

INPUT
Conférence du 31 mai 1991

**Les Marchés des Logiciels
& Services en Europe
1990-1995**

Hotel Royal Monceau

Paris

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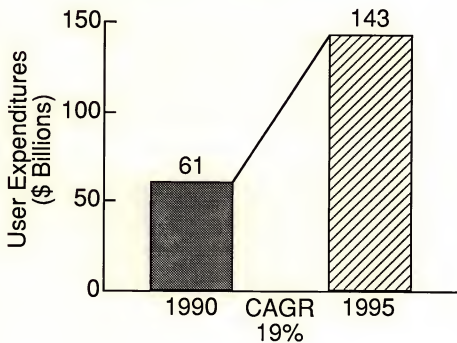
Panorama et Tendances des Marchés

**Peter Lines
Vice President
European Research**



Western Europe, 1990-1995

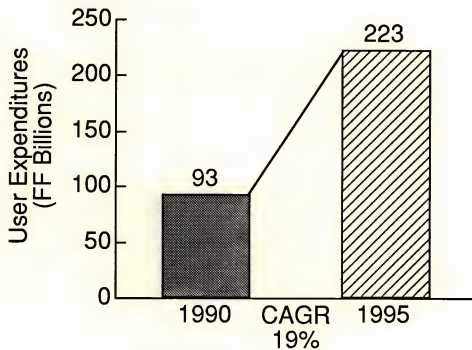
Software and Services





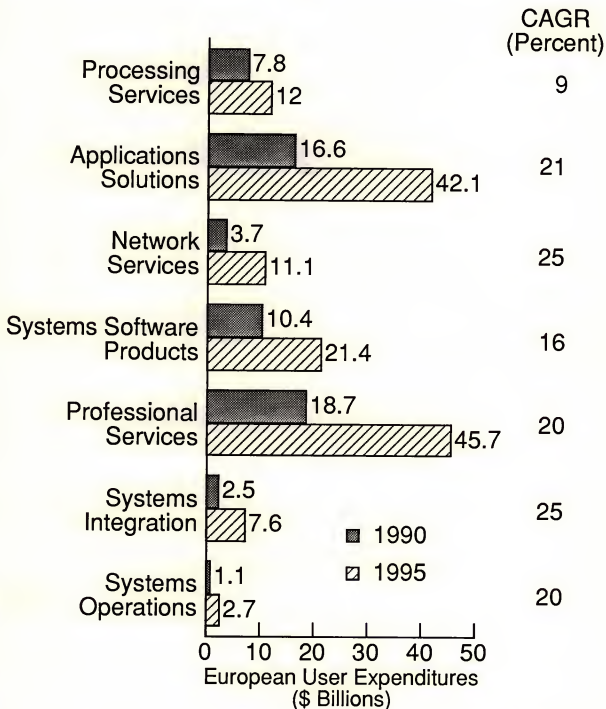
France, 1990-1995

Software and Services





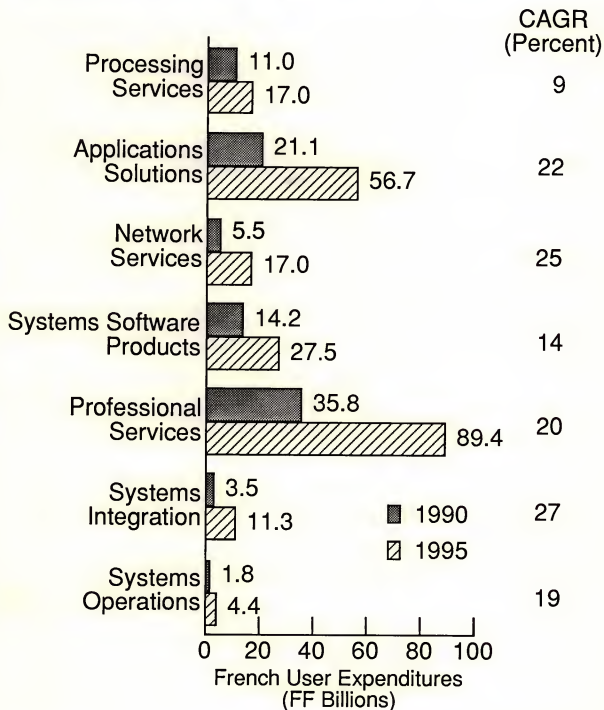
Computer Software and Services Markets by Delivery Mode, 1990-1995





France

Computer Software and Services Markets by Delivery Mode, 1990-1995





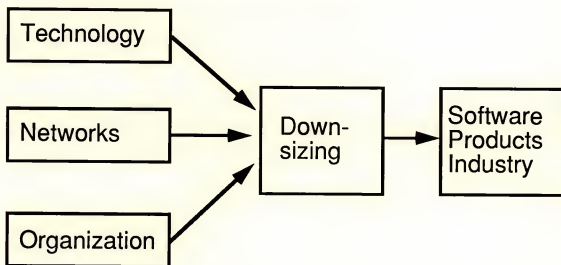
Western Europe

Leading Independent Vendors 1990 Software and Services

Rank	Vendor	Revenues (Est. \$M)	Market Share (%)
1	CGS	1060	2
2	Reuters	1050	2
3	Andersen	700	1

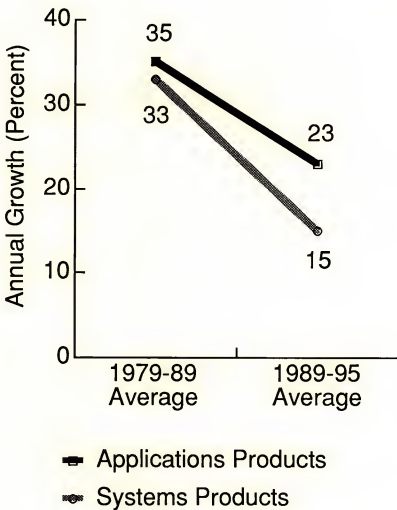


Downsizing Driving Forces





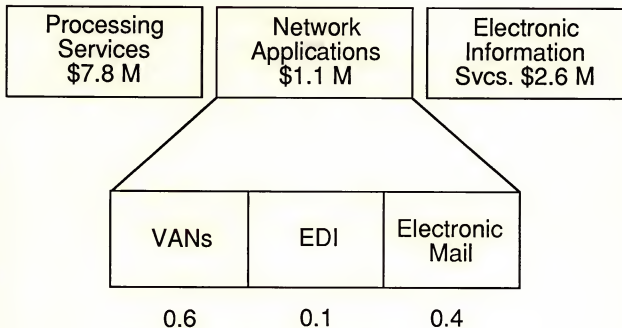
Systems Software Product Growth Declines In Western Europe





Western Europe

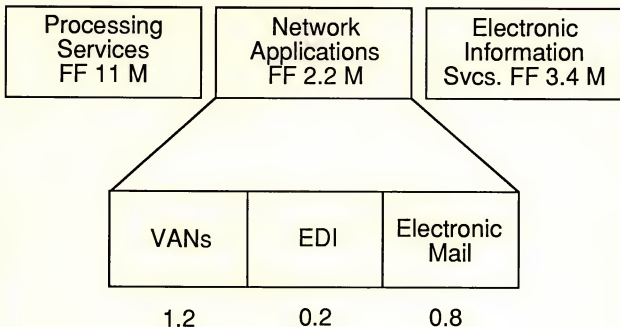
Market Sector Comparison, 1990





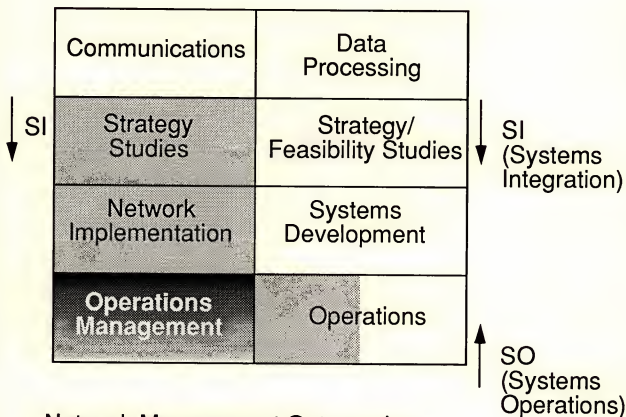
France

Market Sector Comparison, 1990





Network Management in Context



Network Management Outsourcing

-  Strong potential
-  Weaker potential



**Outsourcing is the
contracting of information
systems (IS) functions to
external vendors.**



Evolution of Outsourcing

Type of Product or Service	1970s	1990s
Applications Software	Applications Packages → Applications Management	
Professional Services	Consulting Contract Prog → Systems Integration	
Processing Services	Specific Proc Serv → Systems Operations	



Systems Integration, Western Europe

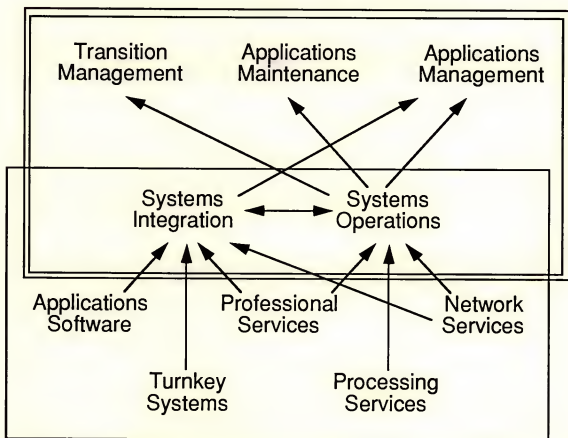
Management and IT Consultancy Congruence

- Andersen Consulting
- Meritus
- CGS/United Research
- CGS/Index Group



Outsourcing Developing Market Opportunities

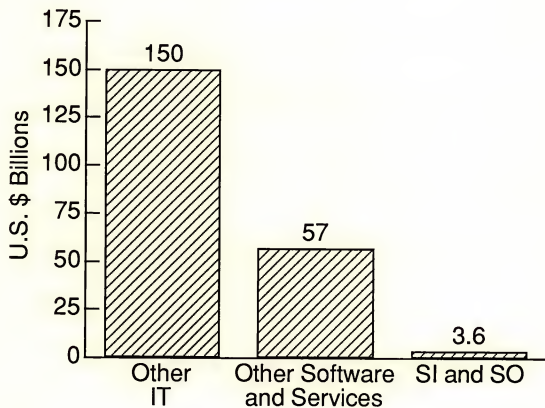
Systems Management Functions



Delivery Modes



Total IT Expenditure Western Europe, 1990



Total = \$216 Billion

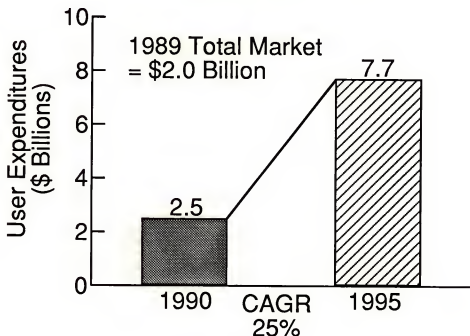


Challenges Offert par l'Intégration de Systèmes

**John Willmott
Consultant**

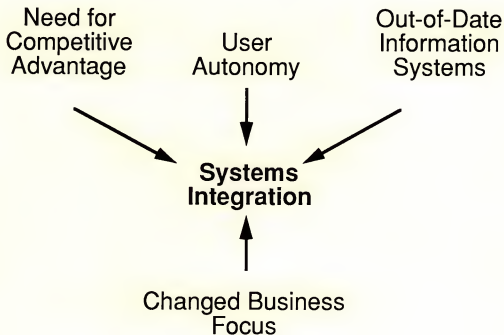


Western European Systems Integration Market 1990-1995





Systems Integration, Western Europe Driving Forces



Systems Integration, Western Europe Key Driving Forces: Vendor Perception

Factor	Level of Importance
Lack of in-house technical capability	Very High
Lack of in-house IS resources	High
Migration to open systems	Medium-High
Need to link heterogeneous equipment	Medium-High

Systems Integration, Western Europe Key Players in Buying Process

Vendor type Player	Equip. Vendors	Prof. Serv. Vendors	Mgmt. Consult.
Client board-level personnel	High	Medium	Very High
Head of information systems	High	Very High	Medium
Client middle management	Low	High	Medium

Systems Integration, Western Europe Vendor Targeting

- Major organizations
- Industries undergoing radical change
- Companies with highly distributed operations



Systems Integration, Western Europe Strengths and Weaknesses of Management Consultancies

Strengths	Weaknesses
High-calibre personnel	Expensive
Credibility with user top management	Sometimes overrun cost and timescales
Business consultancy skills	Looking for repeat business



Systems Integration, Western Europe Strengths and Weaknesses of Major Equipment Vendors

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Account management	Lack of independence
	Lack of development expertise/resources

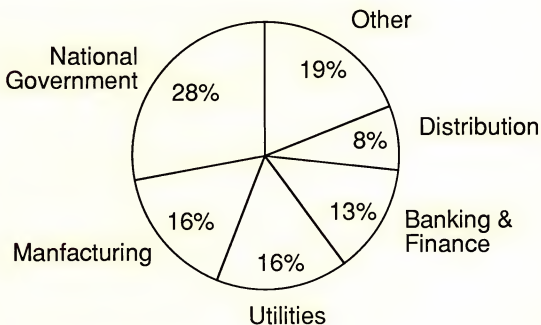


Systems Integration, Western Europe Strengths and Weaknesses of Professional Services Vendors

Strengths	Weaknesses
Relationship with IS management	Business consultancy skills
Project management skills	Perceived technical orientation
Implementation/technical skills	Lack of access to user top management



Industry Market Opportunities Systems Integration, Western Europe



1990 Total Market = \$2.5 Billion



Importance in Buying Process Computer-Integrated Manufacturing, Western Europe

User Personnel	Degree of Importance
Top management	High
Manufacturing management	Medium-High
IS management	Medium-High



Importance in Lead Generation Computer-Integrated Manufacturing, Western Europe

Means of Lead Generation \ Vendor type	Equip. Vendors	Prof. Serv. Vendors
Account Managers	High	Medium
New Business Sales Force	Medium	High
Collaboration Partners	Medium	High
External Consultants	Low	Medium



Vendor Issues: Alliances

- IBM and Coopers & Lybrand
- IBM Approved Industrial Systems Integrators
- Cincom "CIM Alliance" Programme
- ASK and EDS



Vendor Challenges Systems Integration, Western Europe

- Access to key decision makers
- Integration architecture
- Building key partnerships
- Open systems and product branding
- Profitability

Nouvelles Opportunités autour de la Maintenance des Logiciels Internes

**Roger Fulton
Consultant**

INPUT

ORIGINALS
MOVED TO
MEMAP 6/91

Operational Software Support (Software Maintenance)

- Support and maintenance of in-house developed software
 - Two-thirds of all software activity
 - Today the smallest outsourced sector
- Largest services opportunity of the 1990s
- Centred on management issues

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1975

1975

1975

1975

1975

Categories of Software by Source

- Class A In-house developed
- Class B Custom/contracted
- Class C Application products
- Class D System products

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THE HISTORY OF THE

REIGN OF

CHARLES THE FIRST

BY

JOHN BURNET

OF

THE UNIVERSITY OF OXFORD

IN TWO VOLUMES

LONDON

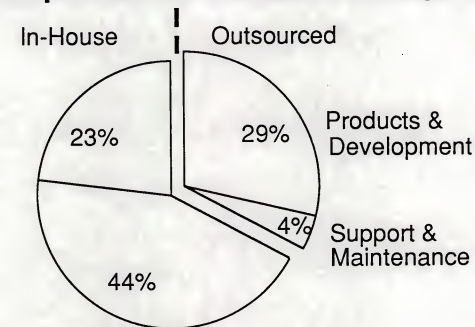
Software Maintenance Definitions

- Product vendor
 - Fixing faults in software product
- Services vendor
 - Keeping each client happy
- IS management
 - Everything done after software goes live

INPUT



European User Software Budgets



1990 Total: \$90 Billion

INPUT

THE HISTORY OF THE

REIGN OF HENRY THE SEVENTH

BY JOHN HALLAM

IN THREE VOLUMES

LONDON: PRINTED BY J. JOHNSON, ST. PAULS CHURCH-YARD, 1798.

Vol. I.

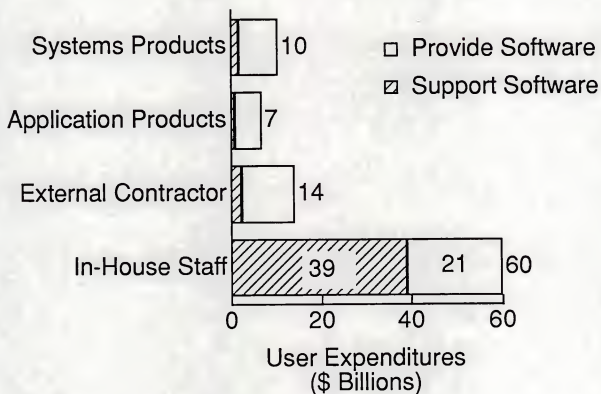
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European User Software Budgets



INPUT



User Case Study Government Sector

Problem—Operational software support

- Improve user service/lower costs

Solution—Outsourcing

Benefits

- >50% cost savings on staff ~\$70 p.a.
- 8 full-time staff replaced by 4 part-time
- System life extended 5 years

INPUT



User Case Study Telecommunications Sector

Problem—Operational software support

- Free up staff and improve user service

Solution—Outsourcing

- Mix of in-house and third-party staffing

Benefits

- 19 staff released for new projects
- Call-outs reduced ten-fold
- Working practices adopted by client

INPUT



Operational Software Support Outsourcing Benefits

- Contracted quality of service for users
 - Better performance and reliability
 - Running costs known, and decreasing
- In-house staff released for new projects
- IS operational efficiency improved
 - Proven management techniques

INPUT

THEORY OF THE EARTH
AND ITS HISTORY

The present volume is a
comprehensive treatise on
the subject of the earth and
its history. It covers the
entire range of geological
science, from the origin of
the earth to the present day.

Operational Software Support Service Vendor Opportunities

- Support and maintenance contract
 - User service levels
 - Hand-over staffing and timing
 - Emergency services
 - Software maintenance/enhancement
 - Procedures/methods enhancement
 - Management control and reporting

INPUT



Operational Software Support Product Vendor Opportunities

- Management tools:
 - User service levels
 - IS resources
 - Software
- Software engineering tools:
 - CASE tools, whole life cycle
 - Reverse, re-engineering, conversion

INPUT



Conclusions

- Operational software support services
 - Untapped market opportunity
 - Total user spend ~\$44B
 - Less than 1% is outsourced
- Primary need is IS management skills rather than software engineering tools
- Natural fit in the systems operations market
- Strong vendor marketing is needed

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DESCRIPTION:

Peter Lines' Paris presentation.

EMF1X 219.

- Just this slide (attached)
is required, updated to
show 1990 revenues.

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DATE: 23 MAY

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Project Charge Code: _____

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THE UNIVERSITY OF CHICAGO
CHICAGO, ILLINOIS
JANUARY 1900
TO THE PRESIDENT OF THE UNIVERSITY OF CHICAGO
FROM THE FACULTY OF THE UNIVERSITY OF CHICAGO
RESOLUTION

Resolved, That the Faculty of the University of Chicago
do hereby express their appreciation of the services
of the President of the University of Chicago
for the past year, and do hereby express their
confidence in the President of the University of Chicago
for the future.

ATTEST
JANUARY 1900
THE FACULTY OF THE UNIVERSITY OF CHICAGO

5

Western Europe

Leading Independent Vendors 1989 Software and Services

1990

Rank	Vendor	Revenues (Est. \$M)	Market Share (%)
1	CGS	1060980	2
2	Reuters	900	2
3	Andersen	700520	1

54MF-18

1050 INPUT

Notes

4/15/91

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INPUT

PETER LINES'

PARIS PRESENTATION.

Overheads please:

Title Slide - ya already have (in French).

- 1 E-MF-1
- 2 E-MF-1 with changes - see attached
- 3 MEMAP-PL-4
- 4 MEMAP-PL-4 with changes - see attached
- 5 E-MF-18+19 as one overhead.
- 6 MS-21
- 7 MEMAP-PL-17
- 8 E-NS-3 - remove box saying 'OTHER' N/A.
- 9 E-NS-3 - with changes see attached
- 10 SESMP-ML-17
- 11 DU-6
- 12 DU-18
- 13 see attached - sorry can't read the number!
- 14 MEMAP-PL-22
- 15 MEMAP-PL-23

MEMAP

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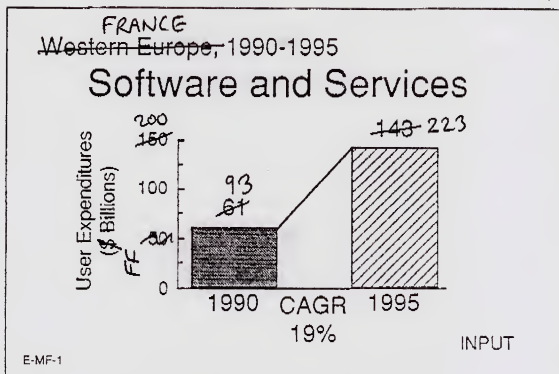
Panorama et Tendances
des Marchés

Peter Lines

Vice President European Research.



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Notes

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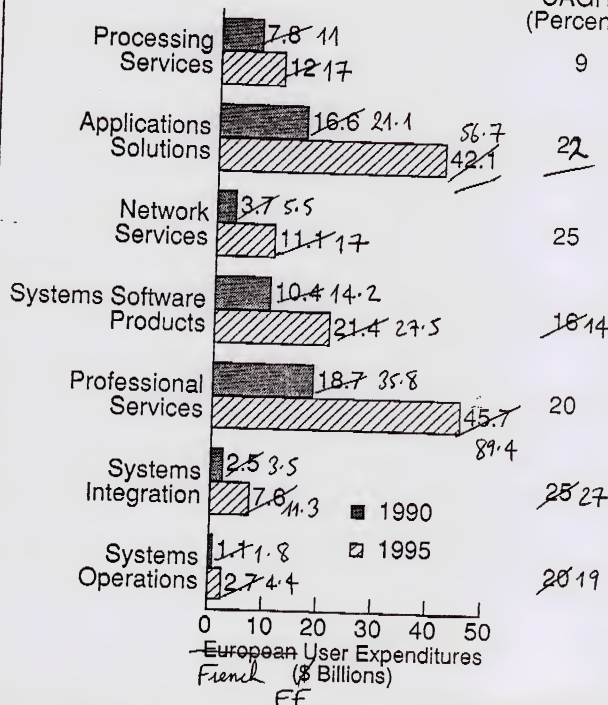
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Computer Software and Services Markets by Delivery Mode, 1990-1995

CAGR
(Percent)



Computer Software and Services by Delivery Mode, 1990-1995



U.S. Information Services Industry

INPUT

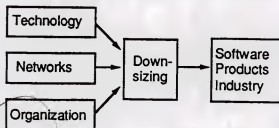
MS-19

Opportunities in a Changing Market

INPUT

MS-20

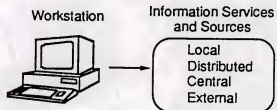
Downsizing Driving Forces



MS-21

INPUT

Window to the Information Network



MS-22

INPUT

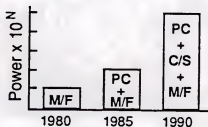
Application Distribution

Type	Location		
Personal	1980	1985	1990-1995
	Main-frame	PC	PC
Departmental	Main-frame	Mainframe	Client/Server
	Main-frame	Mainframe	Mainframe

MS-23

INPUT

Computing Power

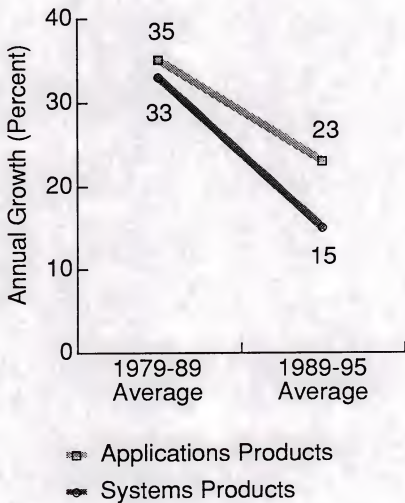


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Systems Software Product Growth Declines In Western Europe

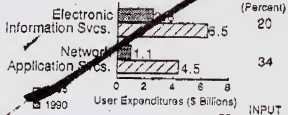




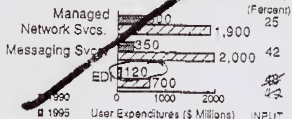
slight rounding
errors but
basically o.k.

Western Europe Network Services Market

1990-1995

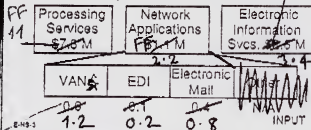


Western Europe Network Application Services Market, 1990-1995



check
table

Western Europe - FRANCE Market Sector Comparisons, 1990



Network Application Services Western Europe Leading Vendors, 1989

Rank	Company	Est. Revenues (\$ M)
1	Teis	100
2	Infonet	80
3	BT/Tymnet	80
4	GSI	70
5	France Telecom	60

INPUT

Electronic Information Services Western Europe

Leading Vendors, 1989

Rank	Company	Est. Revenues (\$ M)
1	Reuters	700
2	Exel	250
3	Teletext	200
4	DatS	140
5	Telekurs	100

INPUT

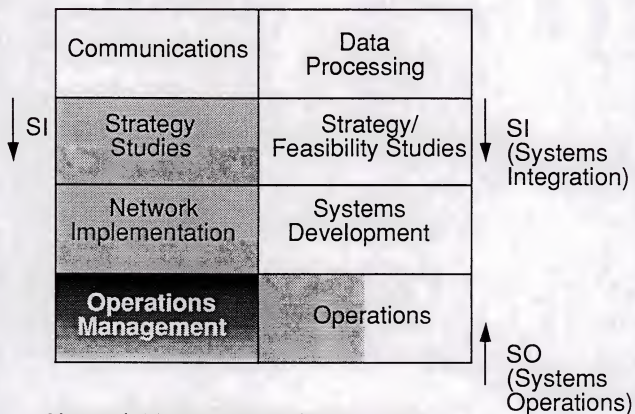
Western Europe Electronic Information Services, 1990

- One million users
 - 1,000 data bases
 - 100 on-line vendors
- INPUT

is it possible to left justify
the numbers?



Network Management in Context



Network Management Outsourcing

-  Strong potential
-  Weaker potential

INPUT



What is it?

Why is it becoming
a major factor?

OU-1

INPUT

Beyond Products: Service-Based Strategy

HBR March/April 1990

OU-2

INPUT

Key Findings

- Value added from services
- Technology enhances services
- Services enable competitive differentiation

Source: HBR Article

OU-3

INPUT

Recommendations

- Focus on core services
- Outsource other activities

Source: HBR Article

OU-4

INPUT

Outsourcing

- Outsource non-competitive activities
- Outsourcing builds flexibility
- Outsourcing allows focus

Source: HBR Article

OU-5

INPUT

Outsourcing is the
contracting of information
systems (IS) functions to
external vendors.

OU-6

INPUT



Outsourcing Vendors

- Approaches differ greatly
- Variety of capabilities needed
- Partnerships/alliances result

OU-13

INPUT

Corporate Organization

- IT and IS will change the organization
- How will it operate?

OU-14

INPUT

Corporate Organization

- People
 - How many?
 - When?
 - What skills?

OU-15

INPUT

Transition Management

- Dramatic growth potential
- IS and non-IS components

OU-16

INPUT

Potential for revolution is there.

Forecasts are based on evolution.

OU-17

INPUT

Evolution of Outsourcing

Type of Product or Service	1970s	1990s
Applications Software	Applications Packages	Applications Management
Professional Services	Consulting Contract Prog	Systems Integration
Processing Services	Specific Proc Serv	Systems Operations

OU-18

INPUT



Typical Groupe Bull SI Projects

Client	Project
Ansaldo (I)	Plant automation
DSS (U.K.)	OSI network
Post Office (F)	Workstation network for financial services

INPUT

Systems Integration, Western Europe Vendor Targeting

- Major organizations
- Industries undergoing radical change
- Companies with highly distributed operations

INPUT

Systems Integration, Western Europe

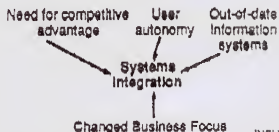
Management and IT Consultancy Congruence

- Andersen Consulting
- Meritux
- CGS/United Research
- CSC/Index Group

INPUT

Systems Integration, Western Europe

Driving Forces



INPUT

2

1. The first step in the process of the cell cycle is the G₁ phase. During this phase, the cell grows and prepares for division. The cell cycle is a continuous process that repeats itself.



2. The second step in the process of the cell cycle is the S phase. During this phase, the DNA is replicated, resulting in two identical copies of each chromosome.

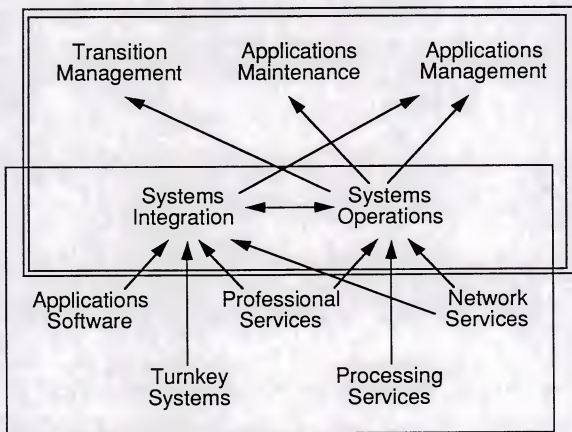
3. The third step in the process of the cell cycle is the G₂ phase. During this phase, the cell grows and prepares for division. The cell cycle is a continuous process that repeats itself.

4. The fourth step in the process of the cell cycle is the M phase. During this phase, the cell divides into two daughter cells.

5. The cell cycle is a continuous process that repeats itself. The cell cycle is a continuous process that repeats itself.

Outsourcing Developing Market Opportunities

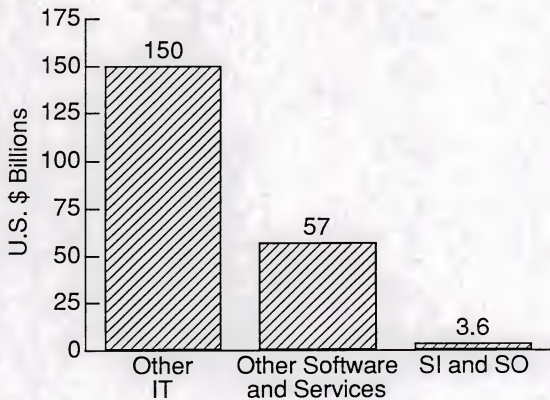
Systems Management Functions



Delivery Modes



Total IT Expenditure Western Europe, 1990



Total = \$216 Billion



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on slide 2.Thanks,John

FROM: JOHN WILLMOTTDATE: 22.5.91

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Challenges Offert par l'Intégration de Systèmes

John Willmott
Consultant

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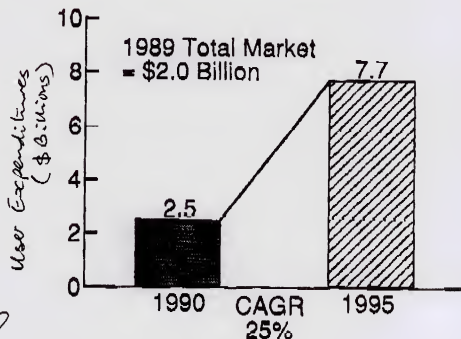
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Integration & Systems

John Willmott
(Consultant)

1993

Western European Systems Integration Market 1990-1995



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Western Mountain Systems Information Market 1995-1996



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Challenges Ozzent par
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Consultant.

Single like
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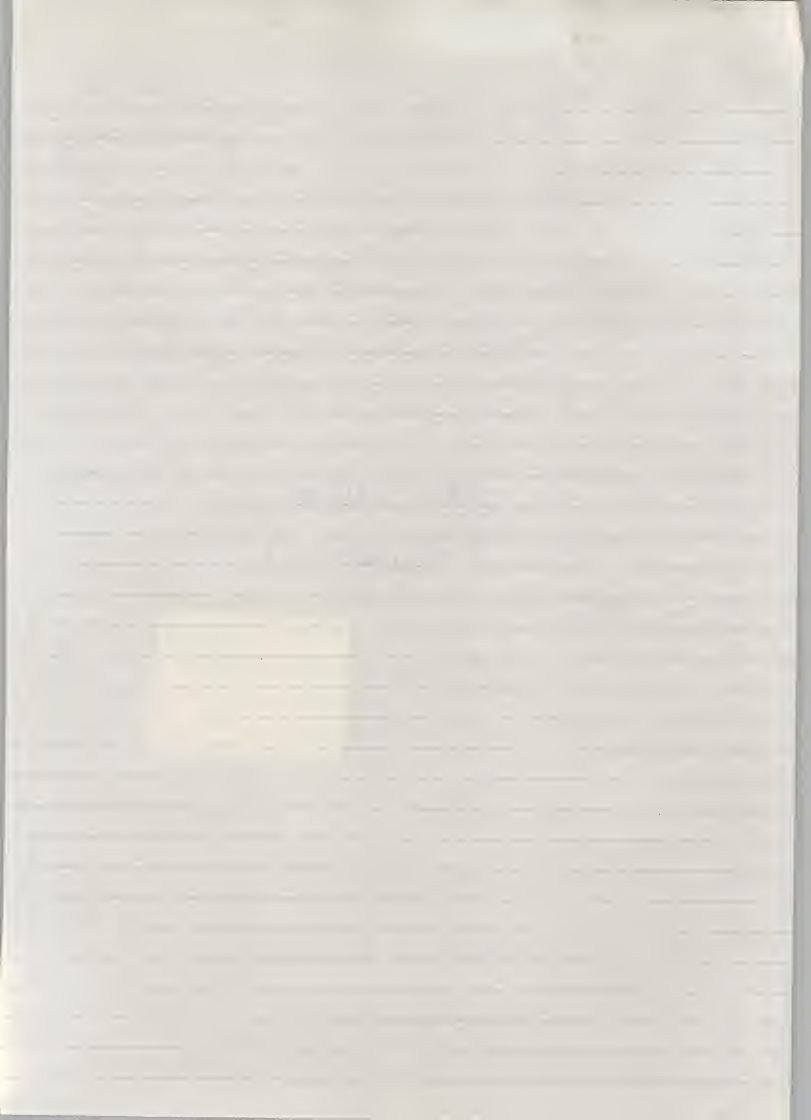
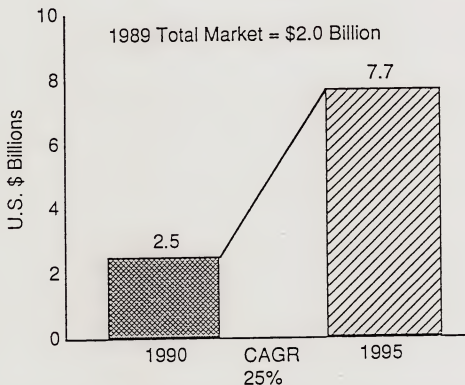


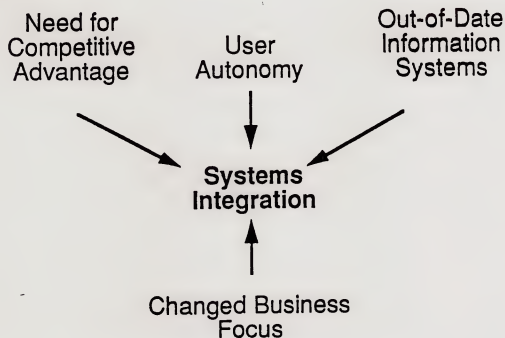
Exhibit III-1

Western European Systems Integration Market, 1990-1995

Western European Systems Integration Market
1990-1995



Systems Integration, Western Europe Driving Forces





(4)

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7

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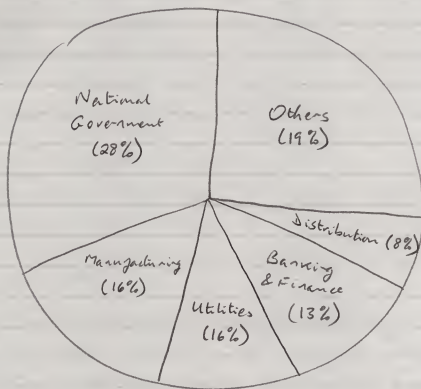


Systems Integration, Western Europe Strengths and Weaknesses of Professional Services Vendors

Strengths	Weaknesses
Relationship with IS management	Business consultancy skills
Project management skills	Perceived technical orientation
Implementation/technical skills	Lack of access to user top management



Industry Market Opportunities
Systems Integration, Western Europe



1990 Total Market = \$2.5 Billion

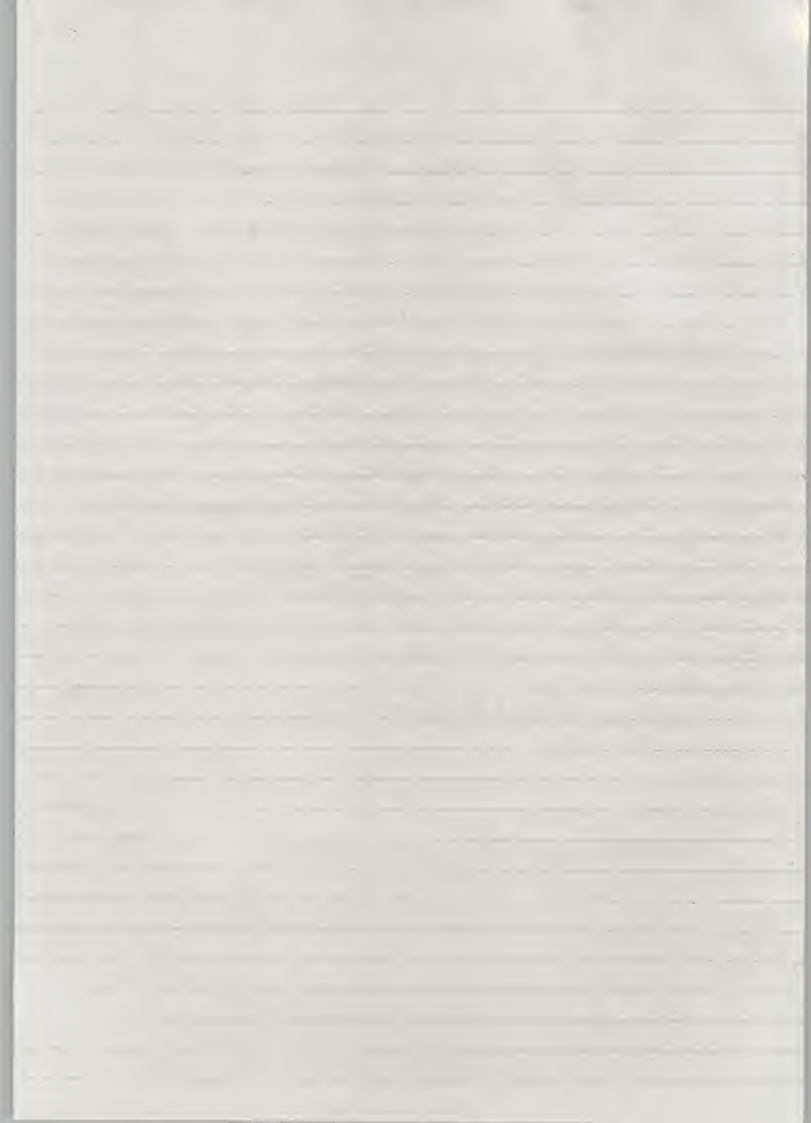


Exhibit VI-3

**Importance in Buying Process
Computer Integrated Manufacturing, Western Europe**

User Personnel	Degree of Importance
Top management	High
Manufacturing management	Medium - High
IS management	Medium - High



(12)

Exhibit VI-4

Importance in Lead Generation
Computer Integrated Manufacturing, Western Europe

Vendor Category Means of Lead Generation	Equipment Vendors	Professional Services Vendors	Application Software Product Vendors
Account Managers	High	Medium	High
New Business Sales Force	Medium	High	High
Collaboration Partners	Medium	High	Medium
External Consultants	Low	Medium	High

(13)

~~Appendix 11-16~~Vendor Issues: ~~Cooperation~~ *Alliances*

- *and*
IBM ~~&~~ *Coopers & Lybrand*
- IBM Approved Industrial Systems Integrators
- Cincom "CIM Alliance" Programme
- ~~Siemens and Lucas E & S~~
- ASK and EDS
- ~~Sligos and Mesarteam~~



Vendor Challenges Systems Integration, Western Europe

~~Business Consulting~~

- * Access to key decision makers

- * Integration architecture

- * Building key partnerships

~~Business Strategy~~

- * Open systems & product branding

- * Profitability

FROM INPUT LTD

5.23.1991 7:55

P. 1

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Piccadilly House, 33/37 Regent Street, London SW1Y 4NF Tel. (44) (071) 493-9335
Fax (44) (071) 629-0179

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ATTENTION: CHERYL / ANDREANUMBER OF PAGES: 1 of 1CONFIDENTIAL CORRESPONDENCE: Yes _____ No ☒URGENT: Yes ☒ No _____**DESCRIPTION:**

MEMAP - RF 5/91-12 Slides for Paris
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Also Slide 6 would look better with fewer
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TITLE PAGE

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Nouvelles Opportunités autour
de la Maintenance des
Logiciels Internes

Style like
presentations
1, 2, & 3

Roger Fulton

Consultant

the 1990s, the number of people with a mental health problem has increased by 50% (Mental Health Foundation 1999). The prevalence of mental health problems has increased in the general population, and the incidence of mental health problems has increased in the prison population.

There is a growing awareness of the need to address the mental health needs of prisoners. The Department of Health (1999) has published a strategy for mental health services, which includes a commitment to improve the mental health of prisoners. The Department of Health (1999) has also published a strategy for mental health services, which includes a commitment to improve the mental health of prisoners.

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weheads.

SLIDES FOR PARIS SEMINAR
31st MAY 1991

①.

Derived from ME-SM1 Exec Summary,

ME-SM1

EXH II-1

✓

Operational Software Support (Software Maintenance)

- Support and maintenance of in-house developed software
 - Two-thirds of all software activity
 - Today the smallest outsourced sector
- Largest services opportunity of the 1990s
- Centred on management issues

ME-SM1 Exhibit II-1

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INPUT

Note to graphics: please follow exhibit numbers on left hand side of page. Ignore the ones underneath the slides here.

Categories of Software by Source

- Class A In-house developed
- Class B Custom/contracted
- Class C Application products
- Class D System products

ME-SM1 Exhibit II-2

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INPUT

II-2

II-3

Software Maintenance Definitions

- Product Vendor
 - Fixing faults in software product
- Services Vendor
 - Keeping each client happy
- IS Management
 - Everything done after software goes live

ME-SM1 Exhibit II-3

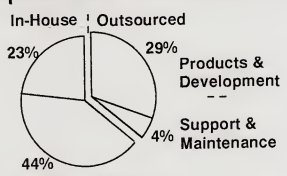
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New Slide

New

European User Software Budgets



1990 Total: \$90 Billion

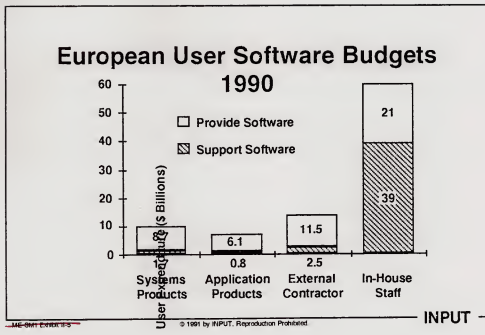
ME-SM1 Exhibit II-4

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INPUT



H-6
✓



H-13
✓

User Case Study - Government Sector

Problem - Operational Software Support

- Improve user service / lower costs

Solution - Outsourcing

Benefits

- >50% cost saving on staff ~\$70K p.a.
- 8 full-time staff replaced by 4 part-time
- System life extended 5 years

the 1990s, the number of people in the world who are obese has increased by 100% (World Health Organization 1997).

Obesity is a complex condition, with many causes and consequences. It is a condition that is associated with a number of health problems, including heart disease, diabetes, and certain types of cancer. It is also a condition that is associated with a number of social problems, including discrimination and stigma. The causes of obesity are complex, and include a combination of genetic, environmental, and behavioral factors. The consequences of obesity are also complex, and include a number of health and social problems. The purpose of this paper is to review the current state of knowledge about obesity, and to discuss the implications for public health and policy.

Obesity is a condition that is defined as an abnormal accumulation of fat in the body. It is a condition that is associated with a number of health problems, including heart disease, diabetes, and certain types of cancer. It is also a condition that is associated with a number of social problems, including discrimination and stigma. The causes of obesity are complex, and include a combination of genetic, environmental, and behavioral factors. The consequences of obesity are also complex, and include a number of health and social problems. The purpose of this paper is to review the current state of knowledge about obesity, and to discuss the implications for public health and policy.

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User Case Study - Telecommunications Sector

Problem - Operational Software Support

- Free-up staff & improve user service

Solution - Outsourcing

- Mix of in-house and 3rd-party staffing

Benefits

- 19 staff released for new projects
- Call-outs reduced ten-fold
- Working practices adopted by client

ME-SM1 Exhibit II-7

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INPUT

Operational Software Support - Outsourcing Benefits

- Contracted quality of service for users
 - Better performance and reliability
 - Running costs known, and reducing
- In-house staff released for new projects
- IS operational efficiency improved
 - Improved operations practices
 - Proven management techniques

ME-SM1 Exhibit II-8

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INPUT

II-18

Operational Software Support - Service Vendor Opportunities

- Support and maintenance contract
 - User service levels
 - Hand-over staffing and timing
- Emergency services
- Software maintenance/enhancement
- Procedures/methods enhancement
- Management control and reporting

ME-SM1 Exhibit II-9

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II-19

Operational Software Support - Product Vendor Opportunities

- Management tools:
 - User service levels
 - IS resources
 - Software
- Software engineering tools:
 - CASE tools, whole life-cycle
 - Reverse, re-engineering, conversion

ME-SM1 Exhibit II-10

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Conclusions

- Operational software support services
 - Un-tapped market opportunity
 - Total user spend ~\$40M
 - Less than 1% is outsourced
- Primary need is IS management skills rather than software engineering tools
- Natural fit in the systems operations market
- Strong vendor marketing is needed



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Re: slide #4 - we cannot locate
the presentation you referred to, so
please proof as is for layout

Re: slide #7 - please proof for
final (you had just sent complete slide in
fax of 23 May).

Thanks!

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DATE: 23 May

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Specify: _____



**Rappel des Domaines
d'Intervention
et d'Analyses d'INPUT**

Sylvie Bénech

INPUT

Application Domains
of
Dimensional
INPUT

Sylvia S. Smith

INPUT

INPUT

Logo ®
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INPUT

THINK

Is good
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INPUT Etude, Analyse, Conseille

- I** Industrie des Logiciels ^{et} ~~and~~ Services
- N** Numération, Evaluation des Marchés
- P** Prestations, Segmentation de l'Offre
- U** Utilisateurs, leurs Motivations ^{et} ~~and~~ Attentes
- T** Tendances d'Evolution, Anticipations

INPUT

INPUT BLOCKS, ANALYSIS, CONCEPTS

1. Input data and analysis

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Extra page -

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See what is
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I ↖ Industrie des Logiciels ^{et} ~~and~~ Services
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P ↖ Prestations, Segmentation de l'Offre
U ↖ Utilisateurs, leurs Motivations ^{et} ~~and~~ Attentes
T ↖ Tendances d'Evolution, Anticipations

INPUT

THEORY, ANALYSIS, AND DESIGN

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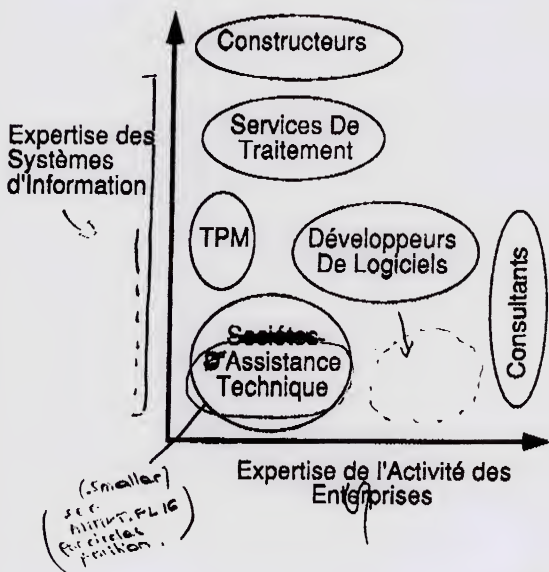
THEORY, ANALYSIS, AND DESIGN

THEORY

LOGICIELS ET SERVICES

Industrie des Services liés ~~aux Technologies de~~ l'Information

Nombreux sont les acteurs ...



Industry as a Strategic Resource

Journal of Management Education 37(1)



Numération ^{et} and Evaluation du Potentiel des Marchés

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- \$ Dépense finale des utilisateurs
- \$\$ Analyse des marchés non-captifs
- \$\$\$ Matériels exclus sauf en cas d'intégration
- \$\$\$\$ Europe—13 pays, USA, Japon, Monde

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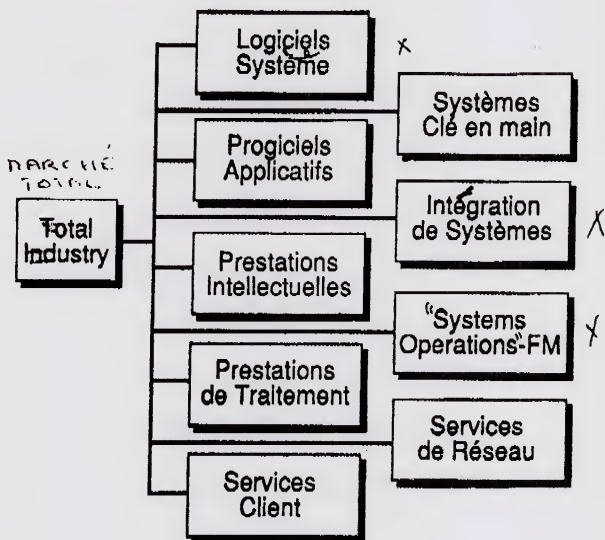
AJFRE-88 591- 5

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Validation and Evaluation of Patient Self-Reports

1. Deyoung, M. J. (1990). The validity of self-reports of patient health status.
2. Deyoung, M. J. (1991). The validity of self-reports of patient health status.
3. Deyoung, M. J. (1992). The validity of self-reports of patient health status.
4. Deyoung, M. J. (1993). The validity of self-reports of patient health status.

Prestations Offertes et Segmentation des Marchés

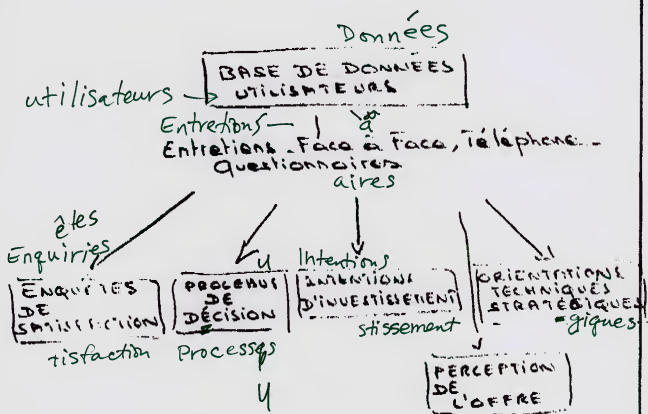


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Prozess der Mensch-Computer-Interaktion



Utilisateurs, Leurs Motivations, Leurs Attentes et



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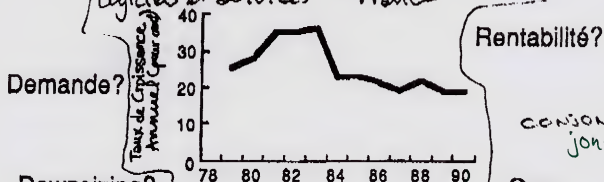
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University of International Law



Tendances d'Evolution des Marchés

Croissance 1978-1990 de l'Industrie des Logiciels et Services — France



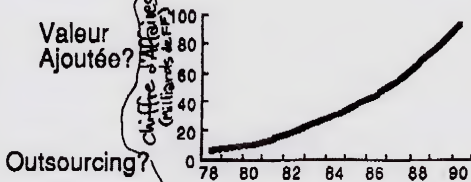
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Valeur Ajoutée?

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Concurrence?

Acquisitions?

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INPUT

AMMKT-PL-8

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Evolution of the Mammals

1. The first mammals appeared in the Triassic period, about 200 million years ago.

2. They were small, shrew-like animals that lived on the ground.

3. Over time, they evolved into a wide variety of species, including bats, whales, and humans.

4. The evolution of mammals is a complex process that has been studied by scientists for many years.

5. The study of mammal evolution helps us understand the history of life on Earth.

6. It also helps us understand the relationships between different species.

7. The evolution of mammals is a fascinating topic that continues to be studied today.

8. The study of mammal evolution is an important part of biology.

9. It helps us understand the diversity of life on Earth.

10. The evolution of mammals is a testament to the power of natural selection.

11. It shows how species can change over time to adapt to their environment.

12. The evolution of mammals is a story of survival and adaptation.

13. It is a story that has shaped the world we live in today.

14. The evolution of mammals is a testament to the resilience of life.

15. It is a story that inspires us to explore the mysteries of the universe.

16. The evolution of mammals is a journey that has taken us from the Triassic to the present.

17. It is a journey that has shaped the world we live in today.

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possible. Thank You

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Cheryl Tompkins or

Anna Trabucco

FROM: Anna Trabucco

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(to follow - from Sylvie).

Rappel des Domaines d'Intervention
et d'Analyses d'INPUT

Sylvie Bénéch

Directeur INPUT France.



INPUT®

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DESCRIPTION: 31 May Conference.

- ① Here is my presentation as announced
by Coupo.
I apologize as page 6 is not completed
I'll fax it to you tomorrow.
Don't hesitate to call me if problems.
Thanks to follow, same format as other spreads
- ② About INPUT - New French text.
You can cancel definitely the old version.
Thanks for your help - Regards. SPB.

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INPUT ETUDIE, ANALYSE, CONSEILLE.....

- I** Industrie des Logiciels & Services
- N** Numération, Evaluation des Marchés
- P** Prestations. Segmentation de l'Offre
- U** Utilisateurs. Leurs Motivations & Attentes
- T** Tendances d'Evolution, Anticipations

Deutsche Gesellschaft für
die Erforschung der
Geschichte der
Sprache und der
Literatur
Berlin

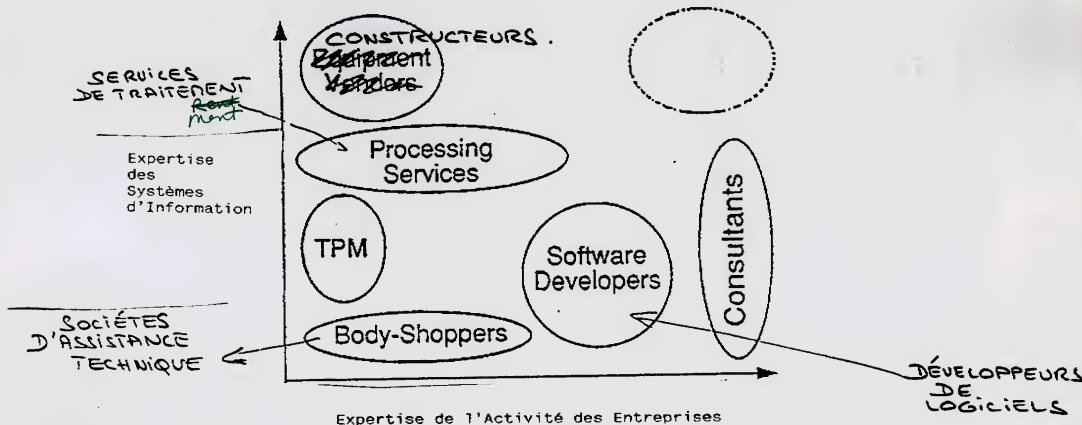
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II.. Industrie des Services liés aux Technologies de l'Information

Nombreux sont les acteurs....
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Expertise de l'Activité des Entreprises

University of
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University of TUM



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N... Numération & Evaluation du Potentiel des Marchés

- \$ Dépense finale des utilisateurs
- \$\$ Analyse des marchés non-captifs
- \$\$\$ Matériels exclus sauf en cas d'intégration
- \$\$\$\$ Europe - 13 pays, U.S.A, Japon, Monde

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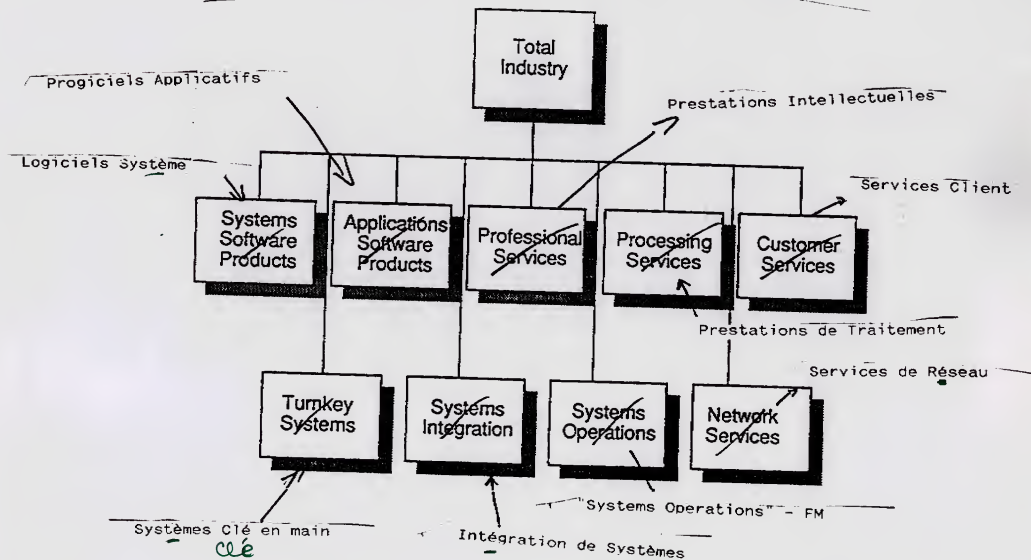
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P..... Prestations Offertes et Segmentation des Marchés

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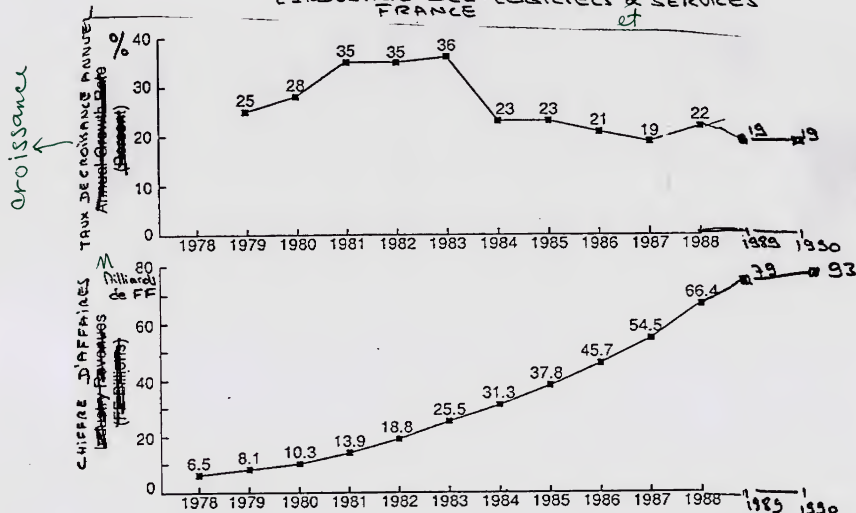
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..... Tendances d'Evolution des Marchés

CROISSANCE 1978-1990 DE
L'INDUSTRIE DES LOGICIELS & SERVICES
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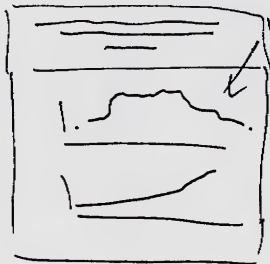
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DEMANDE ?

DOWNsizing ?

VALEUR AJOUTÉE ?
Valeur Ajoutée

OUTsOURCING ?



Very small.

RENTABILITÉ ?
rentabilité

OPEN SYSTEMS ?

EUROPE ?

ACQUISITIONS ?

CONCURRENCE ?

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ATTENTION: Andréa

NUMBER OF PAGES: 1 of 8

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URGENT: ☒ Yes ☐ No

DESCRIPTION: ① PAC speech on May 31.

- Please find attached PAC presentation Carol
asked me to prepare Friday evening.
I hope you will have time to prepare and
ship it. Final format is without binder just
with a stappled. If you could include also
French presentation + A propos d'INPUT
Quantity requests: 30. We will do here add on copies.
② Labels. We need to receive 50 white
labels for badges. Please send it also.

Thanks for your help

872

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Project Charge Code:

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INPUT France
24, av. du Recteur Poincaré
75016 PARIS

Tél (33-1) 46 47 65 65 Fax (33-1) 46 47 69 60

TO THE

MEMBERS OF THE BOARD OF DIRECTORS

OF THE

AMERICAN RED CROSS

WASHINGTON, D. C.

DEAR MR. BOARD:

I have the honor to acknowledge the receipt of your letter of the 10th inst.

and in reply to inform you that the same has been forwarded to the proper authorities for their consideration.

I am, Sir, very respectfully,
Yours,
Very truly,
J. H. HARRIS

Secretary

AMERICAN RED CROSS

WASHINGTON, D. C.

10th Nov 1917

Enclosed for the Board of Directors is a copy of the report of the Committee on the proposed amendment to the Constitution of the American Red Cross, as submitted by the Executive Committee at its meeting on the 27th of October, 1917.

The report is herewith submitted for the Board's consideration.

I am, Sir, very respectfully,
Yours,
Very truly,
J. H. HARRIS

Secretary

AMERICAN RED CROSS

WASHINGTON, D. C.

10th Nov 1917

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The report is herewith submitted for the Board's consideration.

I am, Sir, very respectfully,
Yours,
Very truly,
J. H. HARRIS

Secretary

AMERICAN RED CROSS

WASHINGTON, D. C.



INPUT
CONFERENCE du 31 Mai 1991
Peter A. Cunningham .
President

INFORMATION SYSTEMS MANAGEMENT
BY OUTSOURCING .

Hôtel Royal Monceau
Paris

புதுச்சேரி
(38) 27.12.2020 திருவிழா
கலாநாயகர் க. பி. பி.
புதுச்சேரி

புதுச்சேரி 18.12.2020 புதுச்சேரி
புதுச்சேரி 18.12.2020

புதுச்சேரி 18.12.2020
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1

Outsourcing represents
the future of the
information services
industry

00-4

INPUT

8

"Outsourcing" vs. Buying
Services

1980s: Services achieved
recognition

1990s: Overcome prejudice
against buying management
services

00-10

INPUT

10

Outsourcing in the 1990s
What is Different

- Size and length of commitment
- Breadth of responsibility
assumed by vendor
- Partnership versus
supplier/subcontractor

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19

Outsourcing in the 1990s
What is Different

- Complexity of IT solutions
- Professional services component
- Systems management

00-00

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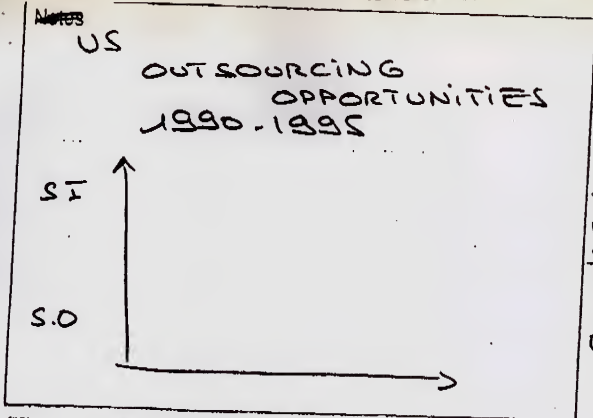
20

1. *Staphylococcus aureus*
Gram positive cocci
arranging in clusters
coagulase +

2. *Streptococcus pyogenes*
Gram positive cocci
arranging in chains
coagulase -
Dermatogen +

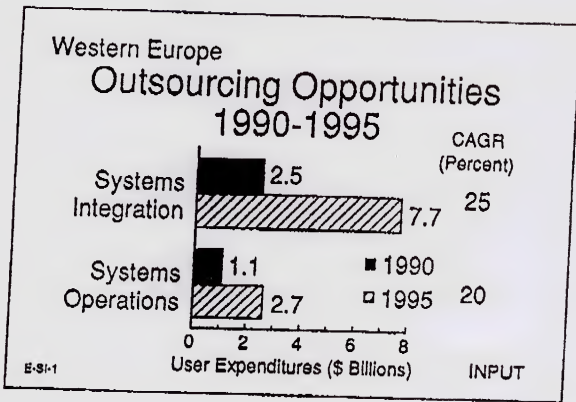
3. *Streptococcus pneumoniae*
Gram positive cocci
arranging in pairs
coagulase -
Dermatogen -

4. *Streptococcus viridans*
Gram positive cocci
arranging in chains
coagulase -
Dermatogen -



Andrea
 < could
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 US.

4/1/81 E-OU-1



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Systems Operations, Western Europe

Market Forecast

Country	\$ Millions			
	1990	1991	CAGR (%)	1995
France	297	353	19	713
Germany	75	87	18	169
U.K.	301	371	23	832
Italy	150	182	22	400

E-SO-5

INPUT

Notes

SYSTEMS INTEGRATION, WESTERN EUROPE

MARKET FORECAST

Country	US \$ millions \$ millions				
	1989	1990	1991	1995	1995 CAGR (Percent)
France	440	560	715	1,830	27
Germany	785	610	775	1,930	26
United Kingdom	505	625	770	1,770	23
Italy	180	230	300	760	27

1991

E-SI-23

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INPUT

Page 2 of 2

Market Forecast

Market Forecast			
Year	Q1	Q2	Q3
2017	10	15	20
2018	15	20	25
2019	20	25	30
2020	25	30	35

Market Forecast for 2017-2020

Market Forecast

Market Forecast			
Year	Q1	Q2	Q3
2017	10	15	20
2018	15	20	25
2019	20	25	30
2020	25	30	35

4

Outsourcing Vendors

- Approaches differ greatly
- Variety of capabilities needed
- Partnerships/alliances result

INPUT

Outsourcing Relationship Classification

Relationship Type	Outsourcing Category	Relationship Characteristics
Partnership-Based	Applications Management	Management-oriented Broad scope Open-ended timing

INPUT

Outsourcing Relationship Classification

Relationship Type	Outsourcing Category	Relationship Characteristics
Partnership-Based	Systems Operations	Broad expertise Personnel transfer Flexible agreement Service levels

INPUT

Outsourcing Relationship Classification

Relationship Type	Outsourcing Category	Relationship Characteristics
Objective-Based	Transition Management	Project-oriented Specific scope Specific timing

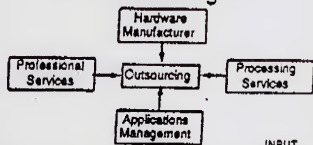
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Outsourcing Relationship Classification

Relationship Type	Outsourcing Category	Relationship Characteristics
Objective-Based	Applications Maintenance	Specific expertise Focused agreement Target dates
	Systems Integration	

INPUT

Vendor Orientation to Outsourcing



INPUT

12/13/90

5

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INPUT

Company Vehicle

1. Vehicle
2. Make
3. Model
4. Year
5. License
6. VIN

Minimum Requirements

1. Driver's License
2. Insurance
3. Safety
4. Maintenance

Company Vehicle Policy

1. Use
2. Fuel
3. Maintenance
4. Insurance
5. Safety
6. Driver's License

Company Vehicle Policy

1. Use
2. Fuel
3. Maintenance
4. Insurance
5. Safety
6. Driver's License

Company Vehicle Policy



Company Vehicle Policy

1. Use
2. Fuel
3. Maintenance
4. Insurance
5. Safety
6. Driver's License

(5)

1 →

Organizational Impacts

Group	Impacts
Total Organization	No visible impact Reallocation of personnel Faster access to skills More disciplined implementation

OU-34

INPUT

36

5

Organizational Impacts

Group	Impacts
Information Systems Management	Manage a smaller organization Shift to tactics and strategy Time available for planning

OU-37

INPUT

37

C

Organizational Impacts

Group	Impacts
Information Systems Professional	Significant initial anxiety Greater career opportunities

OU-38

INPUT

38

D

Conclusions User View

- Outsourcing is different for the 1990s
- Outsourcing offers new opportunities
- Outsourcing can lead to faster response
- Outsourcing can help IS change its role

OU-39

INPUT

39

Organizational Chart

Position	Name
President	John Doe
Vice President	Jane Smith
Secretary	Bob Johnson
Treasurer	Alice Brown

Departmental Structure

Department	Manager
Marketing	David Lee
Sales	Emily White
Production	Frank Green
Finance	Grace Black

Functional Structure

Function	Manager
Marketing	David Lee
Sales	Emily White
Production	Frank Green
Finance	Grace Black

Matrix Structure

Project	Manager
Project A	David Lee
Project B	Emily White
Project C	Frank Green
Project D	Grace Black

(6)

INPUT.

Andrea, please add after this page
my presentation - starting with
INPUT étude, analyse, conclusion...

...

=> 6 pages.

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E-MS-3

12

TOSHI

1. The first part of the book is a history of the Japanese people from the beginning of time to the present. It is a very interesting and informative book.

2. The second part of the book is a history of the Japanese people from the beginning of time to the present.

3. The third part of the book is a history of the Japanese people from the beginning of time to the present.

4. The fourth part of the book is a history of the Japanese people from the beginning of time to the present.

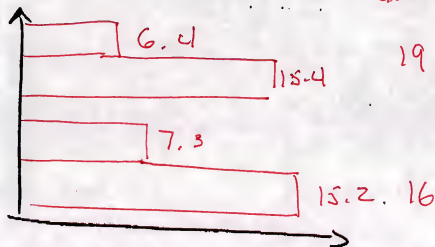
Notes

US

OUTSOURCING OPPORTUNITIES 1990-1995

CAGR

SI



S.O.

Andrea
 ← could you ask the research to provide you equivalent figures than European ones for US.

5/1/91

00-

(\$ Billions)

User Expenditures

K

Western Europe

Outsourcing Opportunities 1990-1995

Systems

2.5

CAGR
 (Percent)



INPUT
Conférence du 31 Mai 1991
Peter A. Cunningham
President
Information Systems Management
by Outsourcing

Hôtel Royal Monceau

Paris

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Tel. (33-1) 46 47 65 65
Tel. (0) 6447-7229



Outsourcing represents the future of the information services industry

OU-8

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Notes



"Outsourcing" vs. Buying Services

1980s: Services achieved recognition

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OU-10

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Notes



Outsourcing in the 1990s What is Different

- Size and length of commitment
- Breadth of responsibility assumed by vendor
- Partnership versus supplier/subcontractor

OU-19

INPUT

Notes

THE HISTORY OF THE

REPUBLIC OF THE UNITED STATES OF AMERICA

FROM THE FOUNDATION OF THE COLONIES TO THE PRESENT

BY

JOHN F. JOHNSON

OF THE

UNIVERSITY OF CHICAGO

AND

OF THE

AMERICAN HISTORICAL ASSOCIATION

AND

OF THE

AMERICAN SOCIETY OF COLLEGE HISTORIANS

AND

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AMERICAN HISTORICAL ASSOCIATION

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OU-20

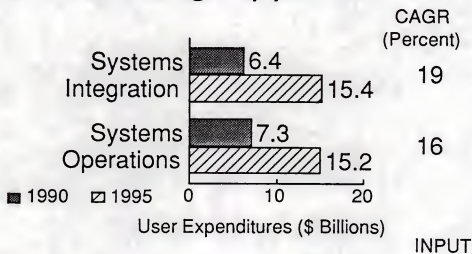
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Notes



U.S.

Outsourcing Opportunities



E-OU-1

Notes

5/28/91

PROCEEDINGS OF THE

ANNUAL MEETING OF THE

AMERICAN SOCIETY OF CLIMATE ENGINEERS

Held at the

Hotel New York, New York

December 1-3, 1964

Published by the

American Society of Climate Engineers

1111 Avenue of the Americas, New York, N.Y. 10020

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Printed in the United States of America

Library of Congress Catalog Card No. 64-10000

For a complete list of publications, contact the

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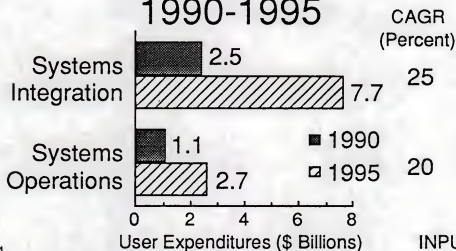
American Society of Climate Engineers

1111 Avenue of the Americas, New York, N.Y. 10020

Western Europe

Outsourcing Opportunities

1990-1995



E-SI-1

Notes



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E-SO-5

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E-SI-23

INPUT

Notes



Outsourcing Vendors

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- Variety of capabilities needed
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OU-13

INPUT

Notes



Outsourcing Relationship Classification

Relationship Type	Outsourcing Category	Relationship Characteristics
Partnership-Based	Applications Management	Management-oriented Broad scope Open-ended timing

OU-26

INPUT

Notes

Pharmaceutical Industry's Role in the Development of New Drugs

Pharmaceutical industry's role in the development of new drugs is a topic of ongoing debate.

The pharmaceutical industry has been a major force in the development of new drugs.

However, the industry's role in the development of new drugs is often questioned.

Some argue that the industry's primary motivation is profit, not patient care.

Others argue that the industry's research and development efforts are essential for the development of new drugs.

The debate continues, with each side presenting its own arguments.

It is clear that the pharmaceutical industry plays a significant role in the development of new drugs.

However, the industry's role must be carefully monitored to ensure that it is in the best interests of patients.

The pharmaceutical industry's role in the development of new drugs is a complex issue.

It requires a careful balance of interests and a commitment to patient care.

Only through a transparent and accountable process can the industry's role be properly evaluated.

The pharmaceutical industry's role in the development of new drugs is a topic that deserves continued attention.

As the industry continues to evolve, it is essential that we remain vigilant in our oversight.

The pharmaceutical industry's role in the development of new drugs is a topic that is always relevant.

As we move forward, we must ensure that the industry's actions are always in the best interests of patients.

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Outsourcing Relationship Classification

Relationship Type	Outsourcing Category	Relationship Characteristics
Partnership-Based	Systems Operations	Broad expertise Personnel transfer Flexible agreement Service levels

OU-27

INPUT

Notes

Outsourcing Relationship Classification

Relationship Type	Outsourcing Category	Relationship Characteristics
Objective-Based	Transition Management	Project-oriented Specific scope Specific timing

OU-28

INPUT

Notes



Outsourcing Relationship Classification

Relationship Type	Outsourcing Category	Relationship Characteristics
Objective-Based	Applications Maintenance	Specific expertise Focused agreement Target dates
	Systems Integration	

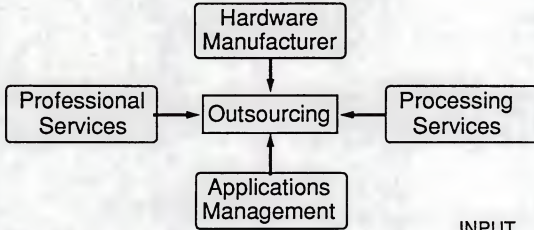
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OU-29

Notes



Vendor Orientation to Outsourcing



OU-30

INPUT

Notes



Organizational Impacts

Group	Impacts
Total Organization	No visible impact Reallocation of personnel Faster access to skills More disciplined implementation

OU-36

INPUT

Notes



Organizational Impacts

Group	Impacts
Information Systems Management	Manage a smaller organization Shift to tactics and strategy Time available for planning

OU-37

INPUT

Notes



Organizational Impacts

Group	Impacts
Information Systems Professional	Significant initial anxiety Greater career opportunities

OU-38

INPUT

Notes



Conclusions User View

- Outsourcing is different for the 1990s
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- Outsourcing can help IS change its role

INPUT

OU-39

Notes



INPUT

E-MS-3

Notes

5/28/91

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**Domaines d'Intervention
et d'Analyse
d'INPUT**

Sylvie Bénech



INPUT

INPUT



INPUT Etudie, Analyse, Conseille

Industrie des Logiciels et Services

Numération, Evaluation des Marchés

Prestations, Segmentation de l'Offre

Utilisateurs, leurs Motivations et Attentes

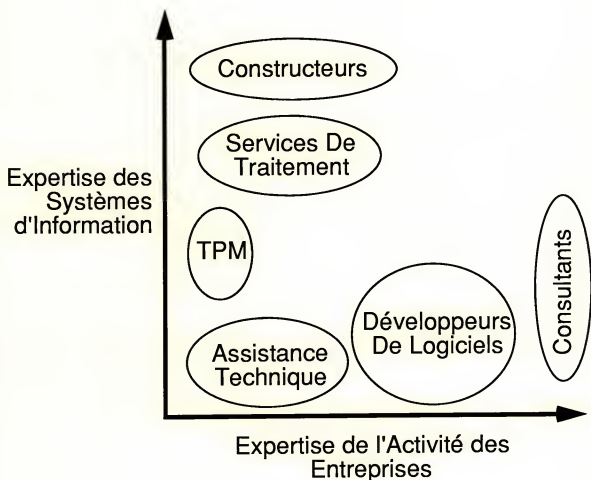
Tendances d'Evolution, Anticipations

INPUT



Industrie des Logiciels et Services

Nombreux sont les acteurs . . .



INPUT



Numération et Evaluation du Potentiel des Marchés

\$ Dépense finale des utilisateurs

\$\$ Analyse des marchés non-captifs

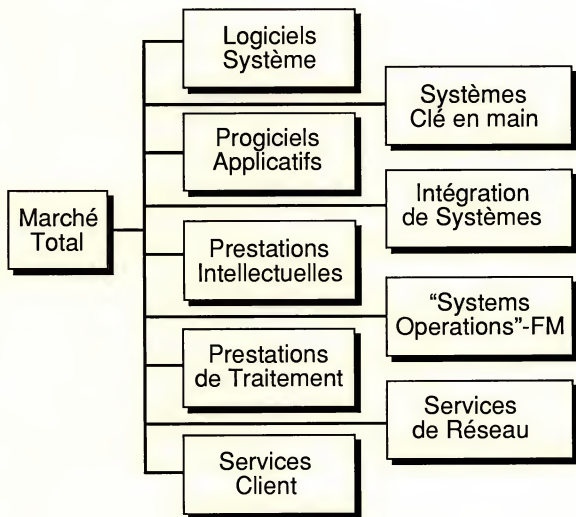
\$\$\$ Matériels exclus sauf en cas d'intégration

\$\$\$\$ Europe—13 pays, USA, Japon, Monde

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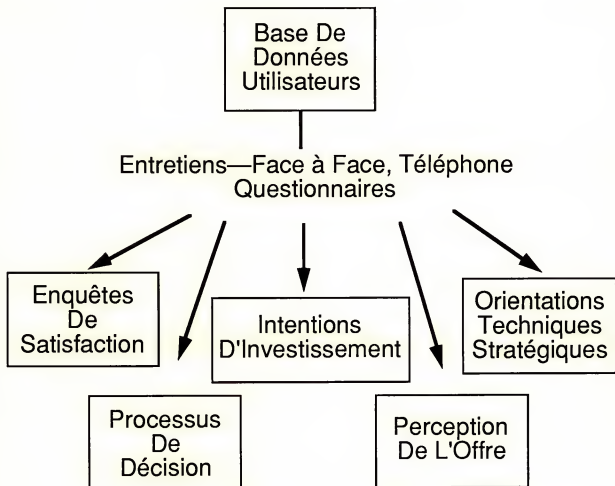
Prestations Offertes et Segmentation des Marchés



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Utilisateurs, Leurs Motivations et Attentes



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Tendances d'Evolution des Marchés

Demande?

Valeur Ajoutée?

Outsourcing?

Downsizing?

Concurrence?

Acquisitions?

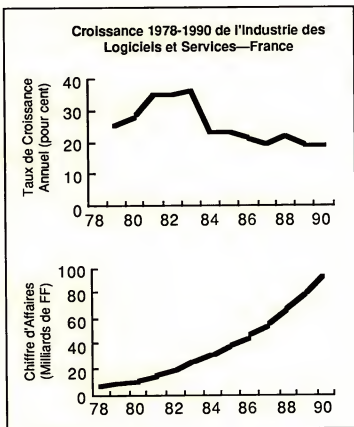
Technologies?

Rentabilité?

Conjoncture?

Open Systems?

Europe?



INPUT



A propos d' INPUT

INPUT, société Internationale, leader dans l'analyse des Marchés des Services liés aux Technologies de l'Information, délivre des études marketing et du conseil à l'ensemble des prestataires impliqués sur ces marchés.

Depuis sa création en 1974, INPUT analyse en permanence les différents segments du marché—prestations intellectuelles et de traitement, logiciels système et applicatifs, systèmes clé en main, services de réseau, services client, intégration de systèmes, FM—et leur pénétration par secteur vertical (banque, assurance, industrie, distribution).

Les interventions d'INPUT peuvent satisfaire des besoins d'informations opérationnels, tactiques et stratégiques (analyse de concurrence, attentes d'utilisateurs, potentiel de marché, recherche de partenaire...).

Les ressources d'INPUT sont accessibles sous forme de souscription à des programmes annuels, d'acquisition d'études multi-clients, de recherches spécifiques et confidentielles, de participation aux conférences spécialisées, d'abonnement à des newsletters.

La société compte plus de 100 personnes dans le monde dont une cinquantaine de consultants, experts sur les Marchés des Logiciels et Services.

INPUT bénéficie de références de clients notoires et parmi les plus importantes sociétés mondiales dont elle accompagne depuis de nombreuses années la croissance.

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International

London

Piccadilly House
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Paris

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75016 Paris, France
(33-1) 46 47 65 65 Télécopie (33-1) 46 47 69 50

Frankfurt

Sudetenstrasse 9
D-6306 Langgöns-Niederkleen, Germany
19.49.0 6447 7229 Télécopie 19.49.0 6447 7327

Tokyo

Saida Building
4-6, Kanda Sakuma-cho
Chiyoda-ku, Tokyo 101, Japon
19.81.3 3864 0531
Télécopie 19.81.3 3864 4114

