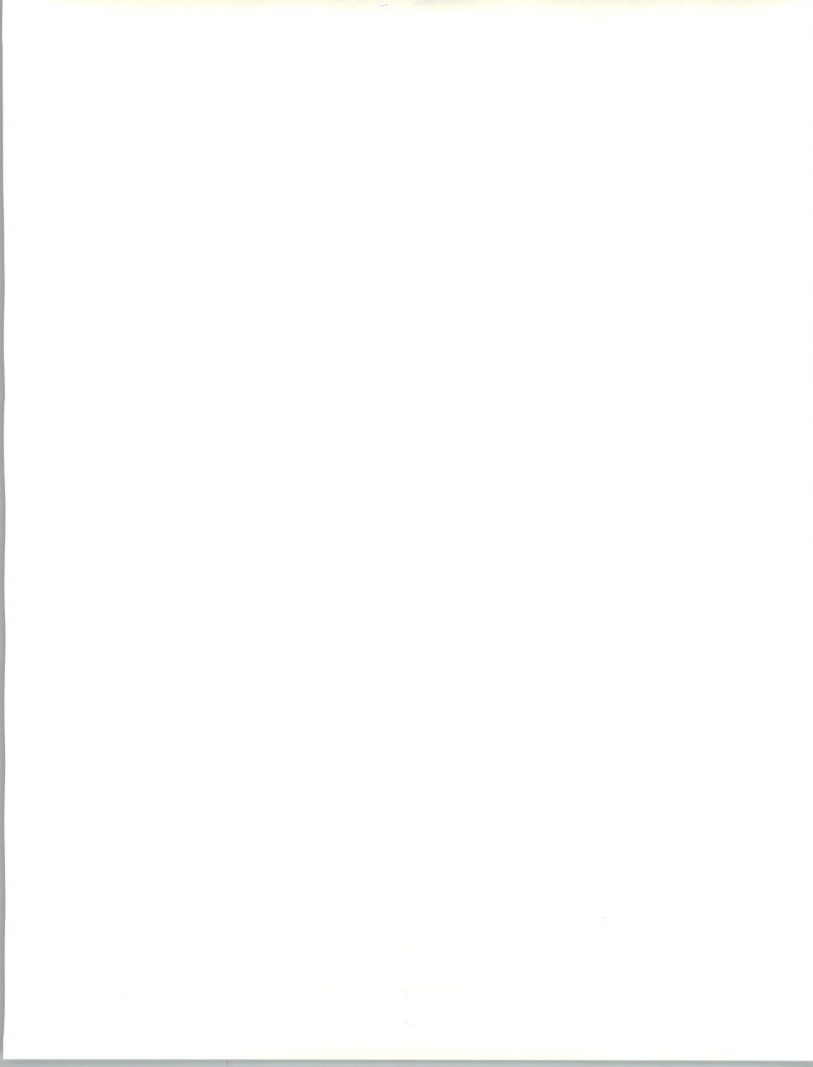
Notes



Technology Trends

INPUT
JJSEM-2-13

Notes

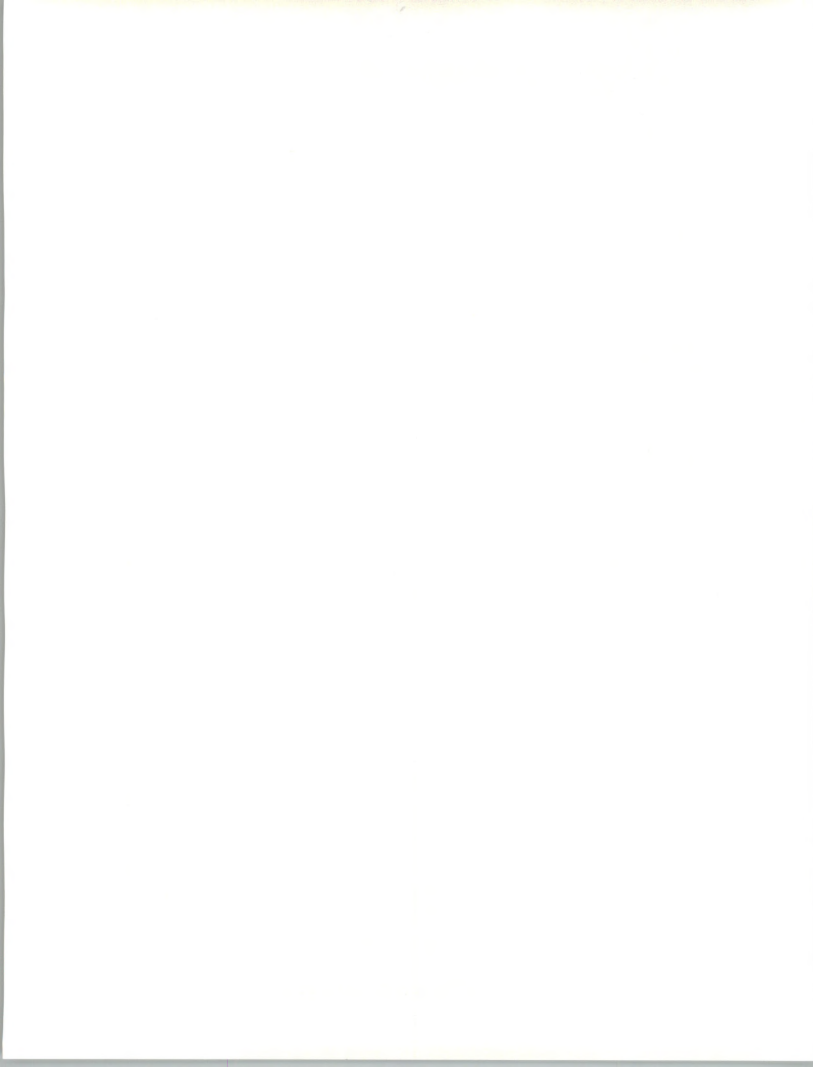


Network Integration Technology Trends

- Robust public networks
- Virtual network capability
- Enhanced value-added networks
- Increased PBX functionality
- Enhanced local-area networks

INPUT
JJSEM-2-14

Notes

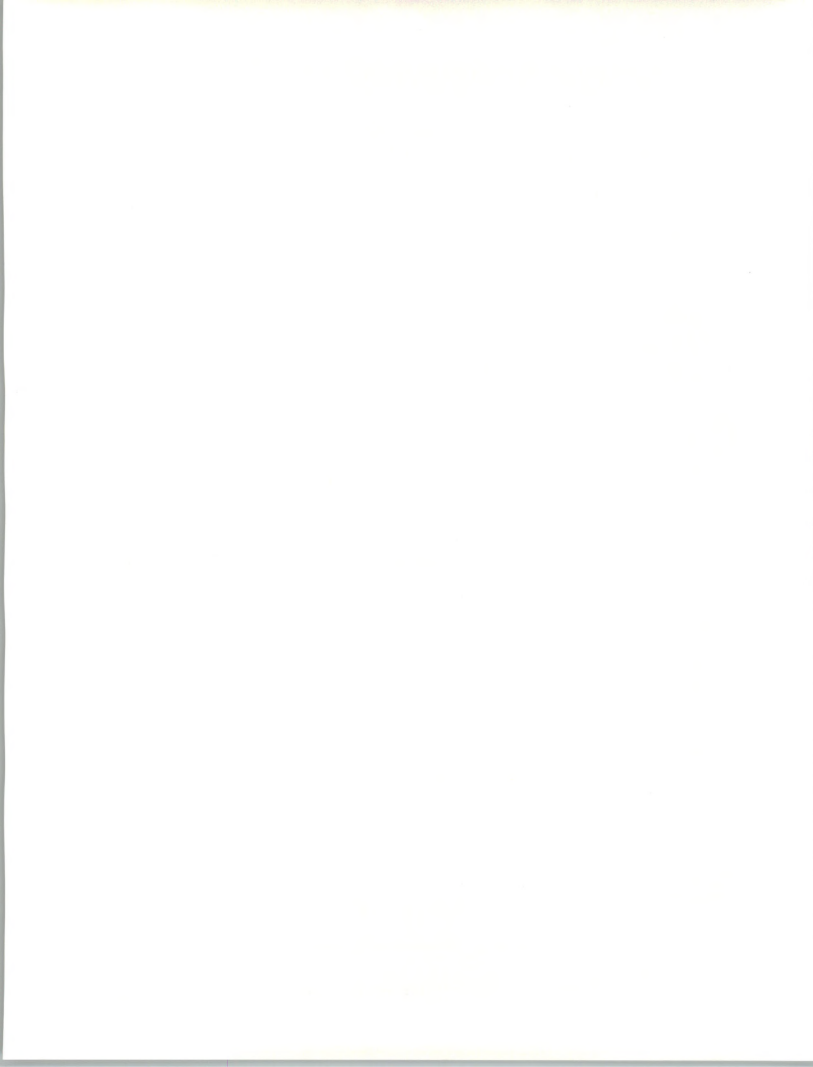


Network Integration Technology Trends

- Intelligent multiplexers
- RDBMSs
- Distributed processing
- PC/Workstation growth

INPUT
JJSEM-2-15

Notes



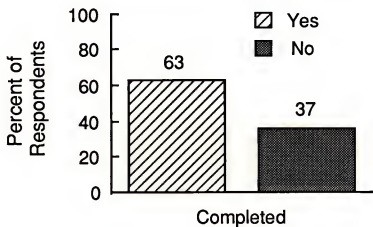
Market Forecast

INPUT
JJSEM-2-16

Notes



Network Integration Users Completed Projects

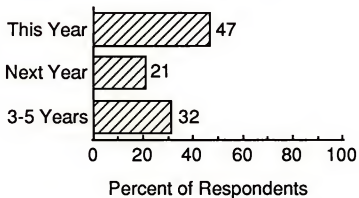


INPUT
JJSEM-2-17

Notes



Network Integration Users Planned Projects

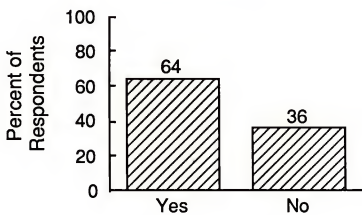


INPUT
JSEM-2-18

Notes



Users That Would Consider Contracting

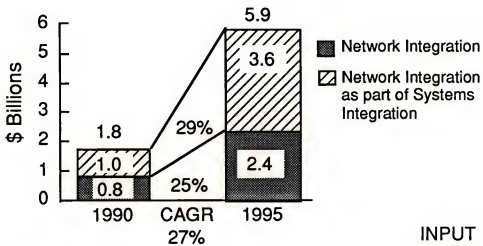


INPUT
JJSEM-2-19

Notes

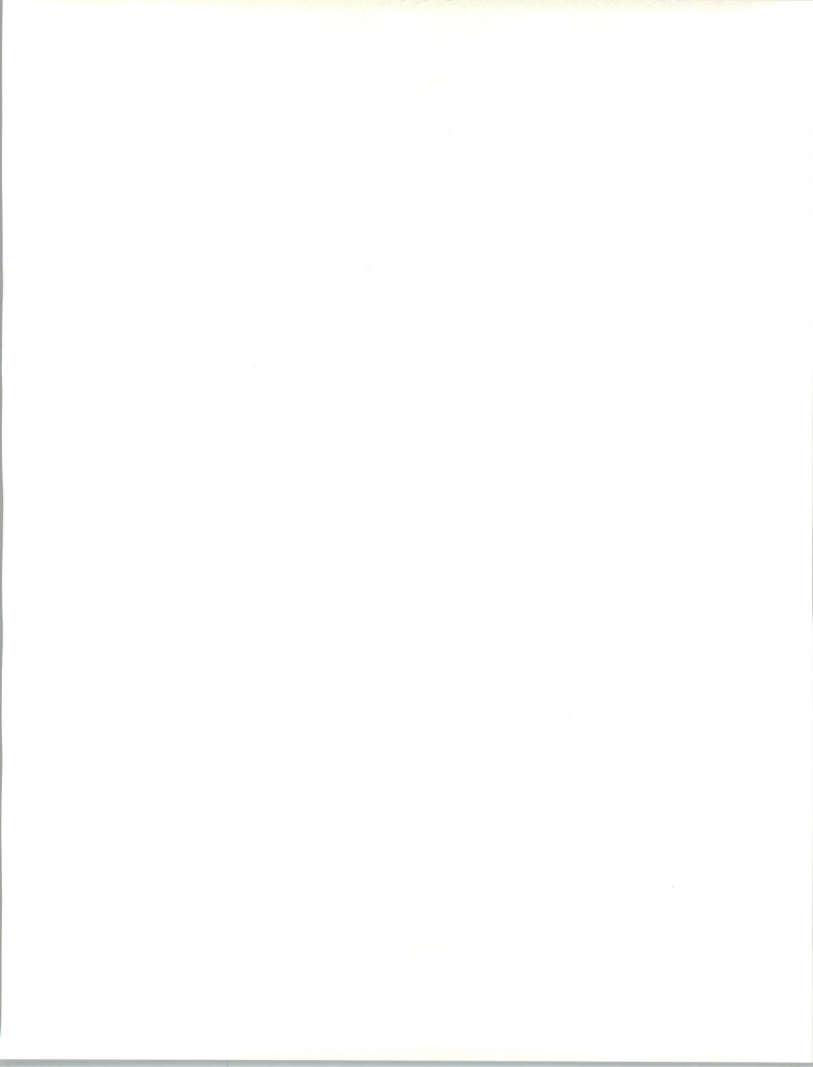


Commercial Network Integration Expenditures, 1990-1995



INPUT
JSEM-2-20

Notes



Vendors

INPUT
JJSEM-2-21

Notes

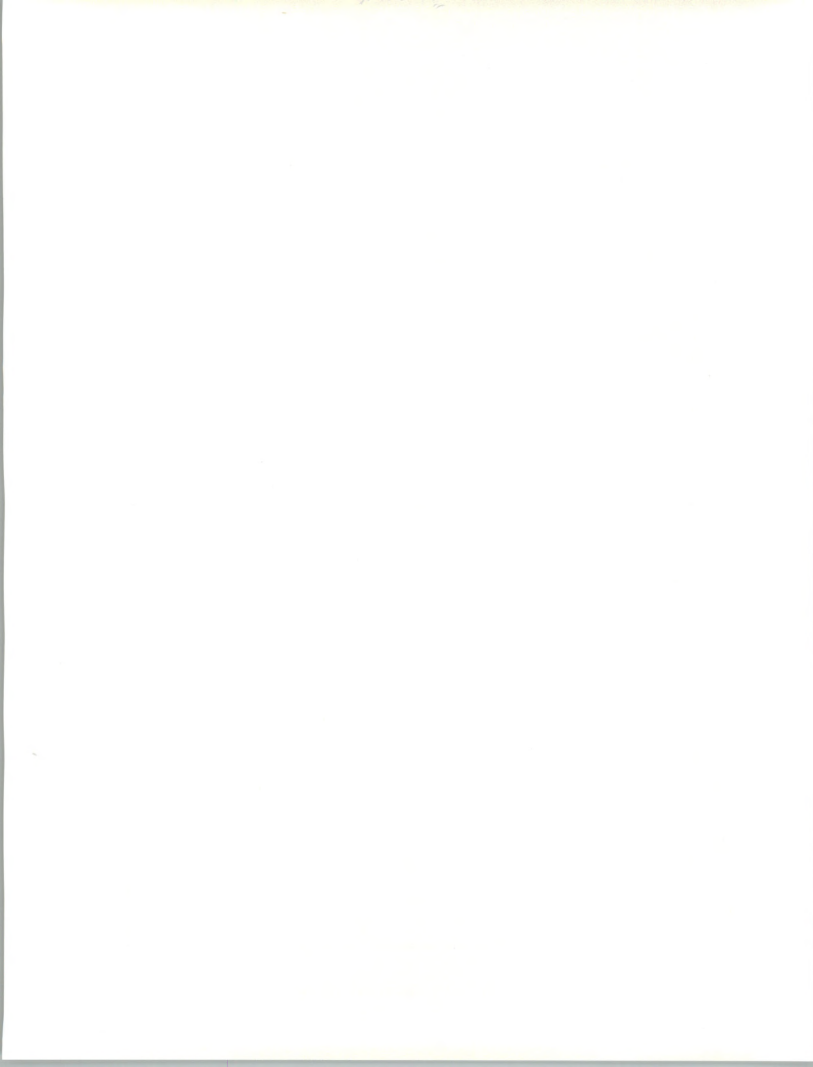


Primary Vendors' Capabilities

- Multivendor connectivity
- Ongoing support
- Network management
- Customer knowledge
- Prior experience
- Organizational stability

INPUT
JJSEM-2-22

Notes

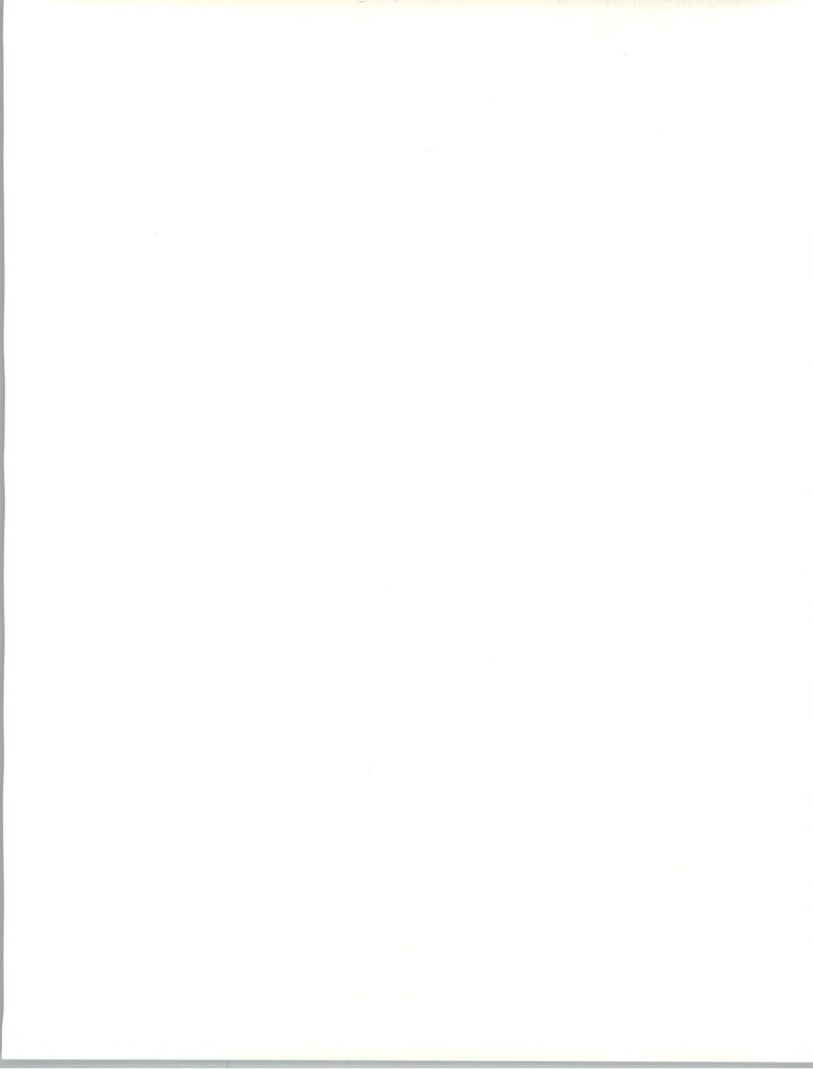


Network Integration Leading Vendors

- IBM
- AT&T
- DEC
- Novell
- 3Com

INPUT
JJSEM-2-23

Notes



Summary

INPUT
JJSEM-2-24

Notes

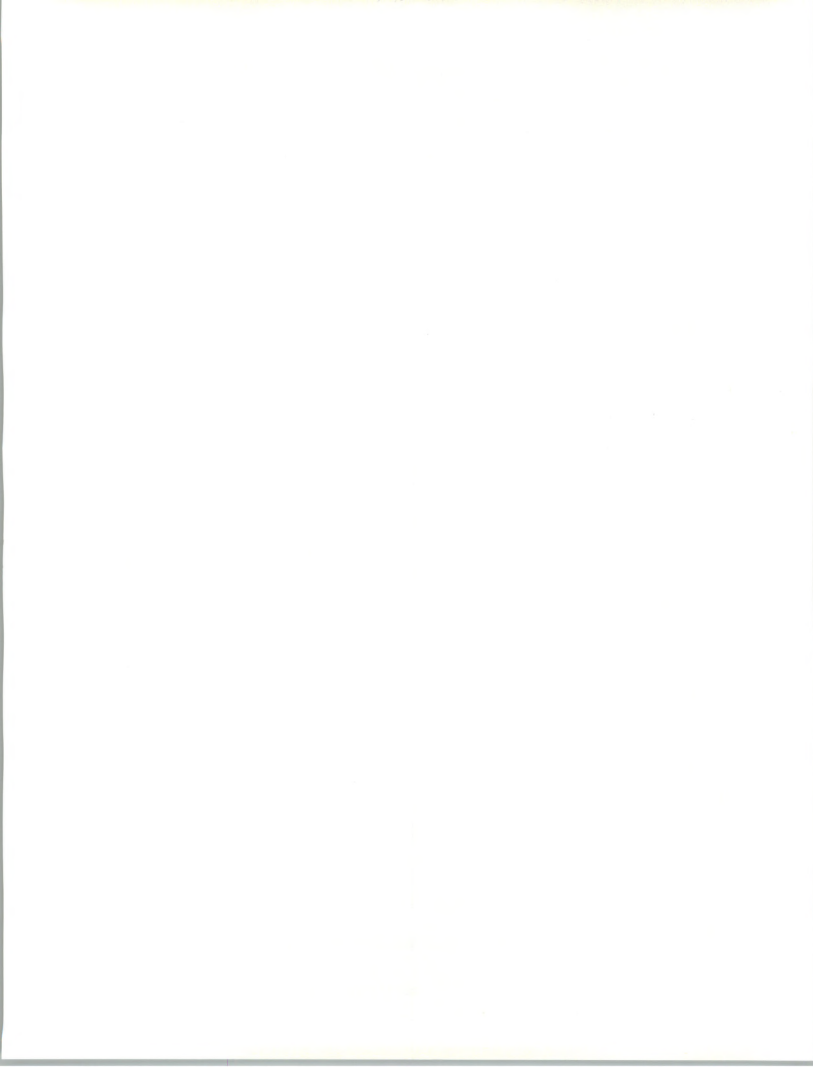


Driving Forces in Network Integration

- Business requirements
- LAN integration
- Network management tools
- ISDN services
- Reduced costs

INPUT
JSEM-2-25

Notes

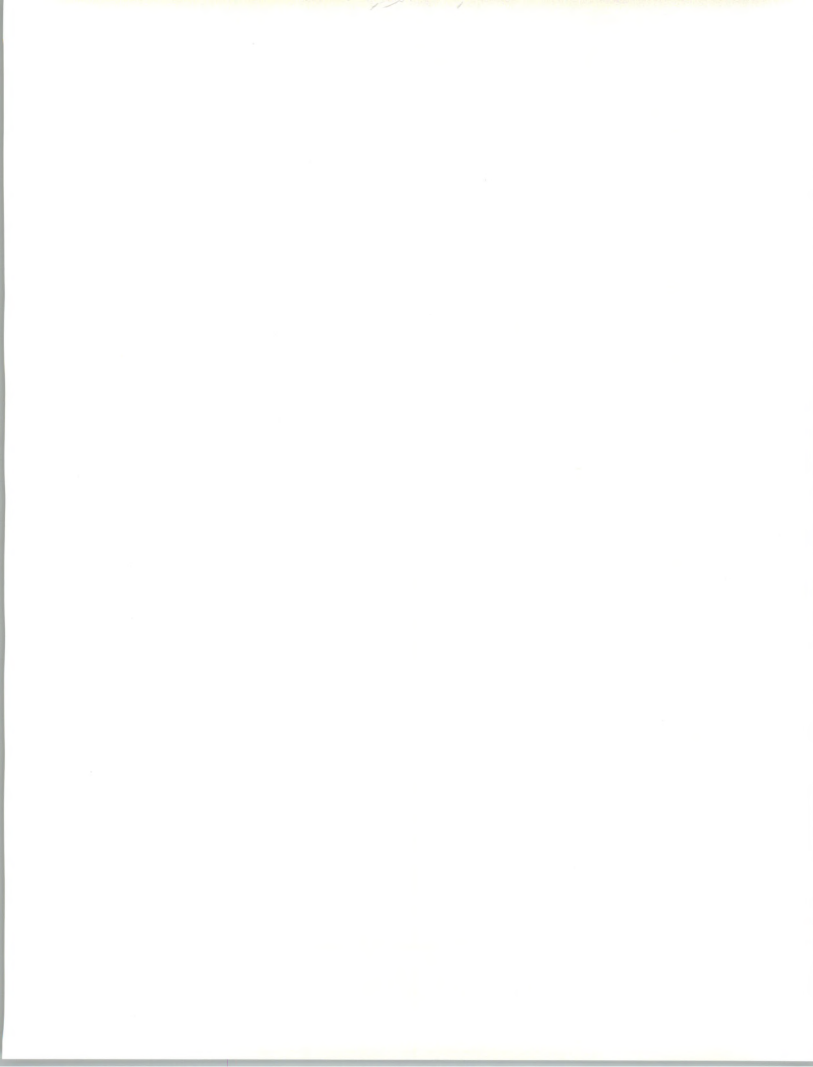


Network Integration Inhibiting Factors

- Need expertise in-house
- Vendors lack skills
- Vendors don't know business
- Better quality in-house
- Too important to contract

INPUT
JJSEM-2-26

Notes



Conclusions

- Integrated networks important
- NI/SI labels not important
- Network integration a process
- Total integration not possible
- Local-area/office networks need integrating

INPUT
JSEM-2-27

Notes

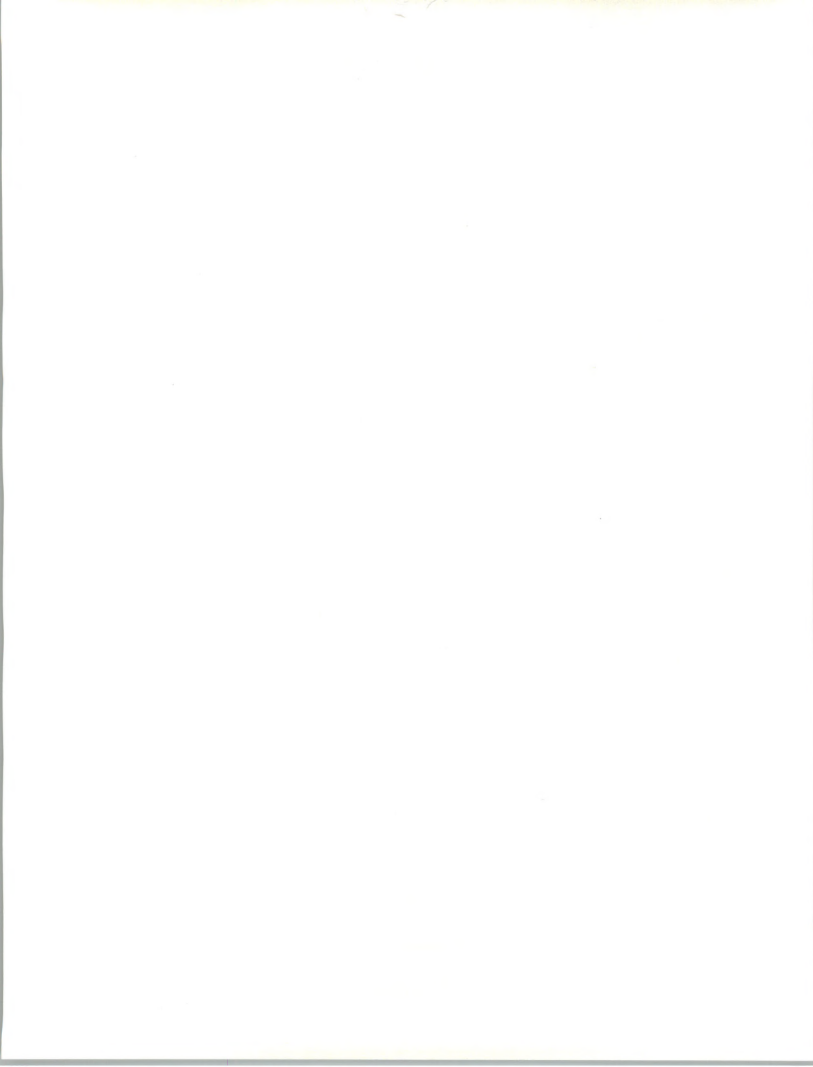


Conclusions

- Few vendors are network integrators
- Support necessary
- Multivendor expertise necessary
- Organizational knowledge necessary

INPUT
JSEM-2-28

Notes

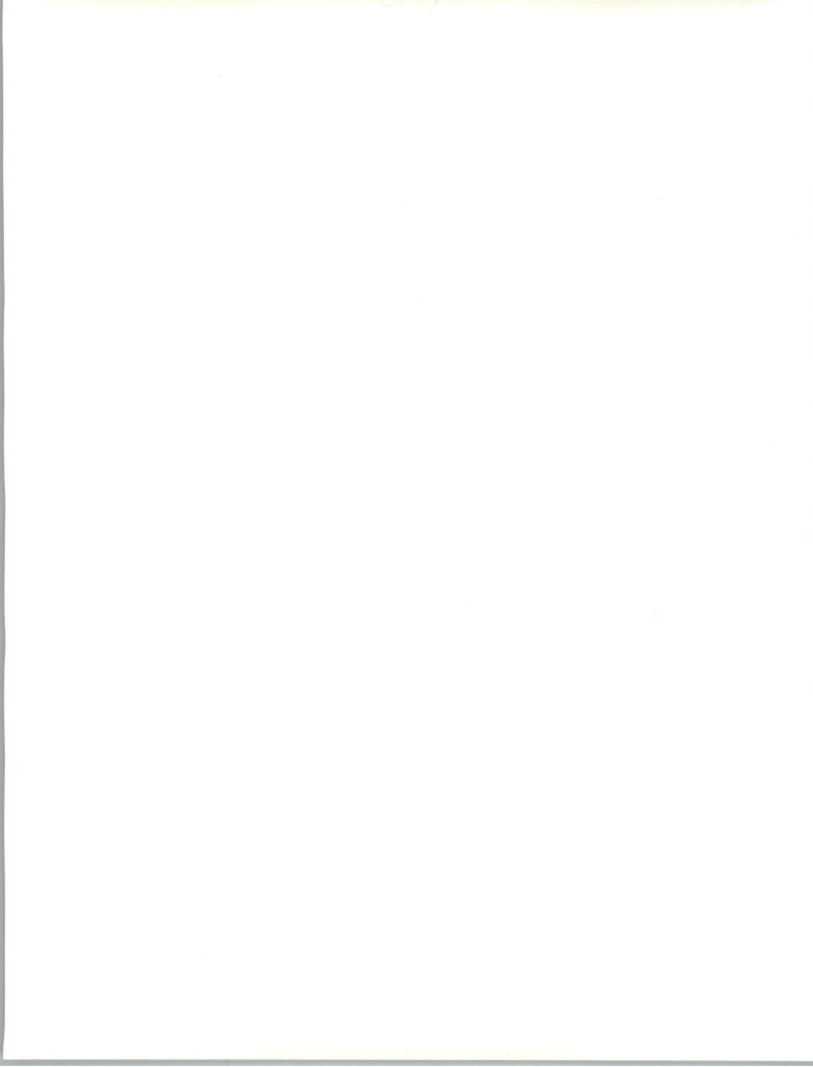


Recommendations

- Focus on platform integration
- Understand the end user
- Understand information flow
- Provide network support

INPUT
JJSEM-2-29

Notes



Japan Presentation
Section 2

~~JSEM-DEV-3-~~

JSEM-2

✓

Network Integration
A Growing Opportunity

INPUT
SIRC-A0-1

#1

✓

Contents

- Definitions
- Business drivers
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- Vendors ~~SET~~
- Summary

INPUT
SIRC-A0-2

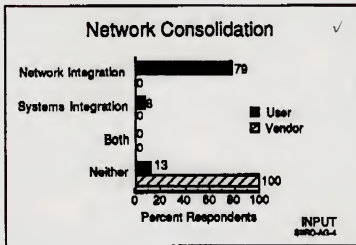
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✓

Definitions

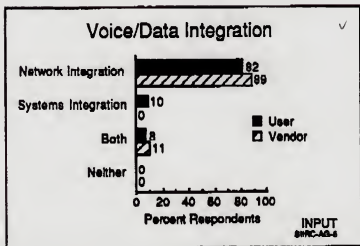
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SIRC-A0-3

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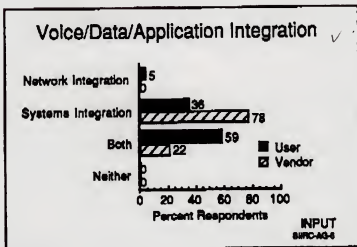


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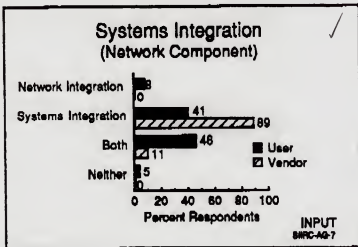


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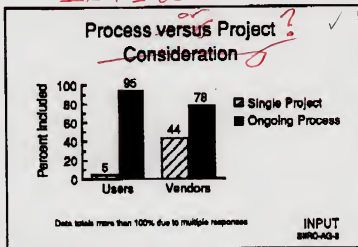


#6

IS NI a



#7



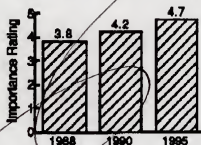
#8

Business Development

INPUT
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#9

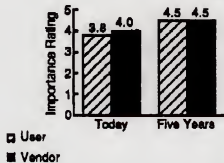
Network Importance to Business



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#10

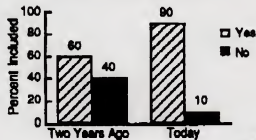
Importance of Network Integration



INPUT
BIRC-AG-11

#10

Network Integration and Information Services Strategic Plan



INPUT
BIRC-AG-12

11

Network Integration Business Trends

- Increasing complexity
- Organization downsizing
- Global competitiveness
- Strategic positioning

INPUT
89PC-AQ-12

#12

Technology Trends

INPUT
89PC-AQ-14

#13

Network Integration Technology Trends

- Robust public networks
- Virtual network capability
- Enhanced value-added networks
- Increased PBX functionality
- Enhanced local-area networks

INPUT
89PC-AQ-15

#14

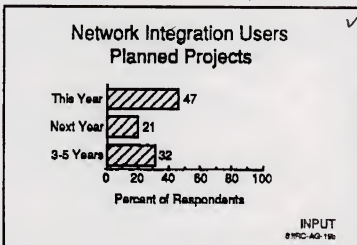
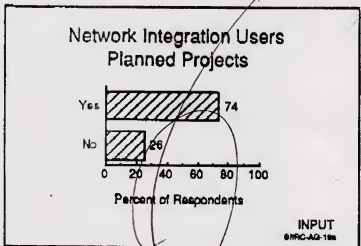
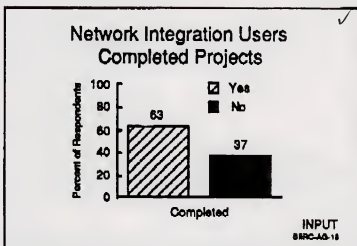
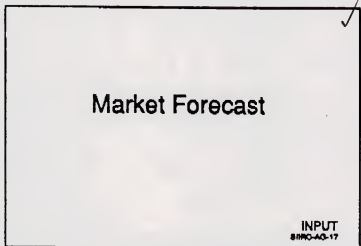
Network Integration Technology Trends

- Intelligent multiplexers
- RDBMSs
- Distributed processing
- PC/Workstation growth

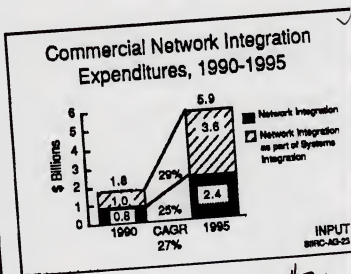
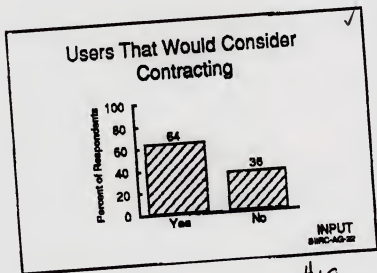
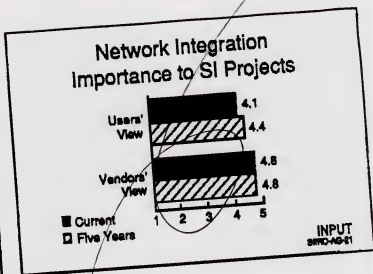
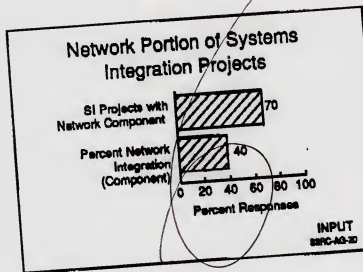
INPUT
89PC-AQ-18

#15











Network Integration Services Leading Industry Sectors

Sector	Rank
Banking/Finance	1
Manufacturing	2
State/Local Govt.	3
Retail Distribution	4

INPUT
#21C-A6-24

Vendors

INPUT
#21C-A6-25

#21

Primary Vendors' Capabilities

- Multivendor connectivity
- Ongoing support
- Network management
- Customer knowledge
- Prior experience
- Organizational stability

INPUT
#22C-A6-26

#22

Network Integration Leading Vendors

- IBM
- AT&T
- DEC
- Novell
- 3Com

INPUT
#23C-A6-27

#23



Summary

INPUT
BTRC-AG-24

#24

Driving Forces in Network Integration

- Business requirements
- LAN Integration
- Network management tools
- ISDN services
- Reduced costs

INPUT
BTRC-AG-25

#25

Network Integration Inhibiting Factors

- Need expertise in-house
- Vendors lack skills
- Vendors don't know business
- Better quality in-house
- Too important to contract

INPUT
BTRC-AG-30

#26

Conclusions

- Integrated networks important
- NI/SI labels not important
- Network Integration a process
- Total integration not possible
- Local-area/office networks need integrating

INPUT
BTRC-AG-31

#27



Conclusions

- Few vendors are network integrators
- Support necessary
- Multivendor expertise necessary
- Organizational knowledge necessary

INPUT
BIFC-AG-38

#28

Recommendations

- Focus on platform integration
- Understand the end user
- Understand information flow
- Provide network support

INPUT
BIFC-AG-38

#29

