

## YWBS - USER SURVEY TABULATION

04/27/91

| Co Name                        | Ind   | S1.0 | 1.1    | 1.2 | 1.3 | 11.5 | 2.0 | 2.1   | 2.2   | 2.3   | 2.4   | 2.5   | 2.6a  | 2.6b | 2.7a | 2.7b | 2.8a | 2.8b | 2.9a | 2.9b | 3.0a | 3.0b |
|--------------------------------|-------|------|--------|-----|-----|------|-----|-------|-------|-------|-------|-------|-------|------|------|------|------|------|------|------|------|------|
| GENERAL ELECTRIC NUCLEAR ENER  | BSVcs | S    | 15,000 | 85  | 15  | 2 N  | 0   | 2,400 | 500   | 0     | 540   | 1,000 | I     | 15   |      |      |      |      |      | D    | 50   |      |
| HARTE HANKS POTPURRI           | BSVcs |      |        |     |     |      |     | 0     |       |       |       |       |       |      |      |      |      |      |      |      |      |      |
| LOCKHEED MISSILE & SPACE CO    | DMan  | M    | 75,000 | 325 | 450 | 27 Y |     | 500   | 300   |       | 100   |       | R     |      |      |      | R    |      |      |      |      |      |
| INTEL CORP                     | DMan  | M    | 60,000 | 300 | 90  | 20 Y | 75  | 2,454 | 350   | 75    | 2,000 |       | I     | 30   | R    |      | I    | 30   |      |      |      |      |
| ROLM CORPORATION               | DMan  | S    | 48,000 | 180 | 30  | 40 Y | 10  | 4,000 | 400   | 235   | 3,500 |       | D     | 40   |      |      | D    | 40   |      |      |      |      |
| AMD ADVANCED MICRO DEVICES     | DMan  | M    | 35,000 | 150 | 45  | 25 Y | 100 | 900   | 500   |       | 400   |       | I     | 50   |      | I    | 50   |      |      |      |      |      |
| VARIAN ASSOC                   | DMan  | S    | 13,000 | 88  | 14  | 3 N  |     | 850   | 100   |       | 750   |       | I     | 25   |      | I    | 25   |      |      |      |      |      |
| NATIONAL SEMICONDUCTOR CORP    | DMan  | S    | 10,000 | 125 | 380 | 1 N  |     | 400   | 50    | 0     | 350   |       | 0     | R    |      | R    |      | R    |      | R    |      |      |
| NORTHERN TELECOM               | DMan  | S    | 9,000  | 20  | 10  | 24 Y | 200 | 600   | 300   |       | 200   | 100   | R     |      |      | I    | 20   | I    | 20   |      |      |      |
| XEROX ENGINEERING SYSTEMS      | DMan  | S    | 9,000  | 31  | 12  | 2 N  |     | 1,700 | 300   |       | 900   | 500   | I     | 30   |      | I    | 20   | I    | 20   |      |      |      |
| 3 COM CORPORATION              | DMan  | S    | 8,000  | 60  | 8   | 9 Y  | 4   | 1,180 | 300   | 200   | 680   |       | I     | 20   |      | I    | 43   |      |      |      |      |      |
| HEWLETT PACKARD-INFO TECH DIV  | DMan  | S    | 5,400  | 34  | 12  | 1 Y  | 20  | 1,500 | 750   |       | 750   |       | I     | 30   |      |      |      |      |      |      |      |      |
| SAN JOSE MERCURY AND NEWS      | DMan  | S    | 5,000  | 25  | 15  | 5 N  | 0   | 100   | 100   |       |       |       | R     |      |      |      |      |      |      |      |      |      |
| SILICONIX                      | DMan  | S    | 4,600  | 33  | 0   | 4 N  | 0   | 1,600 | 100   | 1,400 | 100   |       | R     |      | I    | 10   | R    |      | R    |      | R    |      |
| FUJITSU                        | DMan  | M    | 4,000  | 25  | 25  | 25 Y | 14  | 450   | 200   | 150   | 100   |       | I     | 25   | I    | 10   | R    |      | I    |      |      |      |
| WATKINS JOHNSON                | DMan  | S    | 4,000  | 15  | 20  | N    | 0   | 1,000 | 750   | 200   | 50    | 0     | 0     | I    |      | I    |      | I    |      | I    |      |      |
| PRECISION MONOLITHICS          | DMan  | M    | 2,400  | 9   | 5   | 1 N  | 0   | 400   | 250   | 65    | 70    |       | R     |      | R    |      | R    |      |      |      |      |      |
| CHIPS AND TECHNOLOGIES         | DMan  | S    | 1,500  | 3   | 0   | 0 Y  | 5   | 325   | 50    | 25    | 240   |       | D     | 25   |      | R    |      |      |      |      |      |      |
| Spectra Physics Lasers         | Dman  | S    | 1,200  | 4   | 5   | 1 N  |     | 98    |       | 30    | 68    |       | I     | 99   | I    | 10   | I    | 99   |      |      |      |      |
| BORLAND INTL                   | EDP   | S    | 18,000 | 22  | 4   | Y    | 60  | 3,100 | 700   | 1,500 | 200   |       | 65    | I    | 90   | D    | 75   | I    | 45   |      |      |      |
| ASK COMPUTER SYSTEMS           | EDP   | M    | 10,000 | 32  | 15  | 2 N  | 0   | 2,500 | 300   |       | 45    | 0     | 1,700 | I    | 12   |      | I    | 12   |      | I    | 12   |      |
| MIPS COMPUTER SYSTEMS          | EDP   | S    | 5,700  | 23  | 2   | 1 Y  | 0   | 1,000 | 500   | 40    | 400   |       | I     | 20   |      | I    | 10   |      |      |      |      |      |
| COMPUTER ASSOCIATES            | EDP   | S    | 250    | 4   |     | N    |     | 16    | 8     |       | 8     |       | I     | 20   |      | I    | 20   |      |      |      |      |      |
| STANFORD UNIVERSITY            | Educ  | M    | 40,000 | 170 | 60  | 70 Y | 300 | 6,000 | 3,600 | 1,500 | 900   |       | I     | 5    | R    |      | R    |      | R    |      | R    |      |
| SAN JOSE STATE UNIVERSITY      | Educ  | S    | 7,000  | 15  | 25  | 5 Y  | 20  | 310   | 200   | 10    | 100   |       | 0     | R    |      | R    |      |      |      |      |      |      |
| UNIV OF CALIF-SANTA CRUZ-LIBR  | Educ  | S    | 2,530  | 19  | 11  | 5 Y  | 15  | 0     | 0     |       | 0     | 0     | 0     | I    | 50   |      | R    |      |      |      |      |      |
| SANTA CLARA UNIVERSITY         | Educ  | S    | 1,700  | 10  | 9   | 3 Y  | 3   | 450   | 365   | 50    | 140   | 0     | 0     | D    |      | R    | D    | 20   |      |      |      |      |
| HARTNELL COMM COLLEGE          | Educ  | S    | 455    | 1   | 3   | 1 N  |     | 58    | 8     |       | 50    |       | I     | 30   |      | I    | 20   |      |      |      |      |      |
| CITY OF SANTA CRUZ SCHOOL DIST | Educ  | S    | 361    | 1   | 1   | 1 N  | 0   | 25    | 20    |       | 3     |       | R     |      |      | R    |      |      |      |      |      |      |
| ALUM ROCK SCHOOL DISTRICT      | Educ  | S    | 300    | 3   | 2   | 2 N  |     | 19    | 4     |       | 15    |       | R     |      |      |      |      |      |      |      |      |      |
| EL CAMINO HOSPITAL             | Med   | M    | 3,300  | 18  | 4   | 1 Y  | 1   | 1,670 | 600   |       | 70    |       | 1,000 | R    |      | I    | 35   | I    | 99   |      |      |      |
| COMM HOSPITAL OF MONTEREY      | Med   | S    | 3,000  | 7   | 9   | 1 Y  |     | 170   | 100   | 55    | 15    |       | I     | 10   |      |      |      |      |      |      |      |      |
| SAN JOSE MEDICAL CENTER        | Med   | S    | 2,200  | 4   | 9   | 6 Y  | 0   | 1,107 | 1,100 |       | 7     | 0     | 0     | D    | 30   |      | R    |      |      |      |      |      |
| SANTA CRUZ MEDICAL CLINIC      | Med   | S    | 520    | 3   | 6   | 1 N  | 0   | 12    | 0     | 12    | 0     | 0     | 0     | R    |      | R    |      |      |      |      |      |      |
| MONTEREY MUSHROOM CO           | Misc  | S    | 700    | 4   | 0   | 1 Y  |     | 55    |       |       | 55    |       | I     | 12   |      | R    |      |      |      |      |      |      |
| RAISCH                         | Misc  | S    | 100    | 2   |     | 1 N  |     | 7     |       | 1     | 6     |       | I     | 10   |      | I    | 10   |      |      |      |      |      |



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| Co Name                        | 3.1 | 3.2 | 4.0 | 4.0b4 | 1a4 | 1b4 | 2a4 | 2b4 | 3a4 | 3b4 | 4a4 | 4b4 | 5a4 | 5b5 | 0.5 | 1     | 5.2 | 5.3 | 5.4 | 5.5 | 5.6 | 5.7 | 6.1   | 6.2 | 6.3   | 6.4 | 6.5 |
|--------------------------------|-----|-----|-----|-------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-------|-----|-----|-----|-----|-----|-----|-------|-----|-------|-----|-----|
| GENERAL ELECTRIC NUCLEAR ENER  | N   |     | 1   | 50    | 0   |     | 1   | 18  | 3   | 12  | 2   | 12  | 5   | 8   | Y   | 1,000 |     |     | Y   |     |     | 100 | N     |     |       | Y   |     |
| HARTE HANKS POTPURRI           |     |     |     |       |     |     |     |     |     |     |     |     |     |     |     |       |     |     |     |     |     |     |       |     |       |     |     |
| LOCKHEED MISSILE & SPACE CO    | Y   | X   | 1   | 20    | 1   |     | 1   |     | 1   |     | 3   | 55  | 2   | 25  | N   |       |     |     | N   |     |     |     | N     |     |       | N   |     |
| INTEL CORP                     | Y   | X   | 2   | 50    |     |     |     |     |     |     | 3   | 20  | 3   | 30  | N   |       |     |     | N   |     |     |     | N     |     |       | N   |     |
| ROLM CORPORATION               | Y   | X   | 5   | 95    | 1   | 0   | 1   | 0   | 1   | 0   | 5   | 5   | 1   | 0   | N   |       |     |     | N   |     |     |     | N     |     |       | N   |     |
| AMD ADVANCED MICRO DEVICES     | Y   | X   | 2   | 25    | 1   | 0   | 2   | 25  | 1   | 0   | 4   | 25  | 4   | 25  | N   |       |     |     | Y   |     | 100 |     | N     |     |       | N   |     |
| VARIAN ASSOC                   | N   |     | 3   | 80    |     |     |     | 2   | 5   | 3   | 5   | 3   | 10  | N   |     |       |     |     | N   |     |     |     | N     |     |       | Y   |     |
| NATIONAL SEMICONDUCTOR CORP    | Y   | X   | 1   | 93    |     |     |     |     |     |     | 1   | 7   |     | N   |     |       |     |     | N   |     |     |     | N     |     |       | N   |     |
| NORTHERN TELECOM               | Y   | X   | 3   | 70    |     |     |     |     |     |     | 3   | 30  |     | Y   |     | 350   |     |     | Y   |     | 100 |     |       |     |       |     |     |
| XEROX ENGINEERING SYSTEMS      | N   |     | 5   | 70    | 1   |     | 1   |     | 1   |     | 5   | 20  | 5   | 10  | N   |       |     |     | Y   |     | 50  | 50  | 50    | N   |       | N   |     |
| 3 COM CORPORATION              | Y   | X   | 2   | 10    |     |     |     |     |     |     | 2   |     |     | N   |     |       |     |     | N   |     |     |     | N     |     |       | N   |     |
| HEWLETT PACKARD-INFO TECH DIV  | Y   | X   | 1   | 10    |     |     |     |     |     |     | 4   | 90  |     | N   |     |       |     |     | N   |     |     |     | N     |     |       | N   |     |
| SAN JOSE MERCURY AND NEWS      | X   |     | 1   | 0     | 1   | 0   | 1   | 0   | 1   | 0   | 1   | 0   | 1   | 0   | N   |       |     |     | N   |     |     |     | N     |     |       | N   |     |
| SILICONIX                      | Y   | X   | 1   | 10    | 1   |     | 4   | 10  | 2   | 10  | 5   | 70  | 3   |     | N   |       |     |     | N   |     |     |     | N     |     |       | N   |     |
| FUJITSU                        | Y   | X   | 2   | 50    | 1   |     | 2   |     | 1   |     | 5   | 50  | 2   |     | N   |       |     |     | Y   |     |     | 50  | N     |     |       | N   |     |
| WATKINS JOHNSON                | Y   | X   | 5   | 0     | 4   | 45  | 2   | 10  | 5   | 0   | 5   | 45  | 2   | 0   | N   |       |     |     |     |     |     |     | N     |     | Y     | 0   |     |
| PRECISION MONOLITHICS          | Y   | X   | 2   | 70    | 1   | 0   | 1   | 0   | 1   | 0   | 5   | 30  | 1   | 0   | N   |       |     |     | N   |     |     |     | N     |     |       | N   |     |
| CHIPS AND TECHNOLOGIES         | Y   | X   | 4   | 75    |     |     |     |     |     |     | 4   | 25  |     |     |     |       |     |     |     |     |     |     |       |     |       |     |     |
| Spectra Physics Lasers         | N   |     | 4   | 70    | 1   |     | 1   |     | 1   |     | 5   | 30  | 1   |     | N   |       |     |     | N   |     |     |     | N     |     |       | N   |     |
| BORLAND INTL                   | Y   | X   | 4   | 60    | 4   | 10  | 1   |     | 1   |     | 5   | 20  | 5   | 10  | N   |       |     |     | N   |     |     |     | N     |     | Y     |     |     |
| ASK COMPUTER SYSTEMS           | N   |     |     |       |     |     |     |     |     |     | 5   | 99  |     | N   |     |       |     |     |     |     |     | Y   | 1,700 |     |       | N   |     |
| MIPS COMPUTER SYSTEMS          | Y   | X   | 3   | 70    |     |     | 3   | 15  | 2   | 5   | 4   | 10  |     | N   |     |       |     |     | N   |     |     |     | N     |     |       | N   |     |
| COMPUTER ASSOCIATES            | Y   | X   |     |       |     |     |     |     |     |     | 2   | 99  |     | N   |     |       |     |     | N   |     |     |     | N     |     |       | N   |     |
| STANFORD UNIVERSITY            | Y   | X   | 1   | 25    |     | 0   | 0   |     | 1   | 10  | 2   | 25  | 5   | 15  | N   |       |     |     | N   |     |     |     | N     |     |       | N   |     |
| SAN JOSE STATE UNIVERSITY      | Y   | X   | 4   | 80    | 1   | 0   | 2   | 15  | 2   | 5   | 2   | 0   | 1   | 0   | N   |       |     |     | N   |     |     |     | N     |     |       | N   |     |
| UNIV OF CALIF-SANTA CRUZ-LIBR  | Y   | X   | 1   | 0     | 1   | 0   | 1   | 0   | 1   | 0   | 1   | 0   | 1   | 0   | N   |       |     |     | N   |     |     |     | N     |     |       | N   |     |
| SANTA CLARA UNIVERSITY         | N   | X   | 2   | 50    |     |     | 5   | 35  | 3   | 3   | 3   | 12  | 1   |     | N   |       |     |     | N   |     |     |     | N     |     |       | N   |     |
| HARTNELL COMM COLLEGE          | Y   | X   | 2   | 90    | 1   |     | 1   |     | 1   |     | 5   | 10  | 1   |     | N   |       |     |     | N   |     |     |     | N     |     |       | N   |     |
| CITY OF SANTA CRUZ SCHOOL DIST | Y   | X   | 4   | 50    |     |     |     |     |     |     | 4   | 50  |     |     | N   |       |     |     |     |     |     |     | N     |     |       | Y   |     |
| ALUM ROCK SCHOOL DISTRICT      | Y   | X   | 2   | 0     |     | 0   | 0   |     | 0   |     | 0   | 0   |     |     | N   |       |     |     | N   |     |     |     | N     |     |       | N   |     |
| EL CAMINO HOSPITAL             | Y   | X   | 4   | 80    | 2   |     | 1   |     | 1   |     | 5   | 10  | 5   | 10  | N   |       |     |     | Y   |     | 75  | 75  | 75    | Y   | 1,000 | N   |     |
| COMM HOSPITAL OF MONTEREY      | N   |     |     |       |     |     |     |     |     |     | 1   | 99  |     |     | N   |       |     |     | N   |     |     |     | N     |     |       | N   |     |
| SAN JOSE MEDICAL CENTER        | N   |     |     |       | 4   | 0   |     |     |     |     | 3   | 99  |     |     | N   |       |     |     | N   |     |     |     | N     |     |       | N   |     |
| SANTA CRUZ MEDICAL CLINIC      | N   |     |     |       |     |     |     |     |     |     |     |     |     |     | N   |       |     |     | N   |     |     |     | N     |     |       | N   |     |
| MONTEREY MUSHROOM CO           | Y   | X   | 4   | 80    |     |     |     |     |     |     | 3   | 20  |     |     | N   |       |     |     | N   |     |     |     | N     |     |       | N   |     |
| RAISCH                         | N   |     | 3   | 99    | 1   |     | 1   |     | 1   |     | 3   |     | 1   |     | N   |       |     |     | N   |     |     |     | N     |     |       | N   |     |



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|                                |     |    |    |     |    |     |    |     |    |     |    |     |      |     |     |    |     |    |    |    |    |    |     |    |   |
|--------------------------------|-----|----|----|-----|----|-----|----|-----|----|-----|----|-----|------|-----|-----|----|-----|----|----|----|----|----|-----|----|---|
| RFI                            | N   | 3  |    |     |    | 5   | 95 | 1   |    | 3   | 5  |     | N    |     |     | N  |     |    |    |    |    |    |     |    |   |
| SYNTEX CORPORATION             | Y X | 4  | 65 | 2   | 5  | 4   | 20 | 1   |    | 3   | 10 | 1   | N    | N   |     | N  |     |    |    |    |    |    |     |    |   |
| ALZA CORP                      | Y X | 1  |    | 2   |    | 4   |    | 1   |    | 5   | 99 | 2   | N    | N   |     | N  |     |    |    |    |    |    |     |    |   |
| TELEDYNE MCCORMICK SELPH       | N   | 1  |    |     |    |     |    |     |    | 5   | 99 |     | N    | N   |     | N  |     |    |    |    |    |    |     |    |   |
| VINTNERS INTERNATIONAL         | N   | 5  | 90 |     |    |     |    |     | 3  | 5   | 5  | 5   | N    | N   |     | N  |     |    |    |    |    |    |     |    |   |
| CNTY OF SANTA CLARA-Trans Dept | Y X | 2  | 10 | 1   | 5  | 1   | 5  | 2   | 5  | 4   | 65 | 3   | 20 Y | Y   | 100 | Y  | 60  | N  |    |    |    |    |     |    |   |
| CITY OF SAN JOSE               | Y X | 2  | 88 | 1   | 10 | 0   |    | 1   |    | 4   | 2  | 0   | N    | N   |     | N  |     |    |    |    |    |    |     |    |   |
| CITY OF MONTEREY               | Y X | 2  | 66 |     |    |     |    |     |    | 5   | 34 |     |      |     |     |    |     |    |    |    |    |    |     |    |   |
| TYMNET BRITISH TELECOM         | Y X | 2  | 40 | 1   |    | 3   | 45 | 3   | 10 | 5   | 5  | 1   | N    | N   |     | Y  | 200 | N  |    |    |    |    |     |    |   |
| OCTEL COMMUNICATIONS           | N   |    |    |     |    |     |    |     |    |     |    |     | N    | N   |     | N  |     |    |    |    |    |    |     |    |   |
| VIKING FREIGHT SYSTEMS         | N   | 3  | 80 |     |    |     |    |     |    | 3   | 20 |     | N    | N   |     | N  |     |    |    |    |    |    |     |    |   |
| SKYWAY FREIGHT SYKSTEM         | Y X | 1  | 10 |     |    |     |    |     |    | 4   | 90 |     |      |     |     |    |     |    |    |    |    |    |     |    |   |
|                                |     | 48 | 46 | 2.5 | 52 | 1.4 | 6  | 1.7 | 20 | 1.5 | 4  | 3.5 | 36   | 2.1 | 10  | 44 | 883 | 43 | 81 | 75 | 69 | 43 | 740 | 40 | 0 |



## User Questionnaire - YWIBS, Peninsula Market Study

*Interviewer Note:* In addition to the usual INPUT cover sheet, each questionnaire should be accompanied by the Computer Intelligence fact sheet giving overall installation parameters.

### DEMOGRAPHICS

- 1.0 Approximately what is your overall annual budget for information systems?

9,684 (000's)

How many employees are involved in delivering information services in the following categories?

- 1.1 <sup>53</sup>~~26~~ Systems Development/Maintenance/Support

- 1.2 ~~34~~ Processing/Operations

- 1.3 ~~8~~<sub>10</sub> Administration/Support Services

- 1.4 Are systems developed or maintained by other organization's within your company besides the information systems function?

50% (Y/N) (If no, skip to question 2.0)

- 1.5 If so, what is your estimate of how many people in the firm spend more than 50% of their time in that activity?

36

### OUTSIDE SERVICES

- 2.0 What is your total annual budget for the purchase of software and services on the outside?

983 (000's)

For each of the following categories, please indicate approximately how many dollars are spent annually for:

- 2.1 Applications and systems software? (E.G.; Operating systems, CASE products, data base management systems and applications packages.)

247 (000's)

- 2.2 Processing services? (E. G.; Payroll processing, batch processing services, other on-line processing or data retrieval services.)

1770 ~~2570~~ (000's)

- 2.3 Professional services? (E.G.; Contract services such as applications development, project management, systems programming, education and executive consulting related to information systems.)

2970 ~~1370~~ (000's)



- 2.4 Systems integration? (E.G.; One time contracts where the vendor assumes responsibility for the complete development and delivery of a systems development effort.)

13% (000's)

- 2.5 Systems operations? (E.G.; A long term contract where the vendor assumes operations and/or maintenance responsibility for a significant portion of the firm's processing.)

13% (000's)

For each of the areas discussed above, I would like to get your opinion of whether you see expenditures for that area increasing annually over the next 3 years, and by how much. (I=Increasing, D=Decreasing, R=Remains the same.) Also please indicate your opinion of the top two leading vendors in the area in question.

|     | CODE<br>(a) | %<br>(b) | FUNCTION              | LEADING VENDORS<br>(c) |          |          |            |
|-----|-------------|----------|-----------------------|------------------------|----------|----------|------------|
| 2.6 |             |          | Apps/Systems Software | I<br>53%               | D<br>11% | R<br>24% | 2550<br>47 |
| 2.7 |             |          | Processing Services   | 25%                    | 11%      | 61%      | 18         |
| 2.8 |             |          | Professional Services | 45%                    | 12%      | 46%      | 42         |
| 2.9 |             |          | Systems Integration   | 41%                    | 10%      | 50%      | 10         |
| 3.0 |             |          | Systems Operations    | 29%                    | 0%       | 76%      | 7          |

- 3.1 Does your organization/firm have a policy or established operating practice regarding the acquisition of some or all of these classes of services?

67% (Y/N) (If no, skip to question 4.0)

- 3.2 If so, could you please briefly describe the policy or practice?

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### SPECIFIC PROFESSIONAL SERVICES

For each of the following professional services please indicate on a scale of 1 - 5 with five being the highest, your tendency to go to an outside vendor for provision of the service. Also please indicate the estimated % of your budget you currently spend in that category, and your vendor of first choice. If you don't use the specific outside service in question, we would still be interested in your opinion as to who would be the vendor of first choice.

|     | RATE<br>(a) | %<br>(b)  | SERVICE                  | VENDOR OF CHOICE<br>(c) |
|-----|-------------|-----------|--------------------------|-------------------------|
|     |             |           |                          | <i>NORMALIZED %</i>     |
| 4.0 | <i>8.5</i>  | <i>52</i> | Applications Development | <i>47</i>               |
| 4.1 | <i>1.4</i>  | <i>6</i>  | Project Management       | <i>2</i>                |
| 4.2 | <i>1.7</i>  | <i>20</i> | Systems Programming      | <i>7</i>                |
| 4.3 | <i>1.5</i>  | <i>4</i>  | Software Installation    | <i>4</i>                |
| 4.4 | <i>8.5</i>  | <i>36</i> | Education                | <i>32</i>               |
| 4.5 | <i>2.1</i>  | <i>10</i> | Executive Consulting     | <i>8</i>                |

### SYSTEMS INTEGRATION

- 5.0 In the past three years has your firm ever used a systems integrator to take full responsibility for the design development and installation of a major application, upgrade or migration to a new operating environment or major network project?

*Y/N* (Y/N) (If no, skip to question 5.4)

If so, could you please indicate the approximate size of the project, the vendor and the give a brief description of the project scope.

|     | SIZE<br>(000's) | VENDOR<br>(b) | DESCRIPTION<br>(c)                            |
|-----|-----------------|---------------|-----------------------------------------------|
| 5.1 |                 |               | <i>AVERAGE PROJECT SIZE \$83,000</i>          |
| 5.2 |                 |               | <i>CITY OF SANTA CLARA TRANSPORTATION</i>     |
| 5.3 |                 |               | <i>NORTHERN TELECOM<br/>GE NUCLEAR ENERGY</i> |

- 5.4 Do you believe that you may undertake such as systems integration project over the next three years?

*16%* (Y/N) (If no, skip to question 6.1)



If you believe that you may undertake such a project over the next 3 years, please indicate the probability for each of the following three categories:

- 5.5 81% Applications Integration  
 5.6 75% Infrastructure (Operating Environment) Integration  
 5.7 49% Network Integration

What vendors would you consider for each class of project?

- 5.8 \_\_\_\_\_ Applications Integration  
 5.9 \_\_\_\_\_ Infrastructure Integration  
 6.0 \_\_\_\_\_ Network Integration

### SYSTEMS OPERATIONS

- 6.1 Do you currently have a contract with a systems operations or outsourcing firm for the management of a significant portion of your computer operations or applications maintenance?

2% (Y/N) (If no, skip to question 6.4)

If you do have such a contract or contracts, please indicate the approximate annual cost, the vendor, and provide a brief description of what has been outsourced.

|     | SIZE<br>(000's) | VENDOR<br>(b) | DESCRIPTION<br>(c)                                                          |
|-----|-----------------|---------------|-----------------------------------------------------------------------------|
| 6.2 |                 |               | <u>AVERAGE SIZE 740,000 / YEAR</u>                                          |
| 6.3 |                 |               | <u>ASE, EL CAMINO HOSPITAL</u><br><u>SANTA CLARA TRANSPORTATION, TYMNET</u> |

- 6.4 Do you believe that you will consider a systems operations contract sometime over the next three year time period.

13% (Y/N) (If no, skip to closing)

If you believe that you may consider an outsourcing over the next 3 years, please indicate the probability for each of the following two categories:

- 6.5 0% Applications Management  
 6.6 49% Systems Operations

Please indicate the top two vendors that you might contact for consideration as bidders for an outsourcing contract.

- 6.7 \_\_\_\_\_  
 6.8 \_\_\_\_\_



## **CLOSING**

*"Thank you for participating in our survey. We will be sending you the 'thank you' package that we discussed at the opening of the interview in April. If you have any additional questions regarding INPUT, its products or service, please feel free to contact us at our Mountain View office at 961-3300."*



|                   |       |         |   |                                                                                         |
|-------------------|-------|---------|---|-----------------------------------------------------------------------------------------|
| Monterey Mush     | Other |         |   | 3rd party s/w must not be modified                                                      |
| AMD               | DMan  |         |   | Always look for pkg first; no leading vendors - looking for specific skill set          |
| 3COM              | DMan  | 2.6     |   | Ask for financials/mfg; HP for image DB                                                 |
| UC St Cruz        | Educ  |         | x | Budget constraints                                                                      |
| Tymnet - BT       | Tele  | 6.2     |   | Disaster recovery                                                                       |
| Alza Corp         | PMan  | 2.7     |   | Dropping timesharing use of Stanford                                                    |
| Alum Rock Sch     | Educ  | 2.8     | x | Expertise in applications needs are too specific                                        |
| 3COM              | DMan  | 2.8     | x | HP for training                                                                         |
| Alum Rock Sch     | Educ  | 4.2     |   | HP is equip vendor                                                                      |
| Borland           | EDP   | 6.7-8   |   | H/W maint very important component of deal                                              |
| Hewlett Packard   | DMan  |         |   | Let internal people do "fun stuff" - contractors more routine work                      |
| MIPS              | DMan  |         |   | Look for flexible pkgs easy to tailor; No indep for syst prog                           |
| Natl Semi         | DMan  |         | x | Look for pkg first                                                                      |
| Rolm              | DMan  |         |   | Lots of free s/w from IBM; direction is pkg prods; has approved list of vendors         |
| City-San Jose     | StLoc | 2.6     |   | NISSI=financials on Wang; Admins=4GL                                                    |
| Ask               | EDP   | 3.0     |   | Not arms-length; this deal is part of EDS investment in Ask                             |
| 3COM              | DMan  | 2.7     |   | Payroll                                                                                 |
| Alum Rock Sch     | Educ  | 2.7     |   | Payroll                                                                                 |
| Stanford Univ     | Educ  |         |   | Peer consulting form other univs                                                        |
| San Jose State    | Educ  |         |   | Pkg if possible                                                                         |
| St Clara Univ     | Educ  |         |   | Pkg if possible                                                                         |
| Siliconix         | DMan  |         |   | Pkg over custom - most syst are pkg                                                     |
| Precision Monolid | DMan  |         |   | Pkg s/w if 85%+ fit; outside help "when it makes sense"                                 |
| Tymnet - BT       | Tele  |         |   | Pref pkg if possible - vendor does/maintains all mods; consultants selected for indep v |
| Cnty-St Clara Tr  | StLoc | 2.8     | x | Specialists                                                                             |
| Intel             | DMan  |         |   | Use contractors for tech xfer, unique skills, temp rampups - not leadership role        |
| Alum Rock Sch     | Educ  |         |   | Use individuals w/expertise, not specific firms                                         |
| Xerox Engr Syst   | DMan  | 5.8-5.0 |   | Wants one vendor to do all 3                                                            |



**EXTENDED PERCENTAGES - PS**

| \$BUD<br>APPS | \$BUD<br>PROJ | \$BUD<br>SYSP | \$BUD<br>SINS | \$BUD<br>EDUC | \$BUD<br>TOTL | CHCK<br>SUM |
|---------------|---------------|---------------|---------------|---------------|---------------|-------------|
| 1200          | 0             | 432           | 288           | 288           | 192           | 2400        |
| 100           | 0             | 0             | 0             | 275           | 125           | 500         |
| 1227          | 0             | 0             | 0             | 491           | 736           | 2454        |
| 3800          | 0             | 0             | 0             | 200           | 0             | 4000        |
| 225           | 0             | 225           | 0             | 225           | 225           | 900         |
| 680           | 0             | 0             | 43            | 43            | 85            | 850         |
| 372           | 0             | 0             | 0             | 28            | 0             | 400         |
| 420           | 0             | 0             | 0             | 180           | 0             | 600         |
| 1190          | 0             | 0             | 0             | 340           | 170           | 1700        |
| 150           | 0             | 0             | 0             | 1350          | 0             | 1500        |
| 160           | 0             | 160           | 160           | 1120          | 0             | 1600        |
| 225           | 0             | 0             | 0             | 225           | 0             | 450         |
| 0             | 450           | 100           | 0             | 450           | 0             | 1000        |
| 280           | 0             | 0             | 0             | 120           | 0             | 400         |
| 244           | 0             | 0             | 0             | 81            | 0             | 325         |
| 69            | 0             | 0             | 0             | 29            | 0             | 98          |
| 1860          | 310           | 0             | 0             | 620           | 310           | 3100        |
| 0             | 0             | 0             | 0             | 2500          | 0             | 2500        |
| 700           | 0             | 150           | 50            | 100           | 0             | 1000        |
| 0             | 0             | 0             | 0             | 16            | 0             | 16          |
| 2000          | 0             | 0             | 800           | 2000          | 1200          | 6000        |
| 248           | 0             | 47            | 16            | 0             | 0             | 310         |
| 225           | 0             | 158           | 14            | 54            | 0             | 450         |
| 52            | 0             | 0             | 0             | 6             | 0             | 58          |
| 13            | 0             | 0             | 0             | 13            | 0             | 25          |
| 1336          | 0             | 0             | 0             | 167           | 167           | 1670        |
| 0             | 0             | 0             | 0             | 170           | 0             | 170         |
| 0             | 0             | 0             | 0             | 1107          | 0             | 1107        |
| 44            | 0             | 0             | 0             | 11            | 0             | 55          |
| 7             | 0             | 0             | 0             | 0             | 0             | 7           |
| 0             | 0             | 57            | 0             | 3             | 0             | 60          |
| 650           | 50            | 200           | 0             | 100           | 0             | 1000        |
| 0             | 0             | 0             | 0             | 585           | 0             | 585         |
| 0             | 0             | 0             | 0             | 38            | 0             | 38          |
| 68            | 0             | 0             | 4             | 4             | 0             | 76          |
| 130           | 65            | 65            | 65            | 715           | 260           | 1300        |
| 22            | 3             | 0             | 0             | 1             | 0             | 25          |
| 48            | 0             | 0             | 0             | 24            | 0             | 72          |
| 1400          | 0             | 1575          | 350           | 175           | 0             | 3500        |
| 2200          | 0             | 0             | 0             | 550           | 0             | 2750        |
| 30            | 0             | 0             | 0             | 270           | 0             | 300         |
| 21374         | 878           | 3168          | 1788          | 14673         | 3470          | 45351       |
| 47%           | 2%            | 7%            | 4%            | 32%           | 8%            |             |



# NORMALIZED PERCENTAGES - PS

| 4.0b | 4.1b | 4.2b | 4.3b | 4.4b | 4.5b |      |
|------|------|------|------|------|------|------|
| 50   |      | 18   | 12   | 12   | 8    | 100  |
| 20   |      |      |      | 55   | 25   | 100  |
| 50   |      |      |      | 20   | 30   | 100  |
| 95   |      |      |      | 5    |      | 100  |
| 25   | 0    | 25   | 0    | 25   | 25   | 100  |
| 80   |      |      | 5    | 5    | 10   | 100  |
| 93   |      |      |      | 7    |      | 100  |
| 70   |      |      |      | 30   |      | 100  |
| 70   |      |      |      | 20   | 10   | 100  |
| 10   |      |      |      | 90   |      | 100  |
| 10   |      | 10   | 10   | 70   |      | 100  |
| 50   |      |      |      | 50   |      | 100  |
| 0    | 45   | 10   |      | 45   |      | 100  |
| 70   |      |      |      | 30   |      | 100  |
| 75   |      |      |      | 25   |      | 100  |
| 70   |      |      |      | 30   |      | 100  |
| 60   | 10   |      |      | 20   | 10   | 100  |
|      |      |      |      | 100  |      | 100  |
| 70   |      | 15   | 5    | 10   |      | 100  |
|      |      |      |      | 100  |      | 100  |
| 33   |      |      | 13   | 33   | 20   | 100  |
| 80   |      | 15   | 5    |      |      | 100  |
| 50   |      | 35   | 3    | 12   |      | 100  |
| 90   |      |      |      | 10   |      | 100  |
| 50   |      |      |      | 50   |      | 100  |
| 80   |      |      |      | 10   | 10   | 100  |
|      |      |      |      | 100  |      | 100  |
|      |      |      |      | 100  |      | 100  |
| 80   |      |      |      | 20   |      | 100  |
| 100  |      |      |      |      |      | 100  |
|      |      | 95   |      | 5    |      | 100  |
| 65   | 5    | 20   |      | 10   |      | 100  |
|      |      |      |      | 100  |      | 100  |
|      |      |      |      | 100  |      | 100  |
| 90   |      |      | 5    | 5    |      | 100  |
| 10   |      | 5    | 5    | 55   | 20   | 100  |
| 88   | 10   |      |      | 2    |      | 100  |
| 66   |      |      |      | 34   |      | 100  |
| 40   |      | 45   | 10   | 5    |      | 100  |
| 80   |      |      |      | 20   |      | 100  |
| 10   |      |      |      | 90   |      | 100  |
| 1980 | 75   | 293  | 73   | 1510 | 168  | 4100 |
| 48   | 2    | 7    | 2    | 37   | 4    | 100  |



# CALCULATION OF % INCREASE/DECREASE

| SOFT | % PROC | % PROF | % SINT | % SOPS | %  |
|------|--------|--------|--------|--------|----|
| I    | 10     |        |        |        |    |
| I    | 30     |        |        |        |    |
| I    | 30     |        |        |        |    |
| D    | 50     | D      | 50     |        |    |
| D    | 40     | D      | 40     |        |    |
| D    | R      | D      | 20     |        |    |
| I    | 10 R   | D      | 10     |        |    |
| I    | 55     | D      | 50     |        |    |
| I    | 30     | I      | 20 I   | 20     |    |
| I    | 12     | I      | 12     | I      | 12 |
| R    |        | I      | 20 I   | 20     |    |
| I    | 20     | I      | 10     |        |    |
| I    | 10     | I      | 10     |        |    |
| I    | 99 I   | 10 I   | 99     |        |    |
| I    | 20     | I      | 43     |        |    |
| I    | 50     | I      | 50     |        |    |
| I    | 25     | I      | 25     |        |    |
| I    | 20     | I      | 20     |        |    |
| I    | 20     | I      | 20     |        |    |
| I    | I      | I      | I      | I      |    |
| R    |        | I      | 20     |        |    |
| I    | 30 R   | I      | 30     |        |    |
| I    | 90 D   | 75 I   | 45     |        |    |
| I    | 30     | I      | 20     |        |    |
| R    | I      | 35 I   | 99     |        |    |
| I    | 10     | I      | 10     |        |    |
| I    | 15 D   | 30 I   | 10     |        |    |
| D    | 30     | R      |        |        |    |
| I    | 5 R    | R      | R      | R      |    |
| R    | R      | R      |        |        |    |
| R    | I      | 10 R   | R      | R      |    |
| D    | 25     | R      |        |        |    |
| I    | 50     | R      |        |        |    |
| I    | 12     | R      |        |        |    |
| I    | 25 I   | 10 R   | I      |        |    |
| R    |        | R      |        |        |    |
| I    | 15     | R      | D      | 50     |    |

INC = 31%  
DEC = 34%



# CALCULATION OF % INCREASE/DECREASE

| SOFT | % PROC | % PROF | % SINT | % SOPS | %  |
|------|--------|--------|--------|--------|----|
| I    | 12     | R      |        |        |    |
| I    | 15     | R      | D      | 50     |    |
| D    | 25     | R      |        |        |    |
| I    | 10     | I      | 10     |        |    |
| D    | 50     | D      | 50     |        |    |
| I    | 10     | I      | 10     |        |    |
| D    | 40     | D      | 40     |        |    |
| I    | 50     | I      | 50     |        |    |
| I    | 20     | I      | 20     |        |    |
| R    |        | I      | 20 I   | 20     |    |
| I    | 30     |        |        |        |    |
| D    | 30     | R      |        |        |    |
| R    |        | I      | 20     |        |    |
| R    |        | R      |        |        |    |
| I    | 55     | D      | 50     |        |    |
| I    | 50     | R      |        |        |    |
| I    | 20     | I      | 20     |        |    |
| I    | 30     | I      | 20     |        |    |
| I    | 30     | I      | 20 I   | 20     |    |
| I    | 30     |        |        |        |    |
| I    | 10     |        |        |        |    |
| I    | 20     | I      | 43     |        |    |
| I    | 25     | I      | 25     |        |    |
| I    | 12     | I      | 12     | I      | 12 |
| I    | 20     | I      | 10     |        |    |
| I    | 90 D   | 75 I   | 45     |        |    |
| I    | 15 D   | 30 I   | 10     |        |    |
| R    | I      | 10 R   | R      | R      |    |
| I    | 25 I   | 10 R   | I      |        |    |
| I    | 99 I   | 10 I   | 99     |        |    |
| I    | I      | I      | I      | I      |    |
| R    | I      | 35 I   | 99     |        |    |
| I    | 5 R    | R      | R      | R      |    |
| R    | R      | R      |        |        |    |
| I    | 10 R   | D      | 10     |        |    |
| I    | 30 R   | I      | 30     |        |    |
| D    | R      | D      | 20     |        |    |

INC = 13%  
DEC = 53%



# CALCULATION OF % INCREASE/DECREASE

| SOFT | % PROC | % PROF | % SINT | % SOPS | %  |
|------|--------|--------|--------|--------|----|
| D    | 30     | R      |        |        |    |
| D    | 25     | R      |        |        |    |
| D    | 40     | D      | 40     |        |    |
| D    | 50     | D      | 50     |        |    |
| D    |        | D      | 20     |        |    |
| I    | 5 R    | R      |        | R      |    |
| I    | 30     | I      | 20     |        |    |
| I    | 50     | R      |        |        |    |
| I    | 25     | I      | 25     |        |    |
| I    | 30     |        |        |        |    |
| I    | 30     | I      | 20 I   | 20     |    |
| I    | 25 I   | 10 R   | I      |        |    |
| I    | 20     | I      | 43     |        |    |
| I    | 55     | D      | 50     |        |    |
| I    | 10     |        |        |        |    |
| I    | 90 D   | 75 I   | 45     |        |    |
| I    | 50     | I      | 50     |        |    |
| I    | 20     | I      | 10     |        |    |
| I    | 12     | R      |        |        |    |
| I    | 15     | R      |        | D      | 50 |
| I    | 10     | I      | 10     |        |    |
| I    | 10     | I      | 10     |        |    |
| I    | 30     |        |        |        |    |
| I    | 99 I   | 10 I   | 99     |        |    |
| I    | 20     | I      | 20     |        |    |
| I    | 20     | I      | 20     |        |    |
| I    | 15 D   | 30 I   | 10     |        |    |
| I    | I      | I      |        | I      |    |
| I    | 30 R   | I      | 30     |        |    |
| I    | 12     | I      | 12     | I      | 12 |
| I    | 10 R   | D      | 10     |        |    |
| R    | I      | 35 I   | 99     |        |    |
| R    |        | R      |        |        |    |
| R    | R      | R      |        |        |    |
| R    |        | I      | 20     |        |    |
| R    |        | I      | 20 I   | 20     |    |
| R    | I      | 10 R   | R      | R      |    |

INC = 29%  
 DEC = 36%



IBM South Bay Mkt Anal Quest  
Vendor References

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Question  
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NONE

|                              |   |    |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |    |   |   |   |   |   |   |   |   |   |
|------------------------------|---|----|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|----|---|---|---|---|---|---|---|---|---|
| 2.6 LD/Apps - Systems Soft   | 6 | 1  | 5 | 1 | 1 | 1 | 1 | 6 | 1 | 1 | 2 | 3 | 6 | 1 | 2 | 1 | 2 | 6 | 10 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 6 | 1 |
| 2.7 LD/Processing Services   |   | 1  |   |   |   |   |   | 5 |   |   |   |   |   | 1 | 1 | 2 |   |   |    |   |   |   |   |   |   |   |   |   |
| 2.8 LD/Professional Services | 2 | 18 | 5 | 1 |   |   |   | 1 |   |   | 3 |   |   | 1 | 1 | 2 | 1 | 1 | 1  | 1 |   |   |   |   | 1 | 1 |   |   |
| 2.9 LD/Systems Integration   | 1 |    |   |   |   | 1 | 1 |   |   |   |   |   |   | 1 |   |   |   |   | 1  | 1 |   |   |   |   |   | 1 | 1 |   |
| 3.0 LD/Systems Operations    | 1 |    |   |   |   |   |   |   |   |   |   |   |   | 1 | 1 | 1 |   |   |    |   |   |   |   |   |   |   |   |   |
| 4.0 CH/Applications Dev.     | 1 | 5  | 1 |   |   |   |   |   | 1 | 1 | 2 |   |   |   |   | 1 |   |   |    |   |   |   |   |   |   |   |   |   |
| 4.1 CH/Project Management    | 1 |    |   |   |   |   |   |   |   |   | 1 |   |   |   |   |   | 1 | 1 |    |   |   |   |   |   |   |   |   |   |
| 4.2 CH/Systems Programming   | 1 |    |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |    |   |   |   |   |   | 1 | 2 |   |   |
| 4.3 CH/Software Inst.        |   | 4  |   |   |   |   |   |   |   |   | 1 |   |   |   |   |   |   |   |    |   |   |   |   |   |   | 1 |   |   |
| 4.4 CH/Education             | 4 | 4  |   | 2 | 2 |   |   |   | 1 |   | 1 | 3 |   |   | 1 |   |   | 3 | 3  |   |   |   |   |   |   | 1 |   |   |
| 4.5 Executive Consulting     | 1 |    |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |    |   |   |   |   |   |   |   |   |   |
| 5.1 SI Vendor Used           |   |    |   | 1 |   |   |   |   |   |   |   |   |   |   |   |   |   | 1 |    |   |   |   |   |   |   | 1 |   |   |
| 5.8 SI - Apps Choice         |   |    |   |   | 1 | 1 |   |   |   |   | 1 |   |   |   |   |   |   |   | 1  |   |   |   |   |   |   | 1 | 1 |   |
| 5.9 SI - Infra Choice        |   |    |   |   |   | 1 |   |   |   |   |   | 1 |   |   |   |   |   |   |    |   |   |   |   |   |   |   |   |   |
| 6.0 SI - Network Choice      |   |    |   | 1 |   |   |   |   |   |   | 1 | 1 |   |   |   |   |   | 1 | 1  | 1 |   |   |   |   |   |   |   |   |
| 6.2 SO Vendor Used           |   |    |   |   |   |   |   |   |   |   |   | 1 | 1 |   |   |   |   |   |    |   |   |   |   |   |   | 1 |   |   |
| 6.7-B - Outsource Choice     |   |    |   |   |   |   |   |   |   |   | 1 |   | 1 | 1 | 1 |   |   |   |    |   |   |   |   |   |   | 1 |   |   |

TOTAL

7 31 21 1 1 2 1 7 3 1 1 2 4 1 1 5 1 8 1 3 1 1 1 7 3 1 4 16 1 2 3 2 3 1 2 4 2 1 2 1 1 1 2 15 1 25 1 1 1 1 1 1 2 1 1 1 3 3 1 2 6 1

COMPANIES REVERENCED = 91



IBM South Bay Mkt Anal Quest N N N N N O O O P P P P Q R S S S S S S T T T U V V V W W  
Vendor References I o o o y B d r a a e r r A L R h t t u y e l o n e M o o o

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S r r v n S i a n r a i i D I A a a r n p s c u i r A r l r  
S d t e e . n c s a t c m . N . r n a r h | c s t s h f d  
I i h l x . . l o d e e . / . e f t M a c n h o a s o  
. c e l . . . e p o M . . R . d o u i . t i C e n x i f c P  
. a . . . . . h x a W . . L . r s c . l c A . . . s f o e  
. s s . . . . . i . r a . . G . M d . r . o s . . . t . m r  
/ t . . . . . c . w t . . . . e . s . T n E . . . . p f  
. W C . . . . . . . . . . d . . y . e . . . . .

Question

| Question                     | 1 | 2 | 4 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | SUM | MAX |   |
|------------------------------|---|---|---|---|---|---|---|---|---|---|---|---|---|---|-----|-----|---|
| 2.6 LD/Apps - Systems Soft   | 1 |   |   |   |   |   |   |   |   |   |   |   |   |   | 93  | 10  |   |
| 2.7 LD/Processing Services   |   |   | 1 | 1 |   |   | 1 | 1 |   |   |   |   |   |   | 16  | 5   |   |
| 2.8 LD/Professional Services | 1 |   |   |   | 1 | 1 | 2 |   |   | 2 | 1 |   |   |   | 31  | 3   |   |
| 2.9 LD/Systems Integration   |   |   |   |   |   |   |   |   |   |   |   |   |   |   | 7   | 1   |   |
| 3.0 LD/Systems Operations    |   |   |   |   |   |   |   |   |   |   |   |   |   |   | 4   | 1   |   |
| 4.0 CH/Applications Dev.     | 1 | 1 |   | 1 | 1 |   |   |   |   |   |   |   |   |   | 10  | 2   |   |
| 4.1 CH/Project Management    |   |   |   |   | 1 |   |   |   | 1 |   |   |   |   |   | 5   | 1   |   |
| 4.2 CH/Systems Programming   |   |   |   |   |   |   |   |   |   | 1 |   |   |   |   | 4   | 2   |   |
| 4.3 CH/Software Inst.        |   |   |   |   |   |   |   |   |   |   |   |   |   |   | 2   | 1   |   |
| 4.4 CH/Education             |   |   |   |   | 1 |   | 1 |   |   |   | 1 |   |   |   | 20  | 3   |   |
| 4.5 Executive Consulting     | 1 |   |   | 1 |   |   |   |   |   |   |   |   |   |   | 3   | 1   |   |
| 5.1 SI Vendor Used           |   |   | 1 |   |   |   |   |   |   |   |   |   |   |   | 4   | 1   |   |
| 5.8 SI - Apps Choice         |   |   |   |   |   |   |   | 1 |   |   |   |   |   |   | 7   | 1   |   |
| 5.9 SI - Infra Choice        |   |   |   |   |   |   |   |   |   |   |   |   |   |   | 2   | 1   |   |
| 6.0 SI - Network Choice      |   | 1 |   |   |   |   |   |   |   |   |   |   |   |   | 7   | 1   |   |
| 6.2 SO Vendor Used           |   |   |   |   |   |   |   |   |   |   |   |   |   |   | 3   | 1   |   |
| 6.7-8 - Outsource Choice     |   |   |   |   |   |   |   |   |   |   |   |   |   |   | 5   | 1   |   |
| TOTAL                        | 2 | 2 | 1 | 1 | 1 | 6 | 1 | 1 | 3 | 2 | 3 | 1 | 1 | 1 | 1   | 1   | 1 |
|                              |   |   |   |   |   |   |   |   |   |   |   |   |   |   | 221 | 25  |   |











IBM South Bay Mkt Anal Quest

Vendor References

\*\*LOTUS VERSION MACROS\*\*

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| Company          | Ind  | Quest |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |    |   |   |   |   |   |   |   |   |   |
|------------------|------|-------|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|----|---|---|---|---|---|---|---|---|---|
| Syntax           | PMan | 2.6   | x |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |    |   |   |   |   |   |   |   |   |   |
| Teledyne - McCor | PMan | 2.6   | x |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |    |   |   |   |   |   |   |   |   |   |
| Tymnet - BT      | Tele | 2.6   | x |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |    |   |   |   |   |   |   |   |   |   |
| UC St Cruz       | Educ | 2.6   | x |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |    |   |   |   |   |   |   |   |   |   |
| Varian Assoc     | Dman | 2.6   | x |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |    |   |   |   |   |   |   |   |   |   |
| Vintners Intl    | PMan | 2.6   | x |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |    |   |   |   |   |   |   |   |   |   |
| Xerox Engr Syst  | DMan | 2.6   | x |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |    |   |   |   |   |   |   |   |   |   |
| ..TOTAL          |      | 2.6   | 6 | 1 | 5 | 1 | 1 | 1 | 1 | 1 | 6 | 1 | 1 | 2 | 3 | 6 | 1 | 2 | 1 | 2 | 6 | 10 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 6 | 1 |
| ...              |      | 2.6   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |    |   |   |   |   |   |   |   |   |   |
| Alum Rock Sch    | Educ | 2.7   | x |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |    |   |   |   |   |   |   |   |   |   |
| Alza Corp        | PMan | 2.7   | x |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |    |   |   |   |   |   |   |   |   |   |
| Borland          | EDP  | 2.7   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |    |   |   |   |   |   |   |   |   |   |
| El Camino Hosp   | Med  | 2.7   | x |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |    |   |   |   |   |   |   |   |   |   |
| Fujitsu          | DMan | 2.7   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |    |   |   |   |   |   |   |   |   |   |
| San Jose State   | Educ | 2.7   | x |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |    |   |   |   |   |   |   |   |   |   |
| Siliconix        | DMan | 2.7   | x |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |    |   |   |   |   |   |   |   |   |   |
| Spectra Physics  | DMan | 2.7   | x |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |    |   |   |   |   |   |   |   |   |   |
| St Clara Univ    | Educ | 2.7   | x |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |    |   |   |   |   |   |   |   |   |   |
| Stanford Univ    | Educ | 2.7   | x |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |    |   |   |   |   |   |   |   |   |   |
| Teledyne - McCor | PMan | 2.7   | x |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |    |   |   |   |   |   |   |   |   |   |
| Tymnet - BT      | Tele | 2.7   | x |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |    |   |   |   |   |   |   |   |   |   |
| ..TOTAL          |      | 2.7   | 1 | 5 |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |    |   |   |   |   |   |   |   |   |   |
| ...              |      | 2.7   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |    |   |   |   |   |   |   |   |   |   |
| 3COM             | DMan | 2.8   | x |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |    |   |   |   |   |   |   |   |   |   |
| Alum Rock Sch    | Educ | 2.8   | x |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |    |   |   |   |   |   |   |   |   |   |
| Alza Corp        | PMan | 2.8   | x |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |    |   |   |   |   |   |   |   |   |   |
| Ask              | EDP  | 2.8   | x |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |    |   |   |   |   |   |   |   |   |   |
| Borland          | EDP  | 2.8   | x |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |    |   |   |   |   |   |   |   |   |   |



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Northern TelecomDMan 5.1







IBM South Bay Mkt Anal Quest N N N N N O O O P P P P P Q R S S S S S S T T T U V V V W W  
 Vendor References I o o o y B d r a a e r r A L R h t t u u y e l o n e M o o o  
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| Company          | Ind   | Quest | Notes                                                                        |
|------------------|-------|-------|------------------------------------------------------------------------------|
| Alum Rock Sch    | Educ  |       | Use individuals w/expertise, not specific firms                              |
| Alza Corp        | PMan  |       |                                                                              |
| AMD              | DMan  |       | Always look for pkg first; no leading vendors - looking for specific sk      |
| Hewlett Packard  | DMan  |       | Let internal people do "fun stuff" - contractors more routine work           |
| Intel            | DMan  |       | ... Use contractors for tech xfer, unique skills, temp rampups - not leaders |
| MIPS             | DMan  |       | ... Look for flexible pkgs easy to tailor; No indep for syst prog            |
| Monterey Mush    | Other |       | ... 3rd party s/w must not be modified a500                                  |
| Natl Semi        | DMan  |       | ... Look for pkg first                                                       |
| Precision Monoli | DMan  |       | ... Pkg s/w if 85%+ fit; outside help "when it makes sense"                  |
| Rolm             | DMan  |       | ... Lots of free s/w from IBM; direction is pkg prods; has approved list o   |
| San Jose State   | Educ  |       | ... Pkg if possible                                                          |
| Siliconix        | DMan  |       | ... Pkg over custom - most syst are pkg                                      |
| St Clara Univ    | Educ  |       | ... Pkg if possible                                                          |
| Stanford Univ    | Educ  |       | ... Peer consulting form other univs                                         |
| Tymnet - BT      | Tele  |       | ... Pref pkg if possible - vendor does/maintains all mods; consultants sele  |
| UC St Cruz       | Educ  |       | ... Budget constraints                                                       |
| Watkins Johnson  | DMan  |       | ...                                                                          |
| ..TOTAL          |       |       |                                                                              |
| ...              |       |       |                                                                              |
| 3COM             | DMan  | 2.6   | ... Ask for financials/mfg; HP for image DB                                  |
| 3COM             | DMan  | 2.6   | ... Payroll                                                                  |
| Alum Rock Sch    | Educ  | 2.6   | ...                                                                          |
| AMD              | DMan  | 2.6   | ...                                                                          |
| Ask              | EDP   | 2.6   | ...                                                                          |
| Borland          | EDP   | 2.6   | ...                                                                          |
| Chips & Techn    | DMan  | 2.6   | ...                                                                          |
| City-Monterey    | StLoc | 2.6   | ...                                                                          |
| City-San Jose    | StLoc | 2.6   | ... NISSI=financials on Wang; Admins=4GL                                     |







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 .WC.....d..y.e.....

| Company          | Ind  | Quest |   |   |   |   |   |   |   |   |   |   | Notes                                                |
|------------------|------|-------|---|---|---|---|---|---|---|---|---|---|------------------------------------------------------|
| Syntex           | PMan | 2.6   |   |   |   |   |   |   |   |   |   |   | ...                                                  |
| Teledyne - McCor | PMan | 2.6   | x |   |   |   |   |   |   |   |   |   | ...                                                  |
| Tymnet - BT      | Tele | 2.6   | x |   |   |   |   |   |   |   |   |   | ...                                                  |
| UC St Cruz       | Educ | 2.6   |   |   |   |   |   |   |   |   |   |   | ...                                                  |
| Varian Assoc     | Dman | 2.6   |   |   |   |   |   |   |   |   |   |   | ...                                                  |
| Vintners Intl    | PMan | 2.6   |   |   |   |   |   |   |   |   |   |   | ...                                                  |
| Xerox Engr Syst  | DMan | 2.6   | x |   |   |   |   |   |   |   |   |   | ...                                                  |
| ..TOTAL          |      | 2.6   | 1 | 2 | 4 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1                                                    |
| ...              |      | 2.6   |   |   |   |   |   |   |   |   |   |   |                                                      |
| Alum Rock Sch    | Educ | 2.7   |   |   |   |   |   |   |   |   |   |   | ... Payroll                                          |
| Alza Corp        | PMan | 2.7   | x |   |   |   |   |   |   |   |   |   | ... Dropping timesharing use of Stanford             |
| Borland          | EDP  | 2.7   | x |   |   |   |   |   |   |   |   |   | ...                                                  |
| El Camino Hosp   | Med  | 2.7   |   |   |   |   |   |   |   |   |   |   | ...                                                  |
| Fujitsu          | DMan | 2.7   | x |   |   |   |   |   |   |   |   |   | ...                                                  |
| San Jose State   | Educ | 2.7   |   |   |   |   |   |   |   |   |   |   | ...                                                  |
| Siliconix        | DMan | 2.7   |   |   |   |   |   |   |   |   |   |   | ...                                                  |
| Spectra Physics  | DMan | 2.7   |   |   |   |   |   |   |   |   |   |   | ...                                                  |
| St Clara Univ    | Educ | 2.7   |   |   |   |   |   |   |   |   |   |   | ...                                                  |
| Stanford Univ    | Educ | 2.7   | x |   |   |   |   |   |   |   |   |   | ...                                                  |
| Teledyne - McCor | PMan | 2.7   |   |   |   |   |   |   |   |   |   |   | ...                                                  |
| Tymnet - BT      | Tele | 2.7   |   |   |   |   |   |   |   |   |   |   | ...                                                  |
| ..TOTAL          |      | 2.7   | 1 | 1 |   |   | 1 | 1 |   |   |   |   |                                                      |
| ...              |      | 2.7   |   |   |   |   |   |   |   |   |   |   |                                                      |
| 3COM             | DMan | 2.8   |   |   |   |   |   |   |   |   |   |   | ... HP for training                                  |
| Alum Rock Sch    | Educ | 2.8   |   |   |   |   |   |   |   |   |   |   | ... Expertise in applications needs are too specific |
| Alza Corp        | PMan | 2.8   |   |   |   |   |   |   |   |   |   |   | ...                                                  |
| Ask              | EDP  | 2.8   |   |   |   |   |   |   |   |   |   |   | ...                                                  |
| Borland          | EDP  | 2.8   |   |   |   |   |   |   |   |   |   |   | ...                                                  |



IBM South Bay Mkt Anal Quest NNNNNNOOO PPPPPQRRSSSSSSSTTTUUVVVW  
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 30-Apr-91 lihlx..l od ee./eftMaCn hoaso  
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 .WC..... ..d..y.e.....

| Company           | Ind     | Quest | Notes       |
|-------------------|---------|-------|-------------|
| Chips & Techn     | DMan    | 2.8   | x           |
| City-Monterey     | StLoc   | 2.8   | x           |
| City-San Jose     | StLoc   | 2.8   | x           |
| Cnty-St Clara     | TrStLoc | 2.8   | Specialists |
| Comp Assoc        | EDP     | 2.8   |             |
| El Camino Hosp    | Med     | 2.8   |             |
| Fujitsu           | DMan    | 2.8   |             |
| GE Nuclear        | DMan    | 2.8   | x           |
| Hartnell Comm     | CoEduc  | 2.8   |             |
| Lockheed          | DMan    | 2.8   |             |
| MIPS              | DMan    | 2.8   |             |
| Mont Comm Hosp    | Med     | 2.8   |             |
| Monterey Mush     | Other   | 2.8   |             |
| Natl Semi         | DMan    | 2.8   |             |
| Northern Telecom  | DMan    | 2.8   |             |
| Precision Monolid | DMan    | 2.8   |             |
| Raisch            | Other   | 2.8   |             |
| RFI               | Other   | 2.8   |             |
| Rolm              | DMan    | 2.8   |             |
| San Jose Med Ctr  | Medi    | 2.8   |             |
| San Jose State    | Educ    | 2.8   | x           |
| Spectra Physics   | DMan    | 2.8   |             |
| St Clara Univ     | Educ    | 2.8   | x           |
| St Cruz Sch Dist  | Educ    | 2.8   |             |
| Stanford Univ     | Educ    | 2.8   | x           |
| Syntex            | PMan    | 2.8   |             |
| Teledyne - McCor  | PMan    | 2.8   | x           |
| Tymnet - BT       | Tele    | 2.8   |             |



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IBM South Bay Mkt Anal Guest  NNNNNNOO P P P P P Q R S S S S S S T T T U V V V W W
Vendor References              1 0 0 0 y B d r   a a e r r A L R h t t t u y e l o n e M o o o
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 30-Apr-91 Iihlx..l od ee./eftMaCn hoaso  
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 .WC..... ..d..y.e.....

| Company         | Ind   | Quest |   |   |   |   |  |  |  |  |  |  | Notes                  |     |
|-----------------|-------|-------|---|---|---|---|--|--|--|--|--|--|------------------------|-----|
| St Clara Univ   | Educ  | 4.0   |   |   |   |   |  |  |  |  |  |  | ...                    |     |
| Syntex          | PMan  | 4.0   |   |   |   |   |  |  |  |  |  |  | ...                    |     |
| Tymnet - BT     | Tele  | 4.0   |   |   |   |   |  |  |  |  |  |  | ...                    |     |
| Varian Assoc    | Dman  | 4.0   | x |   |   |   |  |  |  |  |  |  |                        | ... |
| Vintners Intl   | PMan  | 4.0   |   |   |   |   |  |  |  |  |  |  | ...                    |     |
| ..TOTAL         |       | 4.0   | 1 | 1 | 1 |   |  |  |  |  |  |  |                        |     |
| ...             |       | 4.0   |   |   |   |   |  |  |  |  |  |  |                        |     |
| Borland         | EDP   | 4.1   |   |   |   |   |  |  |  |  |  |  | ...                    |     |
| City-San Jose   | StLoc | 4.1   |   |   |   |   |  |  |  |  |  |  | x                      |     |
| Watkins Johnson | DMan  | 4.1   |   | x |   |   |  |  |  |  |  |  | ...                    |     |
| ..TOTAL         |       | 4.1   |   | 1 |   | 1 |  |  |  |  |  |  |                        |     |
| ...             |       | 4.1   |   |   |   |   |  |  |  |  |  |  |                        |     |
| Alum Rock Sch   | Educ  | 4.2   |   |   |   |   |  |  |  |  |  |  | ... HP is equip vendor |     |
| GE Nuclear      | DMan  | 4.2   |   |   |   |   |  |  |  |  |  |  | ...                    |     |
| St Clara Univ   | Educ  | 4.2   |   |   |   |   |  |  |  |  |  |  | x                      |     |
| Tymnet - BT     | Tele  | 4.2   |   |   |   |   |  |  |  |  |  |  | ...                    |     |
| Watkins Johnson | DMan  | 4.2   |   |   |   |   |  |  |  |  |  |  | ...                    |     |
| ..TOTAL         |       | 4.2   |   |   |   |   |  |  |  |  |  |  | 1                      |     |
| ...             |       | 4.2   |   |   |   |   |  |  |  |  |  |  |                        |     |
| GE Nuclear      | DMan  | 4.3   |   |   |   |   |  |  |  |  |  |  | ...                    |     |
| MIPS            | DMan  | 4.3   |   |   |   |   |  |  |  |  |  |  | ...                    |     |
| St Clara Univ   | Educ  | 4.3   |   |   |   |   |  |  |  |  |  |  | ...                    |     |
| Tymnet - BT     | Tele  | 4.3   |   |   |   |   |  |  |  |  |  |  | ...                    |     |
| Varian Assoc    | Dman  | 4.3   |   |   |   |   |  |  |  |  |  |  | ...                    |     |
| Vintners Intl   | PMan  | 4.3   |   |   |   |   |  |  |  |  |  |  | ...                    |     |
| ..TOTAL         |       | 4.3   |   |   |   |   |  |  |  |  |  |  |                        |     |
| ...             |       | 4.3   |   |   |   |   |  |  |  |  |  |  |                        |     |
| 3COM            | DMan  | 4.4   |   |   |   |   |  |  |  |  |  |  | ...                    |     |



IBM South Bay Mkt Anal Quest NNNNNNOOO PPPPPORSSSSSSSTTTUUVVWW  
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| Company               | Ind   | Quest | Notes |
|-----------------------|-------|-------|-------|
| Alza Corp             | PMan  | 4.4   | ...   |
| Ask                   | EDP   | 4.4   | ...   |
| Chips & Techn         | DMan  | 4.4   | ...   |
| Comp Assoc            | EDP   | 4.4   | ...   |
| Fujitsu               | DMan  | 4.4   | ...   |
| Lockheed              | DMan  | 4.4   | ...   |
| MIPS                  | DMan  | 4.4   | ...   |
| Mont Comm Hosp        | Med   | 4.4   | ...   |
| Monterey Mush         | Other | 4.4   | ...   |
| Precision Monoli      | DMan  | 4.4   | ...   |
| Siliconix             | DMan  | 4.4   | ...   |
| St Clara Univ         | Educ  | 4.4   | ...   |
| Teledyne - McCor      | PMan  | 4.4   | ...   |
| Tymnet - BT           | Tele  | 4.4   | ...   |
| Varian Assoc          | Dman  | 4.4   | ...   |
| Vintners Intl         | PMan  | 4.4   | ...   |
| Watkins Johnson       | DMan  | 4.4   | ...   |
| ..TOTAL               |       | 4.4   | 1 1 1 |
| ...                   |       | 4.4   |       |
| GE Nuclear            | DMan  | 4.5   | ...   |
| Siliconix             | DMan  | 4.5   | ...   |
| Stanford Univ         | Educ  | 4.5   | ...   |
| Varian Assoc          | Dman  | 4.5   | ...   |
| ..TOTAL               |       | 4.5   | 1 1   |
| ...                   |       | 4.5   |       |
| Cnty-St Clara TrStLoc |       | 5.1   | ...   |
| GE Nuclear            | DMan  | 5.1   | ...   |
| Northern Telecom      | DMan  | 5.1   | ...   |



IBM South Bay Mkt Anal Quest NNNNN000 P P P P P Q R S S S S S S S T T T U V V V W W  
 Vendor References I o o o y B d r a a e r r A L R h t t u u y e l o n e M o o o  
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| Company               | Ind   | Quest | Notes                                          |
|-----------------------|-------|-------|------------------------------------------------|
| ..TOTAL               | 5.1   | 1     |                                                |
| ...                   | 5.1   |       |                                                |
| AMD                   | DMan  | 5.8   | ...                                            |
| Cnty-St Clara TrStLoc | 5.8   |       | ...                                            |
| El Camino Hosp Med    | 5.8   | x     | ...                                            |
| Fujitsu               | DMan  | 5.8   | ...                                            |
| Xerox Engr Syst DMan  | 5.8   |       | ... Wants one vendor to do all 3               |
| ..TOTAL               | 5.8   | 1     |                                                |
| ...                   | 5.8   |       |                                                |
| AMD                   | DMan  | 5.9   | ...                                            |
| Cnty-St Clara TrStLoc | 5.9   |       | ...                                            |
| ..TOTAL               | 5.9   |       |                                                |
| ...                   | 5.9   |       |                                                |
| Cnty-St Clara TrStLoc | 6.0   |       | ...                                            |
| El Camino Hosp Med    | 6.0   |       | ...                                            |
| GE Nuclear            | DMan  | 6.0   | x                                              |
| ..TOTAL               | 6.0   | 1     | ...                                            |
| ...                   | 6.0   |       |                                                |
| Cnty-St Clara TrStLoc | 6.2   |       | ...                                            |
| El Camino Hosp Med    | 6.2   |       | ...                                            |
| Tymnet - BT Tele      | 6.2   |       | ... Disaster recovery                          |
| ..TOTAL               | 6.2   |       |                                                |
| ...                   | 6.2   |       |                                                |
| Cnty-St Clara TrStLoc | 6.7   |       | ...                                            |
| Borland               | EDP   | 6.7-8 | ... H/W maint very important component of deal |
| Watkins Johnson DMan  | 6.7-8 |       | ...                                            |
| ..TOTAL               |       |       |                                                |
| ...                   |       |       |                                                |



IBM South Bay Market Survey  
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--Sort by: INPUT Std Ind Seq

South Bay Market Forecast  
18-Apr-91  
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| County      |                | Industry | No of Firms | -- Employees -- |        | - 1990 SoBay Forecast (\$000)- |        |         | --- INPUT 1990-92 CAGR --- |     |     |     | - 1992 SoBay Forecast (\$000)- |        |        |         |       |
|-------------|----------------|----------|-------------|-----------------|--------|--------------------------------|--------|---------|----------------------------|-----|-----|-----|--------------------------------|--------|--------|---------|-------|
|             |                |          |             | Tot             | Avg    | PFS                            | \$1    | \$0     | Total                      | PFS | \$1 | \$0 | Total                          | PFS    | \$1    | \$0     | Total |
| MONTEREY    | Discr Mfg      | 5        | 436         | 87              | 232    | 44                             | 17     | 293     | 11%                        | 23% | 23% | 13% | 284                            | 67     | 25     | 376     |       |
|             | Proc Mfrgr     | 13       | 2,838       | 218             | 943    | 33                             | 110    | 1,085   | 8%                         | 12% | 10% | 8%  | 1,090                          | 42     | 133    | 1,265   |       |
|             | Trans/Util     | 5        | 231         | 46              | 170    | 98                             | 20     | 288     | 13%                        | 15% | 15% | 14% | 218                            | 131    | 26     | 374     |       |
|             | Wdis/RDis      | 24       | 2,641       | 110             | 596    | 426                            | 189    | 1,211   | 8%                         | 19% | 18% | 13% | 692                            | 606    | 262    | 1,556   |       |
|             | Bank/S&L       | 2        | 1,128       | 564             | 1,984  | 358                            | 1,874  | 4,216   | 7%                         | 22% | 13% | 11% | 2,290                          | 533    | 2,399  | 5,214   |       |
|             | Finan/Insur    | 9        | 257         | 29              | 225    | 31                             | 126    | 382     | 12%                        | 20% | 9%  | 12% | 282                            | 45     | 148    | 475     |       |
|             | Med/Educ       | 21       | 5,546       | 264             | 170    | 129                            | 382    | 681     | 9%                         | 10% | 11% | 11% | 203                            | 157    | 474    | 834     |       |
|             | Svce Industr   | 8        | 1,983       | 248             | 476    | 222                            | 72     | 770     | 10%                        | 23% | 20% | 14% | 571                            | 338    | 103    | 1,009   |       |
|             | EDP Svcs       | 5        | 304         | 61              | 4      | 0                              | 0      | 4       | 12%                        | 28% | 8%  | 14% | 5                              | 1      | 0      | 6       |       |
|             | Fed Govt       | 12       | 15,425      | 1,285           | 503    | 587                            | 299    | 1,390   | 3%                         | 6%  | 6%  | 5%  | 533                            | 658    | 338    | 1,529   |       |
|             | St&Loc Govt    | 7        | 1,579       | 226             | 1,214  | 237                            | 393    | 1,844   | 13%                        | 21% | 18% | 15% | 1,548                          | 345    | 549    | 2,441   |       |
|             | Agr/Min/Constr | 20       | 2,431       | 122             | 347    | 20                             | NA     | 367     | 12%                        | 29% | NA  | 13% | 434                            | 33     | NA     | 466     |       |
|             | -- TOTAL IND   | 131      | 34,799      | 266             | 6,863  | 2,187                          | 3,480  | 12,530  | 9%                         | 16% | 13% | 11% | 8,149                          | 2,955  | 4,458  | 15,545  |       |
| SAN BENITO  | Proc Mfrgr     | 3        | 570         | 190             | 189    | 7                              | 22     | 218     | 8%                         | 12% | 10% | 8%  | 219                            | 8      | 27     | 254     |       |
|             | Wdis/RDis      | 3        | 154         | 51              | 35     | 25                             | 11     | 71      | 8%                         | 19% | 18% | 13% | 40                             | 35     | 15     | 91      |       |
|             | Med/Educ       | 1        | 40          | 40              | 1      | 1                              | 3      | 5       | 9%                         | 10% | 11% | 11% | 1                              | 1      | 3      | 6       |       |
|             | Agr/Min/Constr | 1        | 136         | 136             | 19     | 1                              | NA     | 21      | 12%                        | 29% | NA  | 13% | 24                             | 2      | NA     | 26      |       |
|             | -- TOTAL IND   | 8        | 900         | 113             | 245    | 33                             | 36     | 314     | 8%                         | 18% | 13% | 10% | 285                            | 47     | 45     | 377     |       |
| SANTA CLARA | Discr Mfg      | 329      | 237,632     | 722             | 47,450 | 9,280                          | 3,663  | 60,393  | 11%                        | 23% | 23% | 13% | 58,062                         | 14,058 | 5,547  | 77,509  |       |
|             | Proc Mfrgr     | 53       | 11,397      | 215             | 3,785  | 132                            | 440    | 4,358   | 8%                         | 12% | 10% | 8%  | 4,378                          | 167    | 534    | 5,079   |       |
|             | Trans/Util     | 38       | 8,844       | 233             | 6,500  | 3,762                          | 750    | 11,012  | 13%                        | 15% | 15% | 14% | 8,349                          | 4,996  | 992    | 14,336  |       |
|             | Wdis/RDis      | 125      | 18,573      | 149             | 4,194  | 2,993                          | 1,327  | 8,514   | 8%                         | 19% | 18% | 13% | 4,863                          | 4,260  | 1,846  | 10,942  |       |
|             | Bank/S&L       | 20       | 1,378       | 69              | 2,423  | 437                            | 2,289  | 5,150   | 7%                         | 22% | 13% | 11% | 2,797                          | 652    | 2,930  | 6,370   |       |
|             | Finan/Insur    | 39       | 1,286       | 33              | 1,125  | 156                            | 628    | 1,909   | 12%                        | 20% | 9%  | 12% | 1,411                          | 225    | 742    | 2,376   |       |
|             | Med/Educ       | 146      | 74,066      | 507             | 2,269  | 1,727                          | 5,099  | 9,096   | 9%                         | 10% | 11% | 11% | 2,715                          | 2,093  | 6,332  | 11,139  |       |
|             | Svce Industr   | 47       | 38,244      | 814             | 9,184  | 4,285                          | 1,384  | 14,853  | 10%                        | 23% | 20% | 14% | 11,015                         | 6,522  | 1,980  | 19,457  |       |
|             | EDP Svcs       | 148      | 30,963      | 209             | 372    | 50                             | 17     | 439     | 12%                        | 28% | 8%  | 14% | 465                            | 85     | 20     | 566     |       |
|             | Fed Govt       | 9        | 14,128      | 1,570           | 922    | 1,076                          | 548    | 2,546   | 3%                         | 6%  | 6%  | 5%  | 977                            | 1,205  | 619    | 2,801   |       |
|             | St&Loc Govt    | 20       | 11,872      | 594             | 9,130  | 1,781                          | 2,956  | 13,868  | 13%                        | 21% | 18% | 15% | 11,639                         | 2,596  | 4,131  | 18,353  |       |
|             | Agr/Min/Constr | 35       | 6,478       | 185             | 924    | 53                             | NA     | 978     | 12%                        | 29% | NA  | 13% | 1,155                          | 89     | NA     | 1,243   |       |
|             | -- TOTAL IND   | 1,009    | 454,861     | 451             | 88,279 | 25,733                         | 19,102 | 133,114 | 11%                        | 20% | 16% | 13% | 107,826                        | 36,945 | 25,674 | 170,170 |       |



IBM South Bay Market Survey  
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South Bay Market Forecast  
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| County     | Industry        | No of Firms | -- Employees -- |       | - 1990 PFS | SoBay Forecast (\$000)- |                | --- INPUT 1990-92 CAGR --- |     |     |       | - 1992 SoBay Forecast (\$000)- |        |        |         |
|------------|-----------------|-------------|-----------------|-------|------------|-------------------------|----------------|----------------------------|-----|-----|-------|--------------------------------|--------|--------|---------|
|            |                 |             | Tot             | Avg   |            | SI                      | SO Total       | PFS                        | SI  | SO  | Total | PFS                            | SI     | SO     | Total   |
| SANTA CRUZ | Discr Mfg       | 14          | 8,129           | 581   | 4,329      | 825                     | 313 5,467      | 11%                        | 23% | 23% | 13%   | 5,297                          | 1,250  | 474    | 7,007   |
|            | Proc Mfgr       | 9           | 3,170           | 352   | 1,053      | 37                      | 122 1,212      | 8%                         | 12% | 10% | 8%    | 1,218                          | 47     | 149    | 1,413   |
|            | Trans/Util      | 4           | 143             | 36    | 105        | 61                      | 12 178         | 13%                        | 15% | 15% | 14%   | 135                            | 81     | 16     | 232     |
|            | Wdis/RDis       | 17          | 1,022           | 60    | 231        | 165                     | 73 469         | 8%                         | 19% | 18% | 13%   | 268                            | 234    | 102    | 602     |
|            | Bank/S&L        | 1           | 200             | 200   | 352        | 63                      | 332 747        | 7%                         | 22% | 13% | 11%   | 406                            | 95     | 425    | 925     |
|            | Finan/Insur     | 2           | 110             | 55    | 96         | 13                      | 54 163         | 12%                        | 20% | 9%  | 12%   | 121                            | 19     | 63     | 203     |
|            | Med/Educ        | 11          | 6,749           | 614   | 207        | 157                     | 465 829        | 9%                         | 10% | 11% | 11%   | 247                            | 191    | 577    | 1,015   |
|            | Svce Industr    | 2           | 130             | 65    | 31         | 15                      | 5 50           | 10%                        | 23% | 20% | 14%   | 37                             | 22     | 7      | 66      |
|            | EDP Svcs        | 5           | 1,323           | 265   | 16         | 2                       | 1 19           | 12%                        | 28% | 8%  | 14%   | 20                             | 4      | 1      | 24      |
|            | Fed Govt        | 0           | 0               | 0     | 0          | 0                       | 0 0            | 3%                         | 6%  | 6%  | NA    | 0                              | 0      | 0      | NA      |
|            | St&Loc Govt     | 9           | 2,542           | 448   | 1,955      | 381                     | 633 2,969      | 13%                        | 21% | 18% | 15%   | 2,492                          | 556    | 885    | 3,930   |
|            | Agr/Min/Constr  | 10          | 1,606           | 161   | 229        | 13                      | NA 242         | 12%                        | 29% | NA  | 13%   | 286                            | 22     | NA     | 308     |
|            | -- TOTAL IND    | 84          | 25,124          | 299   | 8,603      | 1,733                   | 2,010 12,346   | 11%                        | 21% | 16% | 13%   | 10,527                         | 2,520  | 2,698  | 15,725  |
| **TOTAL    | Discr Mfg       | 348         | 246,197         | 707   | 52,011     | 10,150                  | 3,993 66,153   | 11%                        | 23% | 23% | 13%   | 63,642                         | 15,375 | 6,047  | 84,892  |
|            | Proc Mfgr       | 78          | 17,975          | 230   | 5,970      | 209                     | 694 6,873      | 8%                         | 12% | 10% | 8%    | 6,904                          | 264    | 843    | 8,010   |
|            | Trans/Util      | 47          | 9,218           | 196   | 6,775      | 3,922                   | 781 11,478     | 13%                        | 15% | 15% | 14%   | 8,702                          | 5,208  | 1,034  | 14,942  |
|            | Wdis/RDis       | 169         | 22,390          | 132   | 5,056      | 3,608                   | 1,600 10,264   | 8%                         | 19% | 18% | 13%   | 5,863                          | 5,135  | 2,225  | 13,190  |
|            | Bank/S&L        | 23          | 2,706           | 118   | 4,758      | 859                     | 4,495 10,113   | 7%                         | 22% | 13% | 11%   | 5,493                          | 1,280  | 5,754  | 12,509  |
|            | Finan/Insur     | 50          | 1,653           | 33    | 1,446      | 201                     | 808 2,454      | 12%                        | 20% | 9%  | 12%   | 1,814                          | 289    | 954    | 3,054   |
|            | Med/Educ        | 179         | 86,401          | 483   | 2,647      | 2,015                   | 5,948 10,610   | 9%                         | 10% | 11% | 11%   | 3,167                          | 2,441  | 7,387  | 12,994  |
|            | Svce Industr    | 57          | 40,357          | 708   | 9,692      | 4,522                   | 1,460 15,674   | 10%                        | 23% | 20% | 14%   | 11,623                         | 6,882  | 2,089  | 20,532  |
|            | EDP Svcs        | 158         | 32,590          | 206   | 391        | 53                      | 18 462         | 12%                        | 28% | 8%  | 14%   | 490                            | 87     | 21     | 596     |
|            | Fed Govt        | 21          | 28,067          | 1,337 | 1,425      | 1,663                   | 848 3,936      | 3%                         | 6%  | 6%  | 5%    | 1,511                          | 1,862  | 958    | 4,330   |
|            | St&Loc Govt     | 36          | 17,479          | 486   | 12,299     | 2,399                   | 3,982 18,681   | 13%                        | 21% | 18% | 15%   | 15,679                         | 3,498  | 5,565  | 24,724  |
|            | Agr/Min/Constr  | 66          | 10,651          | 161   | 1,520      | 88                      | NA 1,607       | 12%                        | 29% | NA  | 13%   | 1,900                          | 146    | NA     | 2,043   |
|            | -- TOTAL IND    | 1,232       | 515,684         | 419   | 103,991    | 29,687                  | 24,628 158,305 | 10%                        | 20% | 16% | 13%   | 126,787                        | 42,467 | 32,876 | 201,816 |
|            | Total, less Fed | 1,211       | 487,617         | 403   | 102,566    | 28,024                  | 23,780 154,369 | 11%                        | 20% | 16% | 13%   | 125,276                        | 40,604 | 31,919 | 197,486 |



IBM South Bay Market Survey  
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South Bay Market Forecast  
18-Apr-91  
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-- Employees -

| County      | Industry       | No of Firms | Total   | Avg   | - 1990 PFS | Fcst \$I | Adj \$O | Factors- Total | -1990-92 CAGR PFS | Adj- \$I | Adj- \$O | - 1990 PFS | SoBay \$I | Forecast \$O | (\$000)- Total |
|-------------|----------------|-------------|---------|-------|------------|----------|---------|----------------|-------------------|----------|----------|------------|-----------|--------------|----------------|
| MONTEREY    | Discr Mfg      | 5           | 436     | 87    | 80%        | 65%      | 50%     | 75%            | 100%              | 100%     | 100%     | 232        | 44        | 17           | 293            |
|             | Proc Mfrgr     | 13          | 2,838   | 218   | 75%        | 33%      | 33%     | 64%            | 65%               | 65%      | 65%      | 943        | 33        | 110          | 1,085          |
|             | Trans/Util     | 5           | 231     | 46    | 90%        | 90%      | 90%     | 90%            | 100%              | 100%     | 100%     | 170        | 98        | 20           | 288            |
|             | WDis/RDis      | 24          | 2,641   | 110   | 85%        | 85%      | 85%     | 85%            | 90%               | 90%      | 90%      | 596        | 426       | 189          | 1,211          |
|             | Bank/S&L       | 2           | 1,128   | 564   | 90%        | 90%      | 90%     | 90%            | 90%               | 90%      | 90%      | 1,984      | 358       | 1,874        | 4,216          |
|             | Finan/Insur    | 9           | 257     | 29    | 80%        | 80%      | 80%     | 80%            | 90%               | 90%      | 90%      | 225        | 31        | 126          | 382            |
|             | Med/Educ       | 21          | 5,546   | 264   | 75%        | 60%      | 60%     | 63%            | 80%               | 80%      | 80%      | 170        | 129       | 382          | 681            |
|             | Svce Industr   | 8           | 1,983   | 248   | 100%       | 100%     | 100%    | 100%           | 100%              | 100%     | 100%     | 476        | 222       | 72           | 770            |
|             | EDP Svcs       | 5           | 304     | 61    | 100%       | 100%     | 100%    | 100%           | 100%              | 100%     | 100%     | 4          | 0         | 0            | 4              |
|             | Fed Govt       | 12          | 15,425  | 1,285 | 5%         | 5%       | 5%      | 5%             | 75%               | 50%      | 50%      | 503        | 587       | 299          | 1,390          |
|             | St&Loc Govt    | 7           | 1,579   | 226   | 75%        | 60%      | 60%     | 69%            | 90%               | 90%      | 90%      | 1,214      | 237       | 393          | 1,844          |
|             | Agr/Min/Constr | 20          | 2,431   | 122   | 100%       | 100%     | NA      | 100%           | 100%              | 100%     | NA       | 347        | 20        | NA           | 367            |
|             | -- TOTAL IND   | 131         | 34,799  | 266   | 39%        | 16%      | 34%     | 30%            |                   |          |          | 6,863      | 2,187     | 3,480        | 12,530         |
| SAN BENITO  | Proc Mfrgr     | 3           | 570     | 190   | 75%        | 33%      | 33%     | 64%            | 65%               | 65%      | 65%      | 189        | 7         | 22           | 218            |
|             | WDis/RDis      | 3           | 154     | 51    | 85%        | 85%      | 85%     | 85%            | 90%               | 90%      | 90%      | 35         | 25        | 11           | 71             |
|             | Med/Educ       | 1           | 40      | 40    | 75%        | 60%      | 60%     | 63%            | 80%               | 80%      | 80%      | 1          | 1         | 3            | 5              |
|             | Agr/Min/Constr | 1           | 136     | 136   | 100%       | 100%     | NA      | NA             | 100%              | 100%     | NA       | 19         | 1         | NA           | 21             |
|             | -- TOTAL IND   | 8           | 900     | 113   | 78%        | 64%      | 42%     | 70%            |                   |          |          | 245        | 33        | 36           | 314            |
| SANTA CLARA | Discr Mfg      | 329         | 237,632 | 722   | 30%        | 25%      | 20%     | 28%            | 100%              | 100%     | 100%     | 47,450     | 9,280     | 3,663        | 60,393         |
|             | Proc Mfrgr     | 53          | 11,397  | 215   | 75%        | 33%      | 33%     | 64%            | 65%               | 65%      | 65%      | 3,785      | 132       | 440          | 4,358          |
|             | Trans/Util     | 38          | 8,844   | 233   | 90%        | 90%      | 90%     | 90%            | 100%              | 100%     | 100%     | 6,500      | 3,762     | 750          | 11,012         |
|             | WDis/RDis      | 125         | 18,573  | 149   | 85%        | 85%      | 85%     | 85%            | 90%               | 90%      | 90%      | 4,194      | 2,993     | 1,327        | 8,514          |
|             | Bank/S&L       | 20          | 1,378   | 69    | 90%        | 90%      | 90%     | 90%            | 90%               | 90%      | 90%      | 2,423      | 437       | 2,289        | 5,150          |
|             | Finan/Insur    | 39          | 1,286   | 33    | 80%        | 80%      | 80%     | 80%            | 90%               | 90%      | 90%      | 1,125      | 156       | 628          | 1,909          |
|             | Med/Educ       | 146         | 74,066  | 507   | 75%        | 60%      | 60%     | 63%            | 80%               | 80%      | 80%      | 2,269      | 1,727     | 5,099        | 9,096          |
|             | Svce Industr   | 47          | 38,244  | 814   | 100%       | 100%     | 100%    | 100%           | 100%              | 100%     | 100%     | 9,184      | 4,285     | 1,384        | 14,853         |
|             | EDP Svcs       | 148         | 30,963  | 209   | 100%       | 100%     | 100%    | 100%           | 100%              | 100%     | 100%     | 372        | 50        | 17           | 439            |
|             | Fed Govt       | 9           | 14,128  | 1,570 | 10%        | 10%      | 10%     | 10%            | 75%               | 50%      | 50%      | 922        | 1,076     | 548          | 2,546          |
|             | St&Loc Govt    | 20          | 11,872  | 594   | 75%        | 60%      | 60%     | 69%            | 90%               | 90%      | 90%      | 9,130      | 1,781     | 2,956        | 13,868         |
|             | Agr/Min/Constr | 35          | 6,478   | 185   | 100%       | 100%     | NA      | 100%           | 100%              | 100%     | NA       | 924        | 53        | NA           | 978            |
|             | -- TOTAL IND   | 1,009       | 454,861 | 451   | 41%        | 38%      | 42%     | 41%            |                   |          |          | 88,279     | 25,733    | 19,102       | 133,114        |



IBM South Bay Market Survey  
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 --Sort by: INPUT Std Ind Seq

South Bay Market Forecast  
 18-Apr-91  
 01:46 PM

| County                | Industry       | No of Firms | -- Employees -<br>Tot Avg | - 1990<br>PFS | SI   | Adj SO | Factors-<br>Total | -1990-92<br>PFS | SI   | CAGR<br>SO | - 1990<br>PFS | SoBay<br>SI | Forecast<br>SO | (\$000)-<br>Total |
|-----------------------|----------------|-------------|---------------------------|---------------|------|--------|-------------------|-----------------|------|------------|---------------|-------------|----------------|-------------------|
| SANTA CRUZ            | Discr Mfg      | 14          | 8,129 581                 | 80%           | 65%  | 50%    | 75%               | 100%            | 100% | 100%       | 4,329         | 825         | 313            | 5,467             |
|                       | Proc Mfrg      | 9           | 3,170 352                 | 75%           | 33%  | 33%    | 64%               | 65%             | 65%  | 65%        | 1,053         | 37          | 122            | 1,212             |
|                       | Trans/Util     | 4           | 143 36                    | 90%           | 90%  | 90%    | 90%               | 100%            | 100% | 100%       | 105           | 61          | 12             | 178               |
|                       | WDis/RDis      | 17          | 1,022 60                  | 85%           | 85%  | 85%    | 85%               | 90%             | 90%  | 90%        | 231           | 165         | 73             | 469               |
|                       | Bank/S&L       | 1           | 200 200                   | 90%           | 90%  | 90%    | 90%               | 90%             | 90%  | 90%        | 352           | 63          | 332            | 747               |
|                       | Finan/Insur    | 2           | 110 55                    | 80%           | 80%  | 80%    | 80%               | 90%             | 90%  | 90%        | 96            | 13          | 54             | 163               |
|                       | Med/Educ       | 11          | 6,749 614                 | 75%           | 60%  | 60%    | 63%               | 80%             | 80%  | 80%        | 207           | 157         | 465            | 829               |
|                       | Svce Industr   | 2           | 130 65                    | 100%          | 100% | 100%   | 100%              | 100%            | 100% | 100%       | 31            | 15          | 5              | 50                |
|                       | EDP Svcs       | 5           | 1,323 265                 | 100%          | 100% | 100%   | 100%              | 100%            | 100% | 100%       | 16            | 2           | 1              | 19                |
|                       | Fed Govt       | 0           | 0 0                       | 75%           | 60%  | 60%    | NA                | 75%             | 50%  | 50%        | 0             | 0           | 0              | 0                 |
|                       | St&Loc Govt    | 9           | 2,542 448                 | 75%           | 60%  | 60%    | 69%               | 90%             | 90%  | 90%        | 1,955         | 381         | 633            | 2,969             |
|                       | Agr/Min/Constr | 10          | 1,606 161                 | 100%          | 100% | NA     | 100%              | 100%            | 100% | NA         | 229           | 13          | NA             | 242               |
|                       | -- TOTAL IND   | 84          | 25,124 299                | 79%           | 65%  | 60%    | 73%               |                 |      |            | 8,603         | 1,733       | 2,010          | 12,346            |
|                       |                |             |                           |               |      |        |                   |                 |      |            |               |             |                |                   |
| **TOTAL               | Discr Mfg      | 348         | 246,197 707               | 32%           | 26%  | 21%    | 30%               | 100%            | 100% | 100%       | 52,011        | 10,150      | 3,993          | 66,153            |
|                       | Proc Mfrg      | 78          | 17,975 230                | 75%           | 33%  | 33%    | 64%               | 65%             | 65%  | 65%        | 5,970         | 209         | 694            | 6,873             |
|                       | Trans/Util     | 47          | 9,218 196                 | 90%           | 90%  | 90%    | 90%               | 100%            | 100% | 100%       | 6,775         | 3,922       | 781            | 11,478            |
|                       | WDis/RDis      | 169         | 22,390 132                | 85%           | 85%  | 85%    | 85%               | 90%             | 90%  | 90%        | 5,056         | 3,608       | 1,600          | 10,264            |
|                       | Bank/S&L       | 23          | 2,706 118                 | 90%           | 90%  | 90%    | 90%               | 90%             | 90%  | 90%        | 4,758         | 859         | 4,495          | 10,113            |
|                       | Finan/Insur    | 50          | 1,653 33                  | 80%           | 80%  | 80%    | 80%               | 90%             | 90%  | 90%        | 1,446         | 201         | 808            | 2,454             |
|                       | Med/Educ       | 179         | 86,401 483                | 75%           | 60%  | 60%    | 63%               | 80%             | 80%  | 80%        | 2,647         | 2,015       | 5,948          | 10,610            |
|                       | Svce Industr   | 57          | 40,357 708                | 100%          | 100% | 100%   | 100%              | 100%            | 100% | 100%       | 9,692         | 4,522       | 1,460          | 15,674            |
|                       | EDP Svcs       | 158         | 32,590 206                | 100%          | 100% | 100%   | 100%              | 100%            | 100% | 100%       | 391           | 53          | 18             | 462               |
|                       | Fed Govt       | 21          | 28,067 1,337              | 8%            | 8%   | 8%     | 8%                | 75%             | 50%  | 50%        | 1,425         | 1,663       | 848            | 3,936             |
|                       | St&Loc Govt    | 36          | 17,479 486                | 69%           | 55%  | 55%    | 63%               | 90%             | 90%  | 90%        | 12,299        | 2,399       | 3,982          | 18,681            |
|                       | Agr/Min/Constr | 66          | 10,651 161                | 100%          | 100% | NA     | 100%              | 100%            | 100% | NA         | 1,520         | 88          | NA             | 1,607             |
|                       | -- TOTAL IND   | 1,232       | 515,684 419               | 43%           | 36%  | 41%    | 41%               |                 |      |            | 103,991       | 29,687      | 24,628         | 158,305           |
|                       |                |             |                           |               |      |        |                   |                 |      |            |               |             |                |                   |
| Total, less Fed 1,211 |                |             | 487,617 403               |               |      |        |                   |                 |      |            | 102,566       | 28,024      | 23,780         | 154,369           |



COMPUTER INTELLIGENCE  
SPECIAL REPORT FOR IBM

DATE: 03/13/91 PRG: IBM CNTYRPT CB

| COUNTY NAME | INDUSTRY GROUP   | TOT EMP | AVG EMP | TOT REV | AVG REV | TOT MIPS | AVG MIPS |
|-------------|------------------|---------|---------|---------|---------|----------|----------|
| MONTEREY    | AGRI/MINING/CONS | 2,431   | 122     | 681     | 34      | 13.5     | .7       |
|             | BANK/SAVINGS LOA | 1,128   | 564     | 840     | 420     | 42.0     | 21.0     |
|             | BUSINESS-SERVICE | 1,983   | 248     | 88      | 11      | 2.7      | .3       |
|             | DISCRETE-MFG     | 436     | 87      | 45      | 9       | 4.3      | .9       |
|             | EDP-SERVICES     | 304     | 61      | 14      | 3       | 23.2     | 4.6      |
|             | FINANCE/INSURANC | 257     | 29      | 190     | 21      | 3.6      | .4       |
|             | GOVERNMENT       | 31,704  | 1,378   | 6,067   | 264     | 695.4    | 30.2     |
|             | MEDICAL/EDUCATIO | 5,546   | 264     | 244     | 12      | 59.0     | 2.8      |
|             | PROCESS-MFG      | 2,838   | 218     | 294     | 23      | 35.9     | 2.8      |
|             | TRANS/UTILITIES  | 231     | 46      | 100     | 20      | .9       | .2       |
|             | WHOLESALE/RETAIL | 2,641   | 110     | 893     | 37      | 34.4     | 1.4      |
| SAN BENITO  | AGRI/MINING/CONS | 136     | 136     | 38      | 38      | .0       | .0       |
|             | MEDICAL/EDUCATIO | 40      | 40      | 2       | 2       | .0       | .0       |
|             | PROCESS-MFG      | 570     | 190     | 58      | 19      | 4.3      | 1.4      |
|             | WHOLESALE/RETAIL | 154     | 51      | 11      | 4       | .2       | .1       |
| SANTA CLARA | AGRI/MINING/CONS | 6,478   | 185     | 960     | 27      | 8.5      | .2       |
|             | BANK/SAVINGS LOA | 1,378   | 69      | 1,025   | 51      | 47.1     | 2.4      |
|             | BUSINESS-SERVICE | 68,244  | 1,422   | 2,943   | 61      | 147.6    | 3.1      |
|             | DISCRETE-MFG     | 550,480 | 1,422   | 54,787  | 142     | 30,282.7 | 78.2     |
|             | EDP-SERVICES     | 31,833  | 208     | 1,829   | 12      | 17,466.7 | 114.2    |
|             | FINANCE/INSURANC | 1,286   | 33      | 954     | 24      | 25.7     | .7       |
|             | GOVERNMENT       | 129,550 | 2,591   | 23,179  | 464     | 3,019.9  | 60.4     |
|             | MEDICAL/EDUCATIO | 182,736 | 1,107   | 10,587  | 64      | 4,919.0  | 29.8     |
|             | PROCESS-MFG      | 12,197  | 226     | 1,254   | 23      | 211.5    | 3.9      |
|             | TRANS/UTILITIES  | 8,844   | 233     | 3,408   | 34      | 259.1    | 6.8      |
|             | WHOLESALE/RETAIL | 18,633  | 148     | 4,317   | 34      | 824.3    | 6.5      |
| SANTA CRUZ  | AGRI/MINING/CONS | 1,606   | 161     | 416     | 42      | 7.4      | .7       |
|             | BANK/SAVINGS LOA | 200     | 200     | 149     | 149     | 4.7      | .4       |
|             | BUSINESS-SERVICE | 130     | 65      | 5       | 3       | .0       | .0       |
|             | DISCRETE-MFG     | 8,729   | 513     | 901     | 53      | 190.1    | 11.2     |
|             | EDP-SERVICES     | 1,323   | 265     | 58      | 12      | 23.4     | 4.7      |
|             | FINANCE/INSURANC | 110     | 55      | 82      | 41      | .0       | .0       |
|             | GOVERNMENT       | 2,542   | 282     | 154     | 17      | 39.8     | 4.4      |
|             | MEDICAL/EDUCATIO | 6,749   | 614     | 315     | 29      | 84.3     | 7.7      |
|             | PROCESS-MFG      | 4,170   | 379     | 427     | 39      | 8.3      | .8       |
|             | TRANS/UTILITIES  | 143     | 36      | 62      | 16      | 28.8     | 7.2      |
|             | WHOLESALE/RETAIL | 1,022   | 60      | 172     | 10      | 7.6      | .4       |



04/16/91

14:05

CLIENT SERVICES

004

PAGE 1

Statistical Projections for 112962 establishments as of 04/16/91  
 Sequenced by: INDUST GROUP  
 Domain: 112962 establishments of 112962  
 Country: USA

| INDUST<br>GROUP | NUMBER<br>ESTABS<br>IN C.I. | NUMBER<br>ESTABS<br>PROJECTED | NUMBER<br>EMPLOYEE<br>IN C.I. | NUMBER<br>EMPLOYEE<br>PROJECTED |
|-----------------|-----------------------------|-------------------------------|-------------------------------|---------------------------------|
| AGR-CN          | 6,004                       | 753,680                       | 728,919                       | 6,938,722                       |
| BNK-SL          | 4,781                       | 96,557                        | 1,046,129                     | 2,672,180                       |
| BUS-SV          | 6,218                       | 817,734                       | 1,151,170                     | 9,448,313                       |
| DISTR           | 16,905                      | 2,120,512                     | 2,009,936                     | 26,003,006                      |
| EDP-SV          | 5,413                       | 22,554                        | 629,047                       | 859,563                         |
| FIN-IN          | 6,586                       | 398,690                       | 1,311,712                     | 4,104,919                       |
| GOVT            | 11,095                      | 113,491                       | 5,577,293                     | 9,626,737                       |
| MED-ED          | 16,403                      | 1,305,689                     | 8,078,754                     | 26,723,927                      |
| MFG-DS          | 16,295                      | 148,685                       | 6,254,541                     | 9,616,721                       |
| MFG-PR          | 16,102                      | 188,867                       | 4,464,131                     | 9,154,971                       |
| TRNS-U          | 7,160                       | 320,772                       | 1,709,378                     | 7,222,043                       |
| Fed             | 4,290                       | 24,779                        | 3,273,784                     | 5,440,886                       |
| 56              | 3,794                       | 92,714                        | 1,337,078                     | 4,624,811                       |
| TOTAL           | 112,962                     | 6,287,230                     | 32,961,010                    | 112,371,103                     |

3,872,815  
 5,653,922

Margin of error = .29% at the 95% confidence level based on sampling  
 variation and when applied to percent distributions  
 The margin of error will be wider for subsets of the database  
 Minimum and maximum establishment cell weights, resp., are 1.00 and 8,692.65

Fed/S&L breakout per Lila w/Lon Klein  
 on 4/17/91.



IBM South Bay Market Survey  
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-->Sort by: CI Orig Data Seq

Computer Intelligence Database Tabulation  
25-Mar-91 09:59 AM

| County      | Industry        | No of<br>Firms | -- Employees -- |        | -- Revenues -- |       | ---- MIPS ---- |       |
|-------------|-----------------|----------------|-----------------|--------|----------------|-------|----------------|-------|
|             |                 |                | Tot             | Avg    | Tot            | Avg   | Tot            | Avg   |
| MONTEREY    | Agr/Min/Constr  | 20             | 2,431           | 122    | 681            | 34    | 13.5           | 0.7   |
|             | Bank/S&L        | 2              | 1,128           | 564    | 840            | 420   | 42.0           | 21.0  |
|             | Svce Industr    | 8              | 1,983           | 248    | 88             | 11    | 2.7            | 0.3   |
|             | Discr Mfg       | 5              | 436             | 87     | 45             | 9     | 4.3            | 0.9   |
|             | EDP Svcs        | 5              | 304             | 61     | 14             | 3     | 23.2           | 4.6   |
|             | Finan/Insur     | 9              | 257             | 29     | 190            | 21    | 3.6            | 0.4   |
|             | Govt (incl Fed) | 23             | 31,704          | 1,378  | 6,067          | 264   | 695.4          | 30.2  |
|             | Med/Educ        | 21             | 5,546           | 264    | 244            | 12    | 59.0           | 2.8   |
|             | Proc Mfgr       | 13             | 2,838           | 218    | 294            | 23    | 35.9           | 2.8   |
|             | Trans/Util      | 5              | 231             | 46     | 100            | 20    | 0.9            | 0.2   |
|             | WDis/RDis       | 24             | 2,641           | 110    | 893            | 37    | 34.4           | 1.4   |
|             | -- TOTAL IND    | 135            | 49,499          | 3,127  | 9,456          | 854   | 915            | 65    |
| SAN BENITO  | Agr/Min/Constr  | 1              | 136             | 136    | 38             | 38    | 0.0            | 0.0   |
|             | Med/Educ        | 1              | 40              | 40     | 2              | 2     | 0.0            | 0.0   |
|             | Proc Mfgr       | 3              | 570             | 190    | 58             | 19    | 4.3            | 1.4   |
|             | WDis/RDis       | 3              | 154             | 51     | 11             | 4     | 0.2            | 0.1   |
|             | -- TOTAL IND    | 8              | 900             | 417    | 109            | 63    | 5              | 2     |
| SANTA CLARA | Agr/Min/Constr  | 35             | 6,478           | 185    | 960            | 27    | 8.5            | 0.2   |
|             | Bank/S&L        | 20             | 1,378           | 69     | 1,025          | 51    | 47.1           | 2.4   |
|             | Svce Industr    | 48             | 68,244          | 1,422  | 2,943          | 61    | 147.6          | 3.1   |
|             | Discr Mfg       | 387            | 550,480         | 1,422  | 54,787         | 142   | 30,282.7       | 78.2  |
|             | EDP Svcs        | 153            | 31,833          | 208    | 1,829          | 12    | 17,466.7       | 114.2 |
|             | Finan/Insur     | 39             | 1,286           | 33     | 954            | 24    | 25.7           | 0.7   |
|             | Govt (incl Fed) | 50             | 129,550         | 2,591  | 23,179         | 464   | 3,019.9        | 60.4  |
|             | Med/Educ        | 165            | 182,736         | 1,107  | 10,587         | 64    | 4,919.0        | 29.8  |
|             | Proc Mfgr       | 54             | 12,197          | 226    | 1,254          | 34    | 211.5          | 3.9   |
|             | Trans/Util      | 38             | 8,844           | 233    | 3,409          | 90    | 259.1          | 6.8   |
|             | WDis/RDis       | 126            | 18,633          | 148    | 4,317          | 34    | 824.3          | 6.5   |
|             | -- TOTAL IND    | 1,115          | 1,011,659       | 7,644  | 105,244        | 1,003 | 57,212         | 306   |
| SANTA CRUZ  | Agr/Min/Constr  | 10             | 1,606           | 161    | 416            | 42    | 7.4            | 0.7   |
|             | Bank/S&L        | 1              | 200             | 200    | 149            | 149   | 4.7            | 4.7   |
|             | Svce Industr    | 2              | 130             | 65     | 5              | 3     | 0.0            | 0.0   |
|             | Discr Mfg       | 17             | 8,729           | 513    | 901            | 53    | 190.1          | 11.2  |
|             | EDP Svcs        | 5              | 1,323           | 265    | 58             | 12    | 23.4           | 4.7   |
|             | Finan/Insur     | 2              | 110             | 55     | 82             | 41    | 0.0            | 0.0   |
|             | Govt (incl Fed) | 9              | 2,542           | 282    | 154            | 17    | 39.8           | 4.4   |
|             | Med/Educ        | 11             | 6,749           | 614    | 315            | 29    | 84.3           | 7.7   |
|             | Proc Mfgr       | 11             | 4,170           | 379    | 427            | 39    | 8.3            | 0.8   |
|             | Trans/Util      | 4              | 143             | 36     | 62             | 16    | 28.8           | 7.2   |
|             | WDis/RDis       | 17             | 1,022           | 60     | 172            | 10    | 7.6            | 0.4   |
|             | -- TOTAL IND    | 89             | 26,724          | 2,630  | 2,741          | 411   | 394            | 42    |
| **TOTAL     | Agr/Min/Constr  | 65             | 10,515          | 467    | 2,057          | 103   | 29             | 2     |
|             | Bank/S&L        | 23             | 2,706           | 833    | 2,014          | 620   | 94             | 28    |
|             | Svce Industr    | 58             | 70,357          | 1,735  | 3,036          | 75    | 150            | 3     |
|             | Discr Mfg       | 409            | 559,645         | 2,023  | 55,733         | 204   | 30,477         | 90    |
|             | EDP Svcs        | 163            | 33,460          | 533    | 1,901          | 27    | 17,513         | 124   |
|             | Finan/Insur     | 50             | 1,653           | 117    | 1,226          | 86    | 29             | 1     |
|             | Govt (incl Fed) | 82             | 163,796         | 4,252  | 29,400         | 745   | 3,755          | 95    |
|             | Med/Educ        | 198            | 195,071         | 2,025  | 11,148         | 107   | 5,062          | 40    |
|             | Proc Mfgr       | 81             | 19,775          | 1,013  | 2,033          | 115   | 260            | 9     |
|             | Trans/Util      | 47             | 9,218           | 315    | 3,571          | 126   | 289            | 14    |
|             | WDis/RDis       | 170            | 22,450          | 369    | 5,393          | 85    | 867            | 8     |
|             | -- TOTAL IND    | 1,346          | 1,088,646       | 13,682 | 117,512        | 2,293 | 58,526         | 415   |



IBM South Bay Market Survey  
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--Sort by: INPUT Std Ind Seq

Computer Intelligence Database Tabulation  
25-Mar-91 09:59 AM

| County      | Industry        | No of Firms | -- Employees -- |        | -- Revenues -- |       | ---- MIPS ---- |       |
|-------------|-----------------|-------------|-----------------|--------|----------------|-------|----------------|-------|
|             |                 |             | Tot             | Avg    | Tot            | Avg   | Tot            | Avg   |
| MONTEREY    | Discr Mfg       | 5           | 436             | 87     | 45             | 9     | 4.3            | 0.9   |
|             | Proc Mfg        | 13          | 2,838           | 218    | 294            | 23    | 35.9           | 2.8   |
|             | Trans/Util      | 5           | 231             | 46     | 100            | 20    | 0.9            | 0.2   |
|             | WDis/RDis       | 24          | 2,641           | 110    | 893            | 37    | 34.4           | 1.4   |
|             | Bank/S&L        | 2           | 1,128           | 564    | 840            | 420   | 42.0           | 21.0  |
|             | Finan/Insur     | 9           | 257             | 29     | 190            | 21    | 3.6            | 0.4   |
|             | Med/Educ        | 21          | 5,546           | 264    | 244            | 12    | 59.0           | 2.8   |
|             | Svce Industr    | 8           | 1,983           | 248    | 88             | 11    | 2.7            | 0.3   |
|             | EOP Svcs        | 5           | 304             | 61     | 14             | 3     | 23.2           | 4.6   |
|             | Govt (incl Fed) | 23          | 31,704          | 1,378  | 6,067          | 264   | 695.4          | 30.2  |
|             | Agr/Min/Constr  | 20          | 2,431           | 122    | 681            | 34    | 13.5           | 0.7   |
|             | -- TOTAL IND    | 135         | 49,499          | 3,127  | 9,456          | 854   | 915            | 65    |
| SAN BENITO  | Proc Mfg        | 3           | 570             | 190    | 58             | 19    | 4.3            | 1.4   |
|             | WDis/RDis       | 3           | 154             | 51     | 11             | 4     | 0.2            | 0.1   |
|             | Med/Educ        | 1           | 40              | 40     | 2              | 2     | 0.0            | 0.0   |
|             | Agr/Min/Constr  | 1           | 136             | 136    | 38             | 38    | 0.0            | 0.0   |
|             | -- TOTAL IND    | 8           | 900             | 417    | 109            | 63    | 5              | 2     |
| SANTA CLARA | Discr Mfg       | 387         | 550,480         | 1,422  | 54,787         | 142   | 30,282.7       | 78.2  |
|             | Proc Mfg        | 54          | 12,197          | 226    | 1,254          | 34    | 211.5          | 3.9   |
|             | Trans/Util      | 38          | 8,844           | 233    | 3,409          | 90    | 259.1          | 6.8   |
|             | WDis/RDis       | 126         | 18,633          | 148    | 4,317          | 34    | 824.3          | 6.5   |
|             | Bank/S&L        | 20          | 1,378           | 69     | 1,025          | 51    | 47.1           | 2.4   |
|             | Finan/Insur     | 39          | 1,286           | 33     | 954            | 24    | 25.7           | 0.7   |
|             | Med/Educ        | 165         | 182,736         | 1,107  | 10,587         | 64    | 4,919.0        | 29.8  |
|             | Svce Industr    | 48          | 68,244          | 1,422  | 2,943          | 61    | 147.6          | 3.1   |
|             | EOP Svcs        | 153         | 31,833          | 208    | 1,829          | 12    | 17,466.7       | 114.2 |
|             | Govt (incl Fed) | 50          | 129,550         | 2,591  | 23,179         | 464   | 3,019.9        | 60.4  |
|             | Agr/Min/Constr  | 35          | 6,478           | 185    | 960            | 27    | 8.5            | 0.2   |
|             | -- TOTAL IND    | 1,115       | 1,011,659       | 7,644  | 105,244        | 1,003 | 57,212         | 306   |
| SANTA CRUZ  | Discr Mfg       | 17          | 8,729           | 513    | 901            | 53    | 190.1          | 11.2  |
|             | Proc Mfg        | 11          | 4,170           | 379    | 427            | 39    | 8.3            | 0.8   |
|             | Trans/Util      | 4           | 143             | 36     | 62             | 16    | 28.8           | 7.2   |
|             | WDis/RDis       | 17          | 1,022           | 60     | 172            | 10    | 7.6            | 0.4   |
|             | Bank/S&L        | 1           | 200             | 200    | 149            | 149   | 4.7            | 4.7   |
|             | Finan/Insur     | 2           | 110             | 55     | 82             | 41    | 0.0            | 0.0   |
|             | Med/Educ        | 11          | 6,749           | 614    | 315            | 29    | 84.3           | 7.7   |
|             | Svce Industr    | 2           | 130             | 65     | 5              | 3     | 0.0            | 0.0   |
|             | EOP Svcs        | 5           | 1,323           | 265    | 58             | 12    | 23.4           | 4.7   |
|             | Govt (incl Fed) | 9           | 2,542           | 282    | 154            | 17    | 39.8           | 4.4   |
|             | Agr/Min/Constr  | 10          | 1,606           | 161    | 416            | 42    | 7.4            | 0.7   |
|             | -- TOTAL IND    | 89          | 26,724          | 2,630  | 2,741          | 411   | 394            | 42    |
| **TOTAL     | Discr Mfg       | 409         | 559,645         | 2,023  | 55,733         | 204   | 30,477         | 90    |
|             | Proc Mfg        | 81          | 19,775          | 1,013  | 2,033          | 115   | 260            | 9     |
|             | Trans/Util      | 47          | 9,218           | 315    | 3,571          | 126   | 289            | 14    |
|             | WDis/RDis       | 170         | 22,450          | 369    | 5,393          | 85    | 867            | 8     |
|             | Bank/S&L        | 23          | 2,706           | 833    | 2,014          | 620   | 94             | 28    |
|             | Finan/Insur     | 50          | 1,653           | 117    | 1,226          | 86    | 29             | 1     |
|             | Med/Educ        | 198         | 195,071         | 2,025  | 11,148         | 107   | 5,062          | 40    |
|             | Svce Industr    | 58          | 70,357          | 1,735  | 3,036          | 75    | 150            | 3     |
|             | EOP Svcs        | 163         | 33,460          | 533    | 1,901          | 27    | 17,513         | 124   |
|             | Govt (incl Fed) | 82          | 163,796         | 4,232  | 29,400         | 745   | 3,755          | 95    |
|             | Agr/Min/Constr  | 65          | 10,515          | 467    | 2,057          | 103   | 29             | 2     |
|             | -- TOTAL IND    | 1,346       | 1,088,646       | 13,682 | 117,512        | 2,293 | 58,526         | 415   |



IBM South Bay Market Survey  
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-->Sort by: No of Firms

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| County      | Industry        | No of<br>Firms | -- Employees -- |        | -- Revenues -- |       | ---- MIPS ---- |       |
|-------------|-----------------|----------------|-----------------|--------|----------------|-------|----------------|-------|
|             |                 |                | Tot             | Avg    | Tot            | Avg   | Tot            | Avg   |
| MONTEREY    | WDis/RDis       | 24             | 2,641           | 110    | 893            | 37    | 34.4           | 1.4   |
|             | Govt (incl Fed) | 23             | 31,704          | 1,378  | 6,067          | 264   | 695.4          | 30.2  |
|             | Med/Educ        | 21             | 5,546           | 264    | 244            | 12    | 59.0           | 2.8   |
|             | Agr/Min/Constr  | 20             | 2,431           | 122    | 681            | 34    | 13.5           | 0.7   |
|             | Proc Mfgr       | 13             | 2,838           | 218    | 294            | 23    | 35.9           | 2.8   |
|             | Finan/Insur     | 9              | 257             | 29     | 190            | 21    | 3.6            | 0.4   |
|             | Svce Industr    | 8              | 1,983           | 248    | 88             | 11    | 2.7            | 0.3   |
|             | Diser Mfg       | 5              | 436             | 87     | 45             | 9     | 4.3            | 0.9   |
|             | EDP Svcs        | 5              | 304             | 61     | 14             | 3     | 23.2           | 4.6   |
|             | Trans/Util      | 5              | 231             | 46     | 100            | 20    | 0.9            | 0.2   |
|             | Bank/S&L        | 2              | 1,128           | 564    | 840            | 420   | 42.0           | 21.0  |
|             | -- TOTAL IND    | 135            | 49,499          | 3,127  | 9,456          | 854   | 915            | 65    |
| SAN BENITO  | Proc Mfgr       | 3              | 570             | 190    | 58             | 19    | 4.3            | 1.4   |
|             | WDis/RDis       | 3              | 154             | 51     | 11             | 4     | 0.2            | 0.1   |
|             | Agr/Min/Constr  | 1              | 136             | 136    | 38             | 38    | 0.0            | 0.0   |
|             | Med/Educ        | 1              | 40              | 40     | 2              | 2     | 0.0            | 0.0   |
|             | -- TOTAL IND    | 8              | 900             | 417    | 109            | 63    | 5              | 2     |
| SANTA CLARA | Diser Mfg       | 387            | 550,480         | 1,422  | 54,787         | 142   | 30,282.7       | 78.2  |
|             | Med/Educ        | 165            | 182,736         | 1,107  | 10,587         | 64    | 4,919.0        | 29.8  |
|             | EDP Svcs        | 153            | 31,833          | 208    | 1,829          | 12    | 17,466.7       | 114.2 |
|             | WDis/RDis       | 126            | 18,633          | 148    | 4,317          | 34    | 824.3          | 6.5   |
|             | Proc Mfgr       | 54             | 12,197          | 226    | 1,254          | 34    | 211.5          | 3.9   |
|             | Govt (incl Fed) | 50             | 129,550         | 2,591  | 23,179         | 464   | 3,019.9        | 60.4  |
|             | Svce Industr    | 48             | 68,244          | 1,422  | 2,943          | 61    | 147.6          | 3.1   |
|             | Finan/Insur     | 39             | 1,286           | 33     | 954            | 24    | 25.7           | 0.7   |
|             | Trans/Util      | 38             | 8,844           | 233    | 3,409          | 90    | 259.1          | 6.8   |
|             | Agr/Min/Constr  | 35             | 6,478           | 185    | 960            | 27    | 8.5            | 0.2   |
|             | Bank/S&L        | 20             | 1,378           | 69     | 1,025          | 51    | 47.1           | 2.4   |
|             | -- TOTAL IND    | 1,115          | 1,011,659       | 7,644  | 105,244        | 1,003 | 57,212         | 306   |
| SANTA CRUZ  | Diser Mfg       | 17             | 8,729           | 513    | 901            | 53    | 190.1          | 11.2  |
|             | WDis/RDis       | 17             | 1,022           | 60     | 172            | 10    | 7.6            | 0.4   |
|             | Med/Educ        | 11             | 6,749           | 614    | 315            | 29    | 84.3           | 7.7   |
|             | Proc Mfgr       | 11             | 4,170           | 379    | 427            | 39    | 8.3            | 0.8   |
|             | Agr/Min/Constr  | 10             | 1,606           | 161    | 416            | 42    | 7.4            | 0.7   |
|             | Govt (incl Fed) | 9              | 2,542           | 282    | 154            | 17    | 39.8           | 4.4   |
|             | EDP Svcs        | 5              | 1,323           | 265    | 58             | 12    | 23.4           | 4.7   |
|             | Trans/Util      | 4              | 143             | 36     | 62             | 16    | 28.8           | 7.2   |
|             | Svce Industr    | 2              | 130             | 65     | 5              | 3     | 0.0            | 0.0   |
|             | Finan/Insur     | 2              | 110             | 55     | 82             | 41    | 0.0            | 0.0   |
|             | Bank/S&L        | 1              | 200             | 200    | 149            | 149   | 4.7            | 4.7   |
|             | -- TOTAL IND    | 89             | 26,724          | 2,630  | 2,741          | 411   | 394            | 42    |
| **TOTAL     | Diser Mfg       | 409            | 559,645         | 2,023  | 55,733         | 204   | 30,477         | 90    |
|             | Med/Educ        | 198            | 195,071         | 2,025  | 11,148         | 107   | 5,062          | 40    |
|             | WDis/RDis       | 170            | 22,450          | 369    | 5,393          | 85    | 86.7           | 8     |
|             | EDP Svcs        | 163            | 33,460          | 533    | 1,901          | 27    | 17,513         | 124   |
|             | Govt (incl Fed) | 82             | 163,796         | 4,252  | 29,400         | 745   | 3,755          | 95    |
|             | Proc Mfgr       | 81             | 19,775          | 1,013  | 2,033          | 115   | 260            | 9     |
|             | Agr/Min/Constr  | 65             | 10,515          | 467    | 2,057          | 103   | 29             | 2     |
|             | Svce Industr    | 58             | 70,357          | 1,735  | 3,036          | 75    | 150            | 3     |
|             | Finan/Insur     | 50             | 1,653           | 117    | 1,226          | 86    | 29             | 1     |
|             | Trans/Util      | 47             | 9,218           | 315    | 3,571          | 126   | 289            | 14    |
|             | Bank/S&L        | 23             | 2,706           | 833    | 2,014          | 620   | 94             | 28    |
|             | -- TOTAL IND    | 1,346          | 1,088,646       | 13,682 | 117,512        | 2,293 | 58,526         | 415   |



IBM South Bay Market Survey  
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-->Sort by: No of Empl - Total

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| County      | Industry        | No of<br>Firms | -- Employees -- |        | -- Revenues -- |       | ---- MIPS ---- |       |
|-------------|-----------------|----------------|-----------------|--------|----------------|-------|----------------|-------|
|             |                 |                | Tot             | Avg    | Tot            | Avg   | Tot            | Avg   |
| MONTEREY    | Govt (incl Fed) | 23             | 31,704          | 1,378  | 6,067          | 264   | 695.4          | 30.2  |
|             | Med/Educ        | 21             | 5,546           | 264    | 244            | 12    | 59.0           | 2.8   |
|             | Proc Mfgr       | 13             | 2,838           | 218    | 294            | 23    | 35.9           | 2.8   |
|             | Wdis/RDis       | 24             | 2,641           | 110    | 893            | 37    | 34.4           | 1.4   |
|             | Agr/Min/Constr  | 20             | 2,431           | 122    | 681            | 34    | 13.5           | 0.7   |
|             | Svce Industr    | 8              | 1,983           | 248    | 88             | 11    | 2.7            | 0.3   |
|             | Bank/S&L        | 2              | 1,128           | 564    | 840            | 420   | 42.0           | 21.0  |
|             | Discr Mfg       | 5              | 436             | 87     | 45             | 9     | 4.3            | 0.9   |
|             | EDP Svcs        | 5              | 304             | 61     | 14             | 3     | 23.2           | 4.6   |
|             | Finan/Insur     | 9              | 257             | 29     | 190            | 21    | 3.6            | 0.4   |
|             | Trans/Util      | 5              | 231             | 46     | 100            | 20    | 0.9            | 0.2   |
|             | -- TOTAL IND    | 135            | 49,499          | 3,127  | 9,456          | 854   | 915            | 65    |
| SAN BENITO  | Proc Mfgr       | 3              | 570             | 190    | 58             | 19    | 4.3            | 1.4   |
|             | Wdis/RDis       | 3              | 154             | 51     | 11             | 4     | 0.2            | 0.1   |
|             | Agr/Min/Constr  | 1              | 136             | 136    | 38             | 38    | 0.0            | 0.0   |
|             | Med/Educ        | 1              | 40              | 40     | 2              | 2     | 0.0            | 0.0   |
|             | -- TOTAL IND    | 8              | 900             | 417    | 109            | 63    | 5              | 2     |
| SANTA CLARA | Discr Mfg       | 387            | 550,480         | 1,422  | 54,787         | 142   | 30,282.7       | 78.2  |
|             | Med/Educ        | 165            | 182,736         | 1,107  | 10,587         | 64    | 4,919.0        | 29.8  |
|             | Govt (incl Fed) | 50             | 129,550         | 2,591  | 23,179         | 464   | 3,019.9        | 60.4  |
|             | Svce Industr    | 48             | 68,244          | 1,422  | 2,943          | 61    | 147.6          | 3.1   |
|             | EDP Svcs        | 153            | 31,833          | 208    | 1,829          | 12    | 17,466.7       | 114.2 |
|             | Wdis/RDis       | 126            | 18,633          | 148    | 4,317          | 34    | 824.3          | 6.5   |
|             | Proc Mfgr       | 54             | 12,197          | 226    | 1,254          | 34    | 211.5          | 3.9   |
|             | Trans/Util      | 38             | 8,844           | 233    | 3,409          | 90    | 259.1          | 6.8   |
|             | Agr/Min/Constr  | 35             | 6,478           | 185    | 960            | 27    | 8.5            | 0.2   |
|             | Bank/S&L        | 20             | 1,378           | 69     | 1,025          | 51    | 47.1           | 2.4   |
|             | Finan/Insur     | 39             | 1,286           | 33     | 954            | 24    | 25.7           | 0.7   |
|             | -- TOTAL IND    | 1,115          | 1,011,659       | 7,644  | 105,244        | 1,003 | 57,212         | 306   |
| SANTA CRUZ  | Discr Mfg       | 17             | 8,729           | 513    | 901            | 53    | 190.1          | 11.2  |
|             | Med/Educ        | 11             | 6,749           | 614    | 315            | 29    | 84.3           | 7.7   |
|             | Proc Mfgr       | 11             | 4,170           | 379    | 427            | 39    | 8.3            | 0.8   |
|             | Govt (incl Fed) | 9              | 2,542           | 282    | 154            | 17    | 39.8           | 4.4   |
|             | Agr/Min/Constr  | 10             | 1,606           | 161    | 416            | 42    | 7.4            | 0.7   |
|             | EDP Svcs        | 5              | 1,323           | 265    | 58             | 12    | 23.4           | 4.7   |
|             | Wdis/RDis       | 17             | 1,022           | 60     | 172            | 10    | 7.6            | 0.4   |
|             | Bank/S&L        | 1              | 200             | 200    | 149            | 149   | 4.7            | 4.7   |
|             | Svce Industr    | 4              | 143             | 36     | 62             | 16    | 28.8           | 7.2   |
|             | Trans/Util      | 2              | 130             | 65     | 5              | 3     | 0.0            | 0.0   |
|             | Finan/Insur     | 2              | 110             | 55     | 82             | 41    | 0.0            | 0.0   |
|             | -- TOTAL IND    | 89             | 26,724          | 2,630  | 2,741          | 411   | 394            | 42    |
| **TOTAL     | Discr Mfg       | 409            | 559,645         | 2,023  | 55,733         | 204   | 30,477         | 90    |
|             | Med/Educ        | 198            | 195,071         | 2,025  | 11,148         | 107   | 5,062          | 40    |
|             | Govt (incl Fed) | 82             | 163,796         | 4,252  | 29,400         | 745   | 3,755          | 95    |
|             | Svce Industr    | 58             | 70,357          | 1,735  | 3,036          | 75    | 150            | 3     |
|             | EDP Svcs        | 163            | 33,460          | 533    | 1,901          | 27    | 17,513         | 124   |
|             | Wdis/RDis       | 170            | 22,450          | 369    | 5,393          | 85    | 867            | 8     |
|             | Proc Mfgr       | 81             | 19,775          | 1,013  | 2,033          | 115   | 260            | 9     |
|             | Agr/Min/Constr  | 65             | 10,515          | 467    | 2,057          | 103   | 29             | 2     |
|             | Trans/Util      | 47             | 9,218           | 315    | 3,571          | 126   | 289            | 14    |
|             | Bank/S&L        | 23             | 2,706           | 833    | 2,014          | 620   | 94             | 28    |
|             | Finan/Insur     | 50             | 1,653           | 117    | 1,226          | 86    | 29             | 1     |
|             | -- TOTAL IND    | 1,346          | 1,088,646       | 13,682 | 117,512        | 2,293 | 58,526         | 415   |



IBM South Bay Market Survey  
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-->Sort by: No of Empl - Avg

Computer Intelligence Database Tabulation  
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| County      | Industry        | No of Firms | -- Employees -- |        | -- Revenues -- |       | ---- MIPS ---- |       |
|-------------|-----------------|-------------|-----------------|--------|----------------|-------|----------------|-------|
|             |                 |             | Tot             | Avg    | Tot            | Avg   | Tot            | Avg   |
| MONTEREY    | Govt (incl Fed) | 23          | 31,704          | 1,378  | 6,067          | 264   | 695.4          | 30.2  |
|             | Bank/S&L        | 2           | 1,128           | 564    | 840            | 420   | 42.0           | 21.0  |
|             | Med/Educ        | 21          | 5,546           | 264    | 244            | 12    | 59.0           | 2.8   |
|             | Svce Industr    | 8           | 1,983           | 248    | 88             | 11    | 2.7            | 0.3   |
|             | Proc Mfg        | 13          | 2,838           | 218    | 294            | 23    | 35.9           | 2.8   |
|             | Agr/Min/Constr  | 20          | 2,431           | 122    | 681            | 34    | 13.5           | 0.7   |
|             | Wdis/RDis       | 24          | 2,641           | 110    | 893            | 37    | 34.4           | 1.4   |
|             | Disc Mfg        | 5           | 436             | 87     | 45             | 9     | 4.3            | 0.9   |
|             | EDP Svcs        | 5           | 304             | 61     | 14             | 3     | 23.2           | 4.6   |
|             | Trans/Util      | 5           | 231             | 46     | 100            | 20    | 0.9            | 0.2   |
|             | Finan/Insur     | 9           | 257             | 29     | 190            | 21    | 3.6            | 0.4   |
|             | -- TOTAL IND    | 135         | 49,499          | 3,127  | 9,456          | 854   | 915            | 65    |
| SAN BENITO  | Proc Mfg        | 3           | 570             | 190    | 58             | 19    | 4.3            | 1.4   |
|             | Agr/Min/Constr  | 1           | 136             | 136    | 38             | 38    | 0.0            | 0.0   |
|             | Wdis/RDis       | 3           | 154             | 51     | 11             | 4     | 0.2            | 0.1   |
|             | Med/Educ        | 1           | 40              | 40     | 2              | 2     | 0.0            | 0.0   |
|             | -- TOTAL IND    | 8           | 900             | 417    | 109            | 63    | 5              | 2     |
| SANTA CLARA | Govt (incl Fed) | 50          | 129,550         | 2,591  | 23,179         | 464   | 3,019.9        | 60.4  |
|             | Disc Mfg        | 387         | 550,480         | 1,422  | 54,787         | 142   | 30,282.7       | 78.2  |
|             | Svce Industr    | 48          | 68,244          | 1,422  | 2,943          | 61    | 147.6          | 3.1   |
|             | Med/Educ        | 165         | 182,736         | 1,107  | 10,587         | 64    | 4,919.0        | 29.8  |
|             | Trans/Util      | 38          | 8,844           | 233    | 3,409          | 90    | 259.1          | 6.8   |
|             | Proc Mfg        | 54          | 12,197          | 226    | 1,254          | 34    | 211.5          | 3.9   |
|             | EDP Svcs        | 153         | 31,833          | 208    | 1,829          | 12    | 17,466.7       | 114.2 |
|             | Agr/Min/Constr  | 35          | 6,478           | 185    | 960            | 27    | 8.5            | 0.2   |
|             | Wdis/RDis       | 126         | 18,633          | 148    | 4,317          | 34    | 824.3          | 6.5   |
|             | Bank/S&L        | 20          | 1,378           | 69     | 1,025          | 51    | 47.1           | 2.4   |
|             | Finan/Insur     | 39          | 1,286           | 33     | 954            | 24    | 25.7           | 0.7   |
|             | -- TOTAL IND    | 1,115       | 1,011,659       | 7,644  | 105,244        | 1,003 | 57,212         | 306   |
| SANTA CRUZ  | Med/Educ        | 11          | 6,749           | 614    | 315            | 29    | 84.3           | 7.7   |
|             | Disc Mfg        | 17          | 8,729           | 513    | 901            | 53    | 190.1          | 11.2  |
|             | Proc Mfg        | 11          | 4,170           | 379    | 427            | 39    | 8.3            | 0.8   |
|             | Govt (incl Fed) | 9           | 2,542           | 282    | 154            | 17    | 39.8           | 4.4   |
|             | EDP Svcs        | 5           | 1,323           | 265    | 58             | 12    | 23.4           | 4.7   |
|             | Bank/S&L        | 1           | 200             | 200    | 149            | 149   | 4.7            | 4.7   |
|             | Agr/Min/Constr  | 10          | 1,606           | 161    | 416            | 42    | 7.4            | 0.7   |
|             | Svce Industr    | 2           | 130             | 65     | 5              | 3     | 0.0            | 0.0   |
|             | Wdis/RDis       | 17          | 1,022           | 60     | 172            | 10    | 7.6            | 0.4   |
|             | Finan/Insur     | 2           | 110             | 55     | 82             | 41    | 0.0            | 0.0   |
|             | Trans/Util      | 4           | 143             | 36     | 62             | 16    | 28.8           | 7.2   |
|             | -- TOTAL IND    | 89          | 26,724          | 2,630  | 2,741          | 411   | 394            | 42    |
| **TOTAL     | Govt (incl Fed) | 82          | 163,796         | 4,252  | 29,400         | 745   | 3,755          | 95    |
|             | Med/Educ        | 196         | 195,071         | 2,025  | 11,148         | 107   | 5,062          | 40    |
|             | Disc Mfg        | 409         | 559,645         | 2,023  | 55,733         | 204   | 30,477         | 90    |
|             | Svce Industr    | 58          | 70,357          | 1,735  | 3,036          | 75    | 150            | 3     |
|             | Proc Mfg        | 81          | 19,775          | 1,013  | 2,033          | 115   | 260            | 9     |
|             | Bank/S&L        | 23          | 2,706           | 833    | 2,014          | 620   | 94             | 28    |
|             | EDP Svcs        | 163         | 33,460          | 533    | 1,901          | 27    | 17,513         | 124   |
|             | Agr/Min/Constr  | 65          | 10,515          | 467    | 2,057          | 103   | 29             | 2     |
|             | Wdis/RDis       | 170         | 22,450          | 369    | 5,393          | 85    | 867            | 8     |
|             | Trans/Util      | 47          | 9,218           | 315    | 3,571          | 126   | 280            | 14    |
|             | Finan/Insur     | 50          | 1,653           | 117    | 1,226          | 86    | 29             | 1     |
|             | -- TOTAL IND    | 1,346       | 1,088,646       | 13,682 | 117,512        | 2,293 | 58,526         | 415   |



IBM South Bay Market Survey  
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-->Sort by: MIPS - Total

Computer Intelligence Database Tabulation  
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| County      | Industry        | No of<br>Firms | -- Employees -- |        | -- Revenues -- |       | ---- MIPS ---- |       |
|-------------|-----------------|----------------|-----------------|--------|----------------|-------|----------------|-------|
|             |                 |                | Tot             | Avg    | Tot            | Avg   | Tot            | Avg   |
| MONTEREY    | Govt (incl Fed) | 23             | 31,704          | 1,378  | 6,067          | 264   | 695.4          | 30.2  |
|             | Med/Educ        | 21             | 5,546           | 264    | 244            | 12    | 59.0           | 2.8   |
|             | Bank/S&L        | 2              | 1,128           | 564    | 840            | 420   | 42.0           | 21.0  |
|             | Proc Mfgr       | 13             | 2,838           | 218    | 294            | 23    | 35.9           | 2.8   |
|             | WDis/RDis       | 24             | 2,641           | 110    | 893            | 37    | 34.4           | 1.4   |
|             | EDP Svcs        | 5              | 304             | 61     | 3              | 3     | 25.2           | 4.6   |
|             | Agr/Min/Constr  | 20             | 2,431           | 122    | 681            | 34    | 13.5           | 0.7   |
|             | Discr Mfg       | 5              | 436             | 87     | 45             | 9     | 4.3            | 0.9   |
|             | Finan/Insur     | 9              | 257             | 29     | 190            | 21    | 3.6            | 0.4   |
|             | Svce Industr    | 8              | 1,983           | 248    | 88             | 11    | 2.7            | 0.3   |
|             | Trans/Util      | 5              | 231             | 46     | 100            | 20    | 0.9            | 0.2   |
|             | -- TOTAL IND    | 135            | 49,499          | 3,127  | 9,456          | 854   | 915            | 65    |
| SAN BENITO  | Proc Mfgr       | 3              | 570             | 190    | 58             | 19    | 4.3            | 1.4   |
|             | WDis/RDis       | 3              | 154             | 51     | 11             | 4     | 0.2            | 0.1   |
|             | Agr/Min/Constr  | 1              | 136             | 136    | 38             | 38    | 0.0            | 0.0   |
|             | Med/Educ        | 1              | 40              | 40     | 2              | 2     | 0.0            | 0.0   |
|             | -- TOTAL IND    | 8              | 900             | 417    | 109            | 63    | 5              | 2     |
| SANTA CLARA | Discr Mfg       | 387            | 550,480         | 1,422  | 54,787         | 142   | 30,282.7       | 78.2  |
|             | EDP Svcs        | 153            | 31,833          | 208    | 1,829          | 12    | 17,466.7       | 114.2 |
|             | Med/Educ        | 165            | 182,736         | 1,107  | 10,587         | 64    | 4,919.0        | 29.8  |
|             | Govt (incl Fed) | 50             | 129,550         | 2,591  | 23,179         | 464   | 3,019.9        | 60.4  |
|             | WDis/RDis       | 126            | 18,633          | 148    | 4,317          | 34    | 824.3          | 6.5   |
|             | Trans/Util      | 38             | 8,844           | 233    | 3,409          | 90    | 259.1          | 6.8   |
|             | Proc Mfgr       | 54             | 12,197          | 226    | 1,254          | 34    | 211.5          | 3.9   |
|             | Svce Industr    | 48             | 68,244          | 1,422  | 2,943          | 61    | 147.6          | 3.1   |
|             | Bank/S&L        | 20             | 1,378           | 69     | 1,025          | 51    | 47.1           | 2.4   |
|             | Finan/Insur     | 39             | 1,286           | 33     | 954            | 24    | 25.7           | 0.7   |
|             | Agr/Min/Constr  | 35             | 6,478           | 185    | 960            | 27    | 8.5            | 0.2   |
|             | -- TOTAL IND    | 1,115          | 1,011,659       | 7,644  | 105,244        | 1,003 | 57,212         | 306   |
| SANTA CRUZ  | Discr Mfg       | 17             | 8,729           | 513    | 901            | 53    | 190.1          | 11.2  |
|             | Med/Educ        | 11             | 6,749           | 614    | 315            | 29    | 84.3           | 7.7   |
|             | Govt (incl Fed) | 9              | 2,542           | 282    | 154            | 17    | 39.8           | 4.4   |
|             | Trans/Util      | 4              | 143             | 36     | 62             | 16    | 28.8           | 7.2   |
|             | EDP Svcs        | 5              | 1,323           | 265    | 58             | 12    | 23.4           | 4.7   |
|             | Proc Mfgr       | 11             | 4,170           | 379    | 427            | 39    | 8.3            | 0.8   |
|             | WDis/RDis       | 17             | 1,022           | 60     | 172            | 10    | 7.6            | 0.4   |
|             | Agr/Min/Constr  | 10             | 1,606           | 161    | 416            | 42    | 7.4            | 0.7   |
|             | Bank/S&L        | 1              | 200             | 200    | 149            | 149   | 4.7            | 4.7   |
|             | Svce Industr    | 2              | 130             | 65     | 5              | 3     | 0.0            | 0.0   |
|             | Finan/Insur     | 2              | 110             | 55     | 82             | 41    | 0.0            | 0.0   |
|             | -- TOTAL IND    | 89             | 26,724          | 2,630  | 2,741          | 411   | 394            | 42    |
| **TOTAL     | Discr Mfg       | 409            | 559,645         | 2,023  | 55,733         | 204   | 30,477         | 90    |
|             | EDP Svcs        | 163            | 33,460          | 533    | 1,901          | 27    | 17,513         | 124   |
|             | Med/Educ        | 198            | 195,071         | 2,025  | 11,148         | 107   | 5,062          | 40    |
|             | Govt (incl Fed) | 82             | 163,796         | 4,252  | 29,400         | 745   | 3,755          | 95    |
|             | WDis/RDis       | 170            | 22,450          | 369    | 5,393          | 85    | 867            | 8     |
|             | Trans/Util      | 47             | 9,218           | 315    | 3,571          | 126   | 289            | 14    |
|             | Proc Mfgr       | 81             | 19,775          | 1,013  | 2,033          | 115   | 260            | 9     |
|             | Svce Industr    | 58             | 70,357          | 1,735  | 3,036          | 75    | 150            | 3     |
|             | Bank/S&L        | 23             | 2,706           | 833    | 2,014          | 620   | 94             | 28    |
|             | Agr/Min/Constr  | 65             | 10,515          | 467    | 2,057          | 103   | 29             | 2     |
|             | Finan/Insur     | 50             | 1,653           | 117    | 1,226          | 86    | 29             | 1     |
|             | -- TOTAL IND    | 1,346          | 1,088,646       | 13,682 | 117,512        | 2,293 | 58,526         | 415   |



IBM South Bay Market Survey  
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-->Sort by: MIPS - Avg

Computer Intelligence Database Tabulation  
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| County      | Industry        | No of<br>Firms | -- Employees -- |        | -- Revenues -- |       | ---- MIPS ---- |       |
|-------------|-----------------|----------------|-----------------|--------|----------------|-------|----------------|-------|
|             |                 |                | Tot             | Avg    | Tot            | Avg   | Tot            | Avg   |
| MONTEREY    | Govt (incl Fed) | 23             | 31,704          | 1,378  | 6,067          | 264   | 695.4          | 30.2  |
|             | Bank/S&L        | 2              | 1,128           | 564    | 840            | 420   | 42.0           | 21.0  |
|             | EDP Svcs        | 5              | 304             | 61     | 14             | 3     | 23.2           | 4.6   |
|             | Med/Educ        | 21             | 5,546           | 264    | 244            | 12    | 59.0           | 2.8   |
|             | Proc Mfgr       | 13             | 2,838           | 218    | 294            | 23    | 35.9           | 2.8   |
|             | Wdis/RDis       | 24             | 2,641           | 110    | 893            | 37    | 34.4           | 1.4   |
|             | Discr Mfg       | 5              | 436             | 87     | 45             | 9     | 4.3            | 0.9   |
|             | Agr/Min/Constr  | 20             | 2,431           | 122    | 681            | 34    | 13.5           | 0.7   |
|             | Finan/Insur     | 9              | 257             | 29     | 190            | 21    | 3.6            | 0.4   |
|             | Svce Industr    | 8              | 1,983           | 248    | 88             | 11    | 2.7            | 0.3   |
|             | Trans/Util      | 5              | 231             | 46     | 100            | 20    | 0.9            | 0.2   |
|             | -- TOTAL IND    | 135            | 49,499          | 3,127  | 9,456          | 854   | 915            | 65    |
| SAN BENITO  | Proc Mfgr       | 3              | 570             | 190    | 58             | 19    | 4.3            | 1.4   |
|             | Wdis/RDis       | 3              | 154             | 51     | 11             | 4     | 0.2            | 0.1   |
|             | Agr/Min/Constr  | 1              | 136             | 136    | 38             | 38    | 0.0            | 0.0   |
|             | Med/Educ        | 1              | 40              | 40     | 2              | 2     | 0.0            | 0.0   |
|             | -- TOTAL IND    | 8              | 900             | 417    | 109            | 63    | 5              | 2     |
| SANTA CLARA | EDP Svcs        | 153            | 31,833          | 208    | 1,829          | 12    | 17,466.7       | 114.2 |
|             | Discr Mfg       | 387            | 550,480         | 1,422  | 54,787         | 142   | 30,282.7       | 78.2  |
|             | Govt (incl Fed) | 50             | 129,550         | 2,591  | 23,179         | 464   | 3,019.9        | 60.4  |
|             | Med/Educ        | 165            | 182,736         | 1,107  | 10,587         | 64    | 4,919.0        | 29.8  |
|             | Trans/Util      | 38             | 8,844           | 233    | 3,409          | 90    | 259.1          | 6.8   |
|             | Wdis/RDis       | 126            | 18,633          | 148    | 4,317          | 34    | 824.3          | 6.5   |
|             | Proc Mfgr       | 54             | 12,197          | 226    | 1,254          | 34    | 211.5          | 3.9   |
|             | Svce Industr    | 48             | 68,244          | 1,422  | 2,943          | 61    | 147.6          | 3.1   |
|             | Bank/S&L        | 20             | 1,378           | 69     | 1,025          | 51    | 47.1           | 2.4   |
|             | Finan/Insur     | 39             | 1,286           | 33     | 954            | 24    | 25.7           | 0.7   |
|             | Agr/Min/Constr  | 35             | 6,478           | 185    | 960            | 27    | 8.5            | 0.2   |
|             | -- TOTAL IND    | 1,115          | 1,011,659       | 7,644  | 105,244        | 1,003 | 57,212         | 306   |
| SANTA CRUZ  | Discr Mfg       | 17             | 8,729           | 513    | 901            | 53    | 190.1          | 11.2  |
|             | Med/Educ        | 11             | 6,749           | 614    | 315            | 29    | 84.3           | 7.7   |
|             | Trans/Util      | 4              | 143             | 36     | 62             | 16    | 28.8           | 7.2   |
|             | EDP Svcs        | 5              | 1,323           | 265    | 58             | 12    | 23.4           | 4.7   |
|             | Bank/S&L        | 1              | 200             | 200    | 149            | 149   | 4.7            | 4.7   |
|             | Govt (incl Fed) | 9              | 2,542           | 282    | 154            | 17    | 39.8           | 4.4   |
|             | Proc Mfgr       | 11             | 4,170           | 379    | 427            | 39    | 8.3            | 0.8   |
|             | Agr/Min/Constr  | 10             | 1,666           | 161    | 416            | 42    | 7.4            | 0.7   |
|             | Wdis/RDis       | 17             | 1,022           | 60     | 172            | 10    | 7.6            | 0.4   |
|             | Svce Industr    | 2              | 130             | 65     | 5              | 3     | 0.0            | 0.0   |
|             | Finan/Insur     | 2              | 110             | 55     | 82             | 41    | 0.0            | 0.0   |
|             | -- TOTAL IND    | 89             | 26,724          | 2,630  | 2,741          | 411   | 394            | 42    |
| **TOTAL     | EDP Svcs        | 163            | 33,460          | 533    | 1,901          | 27    | 17,513         | 124   |
|             | Govt (incl Fed) | 82             | 163,796         | 4,252  | 29,400         | 765   | 3,755          | 95    |
|             | Discr Mfg       | 409            | 559,645         | 2,023  | 55,733         | 204   | 30,477         | 90    |
|             | Med/Educ        | 198            | 195,071         | 2,025  | 11,148         | 107   | 5,062          | 40    |
|             | Bank/S&L        | 23             | 2,706           | 833    | 2,014          | 620   | 94             | 28    |
|             | Trans/Util      | 47             | 9,218           | 315    | 3,571          | 126   | 289            | 14    |
|             | Proc Mfgr       | 81             | 19,775          | 1,013  | 2,033          | 115   | 260            | 9     |
|             | Wdis/RDis       | 170            | 22,450          | 369    | 5,393          | 85    | 867            | 8     |
|             | Svce Industr    | 58             | 70,357          | 1,735  | 3,036          | 75    | 150            | 3     |
|             | Agr/Min/Constr  | 65             | 10,515          | 467    | 2,057          | 103   | 29             | 2     |
|             | Finan/Insur     | 50             | 1,653           | 117    | 1,226          | 86    | 29             | 1     |
|             | -- TOTAL IND    | 1,346          | 1,088,646       | 13,682 | 117,512        | 2,293 | 58,526         | 415   |



Allocation of INPUT Professional Services Mkt Fcsts to CI Industry Groups  
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 \* = CI/IBM industry categories 10:55 AM from date/time shown at left)

Table sorted by:

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| Industry                | ---- INPUT 1990 Forecast ---- |       |       |        | ---- INPUT 1990-95 CAGR ---- |     |     |       | 1987            | 1988          | --- 1990 IS Expenditure \$ --- |      |      |       |
|-------------------------|-------------------------------|-------|-------|--------|------------------------------|-----|-----|-------|-----------------|---------------|--------------------------------|------|------|-------|
|                         | PFS                           | SI    | SO    | Total  | PFS                          | SI  | SO  | Total | GNP<br>(\$ bil) | Empl<br>(mil) | PFS                            | SI   | SO   | Total |
| *Discr Mfg              | 4,163                         | 977   | 482   | 5,622  | 13%                          | 25% | 22% | 16%   | 480.0           | 12,095        | 8.7                            | 2.0  | 1.0  | 11.7  |
| *Proc Mfg (incl mining) | 1,977                         | 157   | 522   | 2,656  | 14%                          | 21% | 16% | 15%   | 466.7           | 8,030         | 4.2                            | 0.3  | 1.1  | 5.7   |
| *Trans/Util/Telecom     | 1,396                         | 808   | 161   | 2,365  | 14%                          | 17% | 15% | 15%   | 408.3           | 5,230         | 3.4                            | 2.0  | 0.4  | 5.8   |
| Trans                   | 213                           | 157   | 51    | 421    | 13%                          | 19% | 16% | 16%   | 150.9           | 3,160         | 1.4                            | 1.0  | 0.3  | 2.8   |
| Util                    | 233                           | 469   | 45    | 747    | 11%                          | 14% | 15% | 13%   | 136.4           | 933           | 1.7                            | 3.4  | 0.3  | 5.5   |
| Telecom                 | 950                           | 182   | 65    | 1,197  | 15%                          | 21% | 16% | 16%   | 121.0           | 1,137         | 7.9                            | 1.5  | 0.5  | 9.9   |
| *WDis/RDis              | 534                           | 381   | 169   | 1,084  | 9%                           | 24% | 21% | 17%   | 740.4           | 25,139        | 0.7                            | 0.5  | 0.2  | 1.5   |
| WDis                    | 327                           | 140   | 92    | 559    | 9%                           | 15% | 19% | 12%   | 313.0           | 6,029         | 1.0                            | 0.4  | 0.3  | 1.8   |
| RDis                    | 207                           | 241   | 77    | 525    | 10%                          | 28% | 24% | 21%   | 427.4           | 19,110        | 0.5                            | 0.6  | 0.2  | 1.2   |
| *Bank/S&L (incl fin)    | 2,044                         | 369   | 1,931 | 4,344  | 11%                          | 28% | 16% | 15%   | 154.8           | 3,301         | 13.2                           | 2.4  | 12.5 | 28.1  |
| *Insur (excl fin)       | 1,434                         | 199   | 801   | 2,434  | 14%                          | 25% | 10% | 14%   | 101.4           | 2,082         | 14.1                           | 2.0  | 7.9  | 24.0  |
| *Med/Educ               | 330                           | 314   | 927   | 1,571  | 12%                          | 15% | 17% | 15%   | 253.3           | 8,701         | 1.3                            | 1.2  | 3.7  | 6.2   |
| Med                     | 254                           | 231   | 833   | 1,318  | 12%                          | 13% | 17% | 15%   | 223.7           | 7,144         | 1.1                            | 1.0  | 3.7  | 5.9   |
| Educ                    | 76                            | 83    | 94    | 253    | 13%                          | 18% | 12% | 14%   | 29.6            | 1,557         | 2.6                            | 2.8  | 3.2  | 8.5   |
| *Svce Industr           | 284                           | 130   | 42    | 456    | 10%                          | 25% | 20% | 16%   | 1,045.6         | 16,944        | 0.3                            | 0.1  | 0.0  | 0.4   |
| BSvcs                   | 151                           | 51    | 17    | 219    | 12%                          | 28% | 11% | 16%   | 847.3           | 7,718         | 0.2                            | 0.1  | 0.0  | 0.3   |
| CSvcs                   | 133                           | 79    | 25    | 237    | 8%                           | 23% | 25% | 16%   | 198.3           | 9,226         | 0.7                            | 0.4  | 0.1  | 1.2   |
| *EDP Svcs (n/a)         | 4,498                         | 3,069 | 2,227 | 9,794  | 10%                          | 15% | 16% | 13%   | 535.3           | 17,373        | 8.4                            | 5.7  | 4.2  | 18.3  |
| Govt (incl Fed)         | 2,136                         | 2,493 | 1,271 | 5,900  | 4%                           | 13% | 10% | 10%   | 181.3           | 2,971         | 11.8                           | 13.8 | 7.0  | 32.5  |
| * Fed                   | 2,362                         | 576   | 956   | 3,894  | 14%                          | 23% | 21% | 18%   | 354.0           | 14,402        | 6.7                            | 1.6  | 2.7  | 11.0  |
| * St&Loc                | 104                           | 6     | 0     | 110    | 12%                          | 34% | NA  | 14%   | 313.4           | 8,384         | 0.3                            | 0.0  | 0.0  | 0.4   |
| *Agr/Cons (excl mining) |                               |       |       |        |                              |     |     |       |                 |               |                                |      |      |       |
| -- TOTAL IND            | 16,764                        | 6,410 | 7,262 | 30,436 | 12%                          | 19% | 16% | 15%   | 4,499.2         | 107,279       | 54.7                           | 16.3 | 31.0 | 102.0 |



Allocation of INPUT Professional Services Mkt Fcsts to CI Industry Groups  
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 \* = CI/IBM industry categories 10:55 AM from date/time shown at left)

Table sorted by:

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| Industry                | ---- INPUT 1990 Forecast ---- |       |       |        | ---- INPUT 1990-95 CAGR ---- |     |     |       | 1987            | 1988          | --- 1990 IS Expenditure \$ --- |     |       |       |
|-------------------------|-------------------------------|-------|-------|--------|------------------------------|-----|-----|-------|-----------------|---------------|--------------------------------|-----|-------|-------|
|                         | PFS                           | SI    | SO    | Total  | PFS                          | SI  | SO  | Total | GNP<br>(\$ bil) | Empl<br>(mil) | PFS                            | SI  | SO    | Total |
| *Discr Mfg              | 4,163                         | 977   | 482   | 5,622  | 13%                          | 25% | 22% | 16%   | 480.0           | 12,095        | 344                            | 81  | 40    | 465   |
| *Proc Mfg (incl mining) | 1,977                         | 157   | 522   | 2,656  | 14%                          | 21% | 16% | 15%   | 466.7           | 8,030         | 246                            | 20  | 65    | 331   |
| *Trans/Util/Telecom     | 1,396                         | 808   | 161   | 2,365  | 14%                          | 17% | 15% | 15%   | 408.3           | 5,230         | 267                            | 154 | 31    | 452   |
| Trans                   | 213                           | 157   | 51    | 421    | 13%                          | 19% | 16% | 16%   | 150.9           | 3,160         | 67                             | 50  | 16    | 133   |
| Util                    | 233                           | 469   | 45    | 747    | 11%                          | 14% | 15% | 13%   | 136.4           | 933           | 250                            | 503 | 48    | 801   |
| Telecom                 | 950                           | 182   | 65    | 1,197  | 15%                          | 21% | 16% | 16%   | 121.0           | 1,137         | 836                            | 160 | 57    | 1,053 |
| *MDis/RDis              | 534                           | 381   | 169   | 1,084  | 9%                           | 24% | 21% | 17%   | 740.4           | 25,139        | 21                             | 15  | 7     | 43    |
| MDis                    | 327                           | 140   | 92    | 559    | 9%                           | 15% | 19% | 12%   | 313.0           | 6,029         | 54                             | 23  | 15    | 93    |
| RDis                    | 207                           | 241   | 77    | 525    | 10%                          | 28% | 24% | 21%   | 427.4           | 19,110        | 11                             | 13  | 4     | 27    |
| *Bank/S&L (incl fin)    | 2,044                         | 369   | 1,931 | 4,344  | 11%                          | 28% | 16% | 15%   | 154.8           | 3,301         | 619                            | 112 | 585   | 1,316 |
| *Insur (excl fin)       | 1,434                         | 199   | 801   | 2,434  | 14%                          | 25% | 10% | 14%   | 101.4           | 2,082         | 689                            | 96  | 385   | 1,169 |
| *Med/Educ               | 330                           | 314   | 927   | 1,571  | 12%                          | 15% | 17% | 15%   | 253.3           | 8,701         | 38                             | 36  | 107   | 181   |
| Med                     | 254                           | 231   | 833   | 1,318  | 12%                          | 13% | 17% | 15%   | 223.7           | 7,144         | 36                             | 32  | 117   | 184   |
| Educ                    | 76                            | 83    | 94    | 253    | 13%                          | 18% | 12% | 14%   | 29.6            | 1,557         | 49                             | 53  | 60    | 162   |
| *Svce Industr           | 284                           | 130   | 42    | 456    | 10%                          | 25% | 20% | 16%   | 1,045.6         | 16,944        | 17                             | 8   | 2     | 27    |
| BSvcs                   | 151                           | 51    | 17    | 219    | 12%                          | 28% | 11% | 16%   | 847.3           | 7,718         | 20                             | 7   | 2     | 28    |
| CSvcs                   | 133                           | 79    | 25    | 237    | 8%                           | 23% | 25% | 16%   | 198.3           | 9,226         | 14                             | 9   | 3     | 26    |
| *EDP Svcs (n/a)         | --                            | --    | --    | --     | --                           | --  | --  | --    | --              | --            | --                             | --  | --    | --    |
| Govt (incl Fed)         | 4,498                         | 3,069 | 2,227 | 9,794  | 10%                          | 15% | 16% | 13%   | 535.3           | 17,373        | 259                            | 177 | 128   | 564   |
| * Fed                   | 2,136                         | 2,493 | 1,271 | 5,900  | 4%                           | 13% | 10% | 10%   | 181.3           | 2,971         | 719                            | 839 | 428   | 1,986 |
| * St&Loc                | 2,362                         | 576   | 956   | 3,894  | 14%                          | 23% | 21% | 18%   | 354.0           | 14,402        | 164                            | 40  | 66    | 270   |
| *Agr/Cons (excl mining) | 104                           | 6     | 0     | 110    | 12%                          | 34% | NA  | 14%   | 313.4           | 8,384         | 12                             | 1   | 0     | 13    |
| -- TOTAL IND            | 16,764                        | 6,410 | 7,262 | 30,436 | 12%                          | 19% | 16% | 15%   | 4,499.2         | 107,279       | 2,513                          | 698 | 1,349 | 4,560 |



Allocation of INPUT Professional Services Mkt Fcsts to CI Industry Groups  
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| Industry                  | ---- INPUT 1990 Forecast ---- |       |       |        | ---- INPUT 1990-95 CAGR ---- |     |     |       | 1987            | 1988          | --- 1990 IS Expenditure \$ --- |      |      |       |
|---------------------------|-------------------------------|-------|-------|--------|------------------------------|-----|-----|-------|-----------------|---------------|--------------------------------|------|------|-------|
|                           | PFS                           | SI    | SO    | Total  | PFS                          | SI  | SO  | Total | GNP<br>(\$ bil) | Empl<br>(mil) | PFS                            | SI   | SO   | Total |
| Govt (incl Fed)           | 4,498                         | 3,069 | 2,227 | 9,794  | 10%                          | 15% | 16% | 13%   | 535.3           | 17,373        | 8.4                            | 5.7  | 4.2  | 18.3  |
| * Fed                     | 2,136                         | 2,493 | 1,271 | 5,900  | 4%                           | 13% | 10% | 10%   | 181.3           | 2,971         | 11.8                           | 13.8 | 7.0  | 32.5  |
| *Discr Mfg                | 4,163                         | 977   | 482   | 5,622  | 13%                          | 25% | 22% | 16%   | 480.0           | 12,095        | 8.7                            | 2.0  | 1.0  | 11.7  |
| *Bank/S&L (incl fin)      | 2,044                         | 369   | 1,931 | 4,344  | 11%                          | 28% | 16% | 15%   | 154.8           | 3,301         | 13.2                           | 2.4  | 12.5 | 28.1  |
| * St&Loc                  | 2,362                         | 576   | 956   | 3,894  | 14%                          | 23% | 21% | 18%   | 354.0           | 14,402        | 6.7                            | 1.6  | 2.7  | 11.0  |
| *Proc Mfrgr (incl mining) | 1,977                         | 157   | 522   | 2,656  | 14%                          | 21% | 16% | 15%   | 466.7           | 8,030         | 4.2                            | 0.3  | 1.1  | 5.7   |
| *Insur (excl fin)         | 1,434                         | 199   | 801   | 2,434  | 14%                          | 25% | 10% | 14%   | 101.4           | 2,082         | 14.1                           | 2.0  | 7.9  | 24.0  |
| *Trans/Util/Telecom       | 1,396                         | 808   | 161   | 2,365  | 14%                          | 17% | 15% | 15%   | 408.3           | 5,230         | 3.4                            | 2.0  | 0.4  | 5.8   |
| *Med/Educ                 | 330                           | 314   | 927   | 1,571  | 12%                          | 15% | 17% | 15%   | 253.3           | 8,701         | 1.3                            | 1.2  | 3.7  | 6.2   |
| Med                       | 254                           | 231   | 833   | 1,318  | 12%                          | 13% | 17% | 15%   | 223.7           | 7,144         | 1.1                            | 1.0  | 3.7  | 5.9   |
| Telecom                   | 950                           | 182   | 65    | 1,197  | 15%                          | 21% | 16% | 16%   | 121.0           | 1,137         | 7.9                            | 1.5  | 0.5  | 9.9   |
| *WDis/RDis                | 534                           | 381   | 169   | 1,084  | 9%                           | 24% | 21% | 17%   | 740.4           | 25,139        | 0.7                            | 0.5  | 0.2  | 1.5   |
| Util                      | 233                           | 469   | 45    | 747    | 11%                          | 14% | 15% | 13%   | 136.4           | 933           | 1.7                            | 3.4  | 0.3  | 5.5   |
| WDis                      | 327                           | 140   | 92    | 559    | 9%                           | 15% | 19% | 12%   | 313.0           | 6,029         | 1.0                            | 0.4  | 0.3  | 1.8   |
| RDis                      | 207                           | 241   | 77    | 525    | 10%                          | 28% | 24% | 21%   | 427.4           | 19,110        | 0.5                            | 0.6  | 0.2  | 1.2   |
| *Svce Industr             | 284                           | 130   | 42    | 456    | 10%                          | 25% | 20% | 16%   | 1,045.6         | 16,944        | 0.3                            | 0.1  | 0.0  | 0.4   |
| Trans                     | 213                           | 157   | 51    | 421    | 13%                          | 19% | 16% | 16%   | 150.9           | 3,160         | 1.4                            | 1.0  | 0.3  | 2.8   |
| Educ                      | 76                            | 83    | 94    | 253    | 13%                          | 18% | 12% | 14%   | 29.6            | 1,557         | 2.6                            | 2.8  | 3.2  | 8.5   |
| CSvcs                     | 133                           | 79    | 25    | 237    | 8%                           | 23% | 25% | 16%   | 198.3           | 9,226         | 0.7                            | 0.4  | 0.1  | 1.2   |
| BSvcs                     | 151                           | 51    | 17    | 219    | 12%                          | 28% | 11% | 16%   | 847.3           | 7,718         | 0.2                            | 0.1  | 0.0  | 0.3   |
| *Agr/Cons (excl mining)   | 104                           | 6     | 0     | 110    | 12%                          | 34% | NA  | 14%   | 313.4           | 8,384         | 0.3                            | 0.0  | 0.0  | 0.4   |
| *EDP Svcs (n/a)           | --                            | --    | --    | --     | --                           | --  | --  | --    | --              | --            | --                             | --   | --   | --    |
| -- TOTAL IND              | 16,764                        | 6,410 | 7,262 | 30,436 | 12%                          | 19% | 16% | 15%   | 4,499.2         | 107,279       | 54.7                           | 16.3 | 31.0 | 102.0 |



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| Industry                  | ---- INPUT 1990 Forecast ---- |       |       |        | ---- INPUT 1990-95 CAGR ---- |     |     |       | 1987            | 1988          | --- 1990 IS Expenditure \$ --- |     |       |       |
|---------------------------|-------------------------------|-------|-------|--------|------------------------------|-----|-----|-------|-----------------|---------------|--------------------------------|-----|-------|-------|
|                           | PFS                           | SI    | SO    | Total  | PFS                          | SI  | SO  | Total | GNP<br>(\$ bil) | Empl<br>(mil) | PFS                            | SI  | SO    | Total |
| Govt. (incl Fed)          | 4,498                         | 3,069 | 2,227 | 9,794  | 10%                          | 15% | 16% | 13%   | 535.3           | 17,373        | 259                            | 177 | 128   | 564   |
| * Fed                     | 2,136                         | 2,493 | 1,271 | 5,900  | 4%                           | 13% | 10% | 10%   | 181.3           | 2,971         | 719                            | 839 | 428   | 1,986 |
| *Discr Mfg                | 4,163                         | 977   | 1,482 | 5,622  | 13%                          | 25% | 22% | 16%   | 480.0           | 12,095        | 344                            | 81  | 40    | 465   |
| *Bank/S&L (incl fin)      | 2,044                         | 369   | 1,931 | 4,344  | 11%                          | 28% | 16% | 15%   | 154.8           | 3,301         | 619                            | 112 | 585   | 1,316 |
| * St&Loc                  | 2,362                         | 576   | 956   | 3,894  | 14%                          | 23% | 21% | 18%   | 354.0           | 14,402        | 164                            | 40  | 66    | 270   |
| *Proc Mfrgr (incl mining) | 1,977                         | 157   | 522   | 2,656  | 14%                          | 21% | 16% | 15%   | 466.7           | 8,030         | 246                            | 20  | 65    | 331   |
| *Insur (excl fin)         | 1,434                         | 199   | 801   | 2,434  | 14%                          | 25% | 10% | 14%   | 101.4           | 2,082         | 689                            | 96  | 385   | 1,169 |
| *Trans/Util/Telecom       | 1,396                         | 808   | 161   | 2,365  | 14%                          | 17% | 15% | 15%   | 408.3           | 5,230         | 267                            | 154 | 31    | 452   |
| *Med/Educ                 | 330                           | 314   | 927   | 1,571  | 12%                          | 15% | 17% | 15%   | 253.3           | 8,701         | 38                             | 36  | 107   | 181   |
| Med                       | 254                           | 231   | 833   | 1,318  | 12%                          | 13% | 17% | 15%   | 223.7           | 7,144         | 36                             | 32  | 117   | 184   |
| Telecom                   | 950                           | 182   | 65    | 1,197  | 15%                          | 21% | 16% | 16%   | 121.0           | 1,137         | 836                            | 160 | 57    | 1,053 |
| *WDis/RDis                | 534                           | 381   | 169   | 1,084  | 9%                           | 24% | 21% | 17%   | 740.4           | 25,139        | 21                             | 15  | 7     | 43    |
| Util                      | 233                           | 469   | 45    | 747    | 11%                          | 14% | 15% | 13%   | 136.4           | 933           | 250                            | 503 | 48    | 801   |
| WDis                      | 327                           | 140   | 92    | 559    | 9%                           | 15% | 19% | 12%   | 313.0           | 6,029         | 54                             | 23  | 15    | 93    |
| RDis                      | 207                           | 241   | 77    | 525    | 10%                          | 28% | 24% | 21%   | 427.4           | 19,110        | 11                             | 13  | 4     | 27    |
| *Svce Industr             | 284                           | 130   | 42    | 456    | 10%                          | 25% | 20% | 16%   | 1,045.6         | 16,944        | 17                             | 8   | 2     | 27    |
| Trans                     | 213                           | 157   | 51    | 421    | 13%                          | 19% | 16% | 16%   | 150.9           | 3,160         | 67                             | 50  | 16    | 133   |
| Educ                      | 76                            | 83    | 94    | 253    | 13%                          | 18% | 12% | 14%   | 29.6            | 1,557         | 49                             | 53  | 60    | 162   |
| CSvcs                     | 133                           | 79    | 25    | 237    | 8%                           | 23% | 25% | 16%   | 198.3           | 9,226         | 14                             | 9   | 3     | 26    |
| BSvcs                     | 151                           | 51    | 17    | 219    | 12%                          | 28% | 11% | 16%   | 847.3           | 7,718         | 20                             | 7   | 2     | 28    |
| *Agr/Cons (excl mining)   | 104                           | 6     | 0     | 110    | 12%                          | 34% | NA  | 14%   | 313.4           | 8,384         | 12                             | 1   | 0     | 13    |
| *EDP Svcs (n/a)           | --                            | --    | --    | --     | --                           | --  | --  | --    | --              | --            | --                             | --  | --    | --    |
| -- TOTAL IND              | 16,764                        | 6,410 | 7,262 | 30,436 | 12%                          | 19% | 16% | 15%   | 4,499.2         | 107,279       | 2,513                          | 698 | 1,349 | 4,560 |



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| Industry                 | ---- INPUT 1990 Forecast ---- |       |       |        | ---- INPUT 1990-95 CAGR ---- |     |     |       | 1987<br>GNP<br>(\$ bil) | 1988<br>Empl<br>(mil) | --- 1990 IS Expenditure \$ --- |      |      |       |
|--------------------------|-------------------------------|-------|-------|--------|------------------------------|-----|-----|-------|-------------------------|-----------------------|--------------------------------|------|------|-------|
|                          | PFS                           | SI    | SO    | Total  | PFS                          | SI  | SO  | Total |                         |                       | per \$,000 of 1987 GNP         | PFS  | SI   | SO    |
| RDIs                     | 207                           | 241   | 77    | 525    | 10%                          | 28% | 24% | 21%   | 427.4                   | 19,110                | 0.5                            | 0.6  | 0.2  | 1.2   |
| * St&Loc                 | 2,362                         | 576   | 956   | 3,894  | 14%                          | 23% | 21% | 18%   | 354.0                   | 14,402                | 6.7                            | 1.6  | 2.7  | 11.0  |
| *WDis/RDis               | 534                           | 381   | 169   | 1,084  | 9%                           | 24% | 21% | 17%   | 740.4                   | 25,139                | 0.7                            | 0.5  | 0.2  | 1.5   |
| BSvcs                    | 151                           | 51    | 17    | 219    | 12%                          | 28% | 11% | 16%   | 847.3                   | 7,718                 | 0.2                            | 0.1  | 0.0  | 0.3   |
| Telecom                  | 950                           | 182   | 65    | 1,197  | 15%                          | 21% | 16% | 16%   | 121.0                   | 1,137                 | 7.9                            | 1.5  | 0.5  | 9.9   |
| *Svce Industr            | 284                           | 130   | 42    | 456    | 10%                          | 25% | 20% | 16%   | 1,045.6                 | 16,944                | 0.3                            | 0.1  | 0.0  | 0.4   |
| *Discr Mfg               | 4,163                         | 977   | 482   | 5,622  | 13%                          | 25% | 22% | 16%   | 480.0                   | 12,095                | 8.7                            | 2.0  | 1.0  | 11.7  |
| CSvcs                    | 133                           | 79    | 25    | 237    | 8%                           | 23% | 25% | 16%   | 198.3                   | 9,226                 | 0.7                            | 0.4  | 0.1  | 1.2   |
| Trans                    | 213                           | 157   | 51    | 421    | 13%                          | 19% | 16% | 16%   | 150.9                   | 3,160                 | 1.4                            | 1.0  | 0.3  | 2.8   |
| Med                      | 254                           | 231   | 833   | 1,318  | 12%                          | 13% | 17% | 15%   | 223.7                   | 7,144                 | 1.1                            | 1.0  | 3.7  | 5.9   |
| *Trans/Util/Telecom      | 1,396                         | 808   | 161   | 2,365  | 14%                          | 17% | 15% | 15%   | 408.3                   | 5,230                 | 3.4                            | 2.0  | 0.4  | 5.8   |
| *Med/Educ                | 330                           | 314   | 927   | 1,571  | 12%                          | 15% | 17% | 15%   | 253.3                   | 8,701                 | 1.3                            | 1.2  | 3.7  | 6.2   |
| *Bank/S&L (incl fin)     | 2,044                         | 369   | 1,931 | 4,344  | 11%                          | 28% | 16% | 15%   | 154.8                   | 3,301                 | 13.2                           | 2.4  | 12.5 | 28.1  |
| *Proc Mfgr (incl mining) | 1,977                         | 157   | 522   | 2,656  | 14%                          | 21% | 16% | 15%   | 466.7                   | 8,030                 | 4.2                            | 0.3  | 1.1  | 5.7   |
| Educ                     | 76                            | 83    | 94    | 253    | 13%                          | 18% | 12% | 14%   | 29.6                    | 1,557                 | 2.6                            | 2.8  | 3.2  | 8.5   |
| *Insur (excl fin)        | 1,434                         | 199   | 801   | 2,434  | 14%                          | 25% | 10% | 14%   | 101.4                   | 2,082                 | 14.1                           | 2.0  | 7.9  | 24.0  |
| *Agr/Cons (excl mining)  | 104                           | 6     | 0     | 110    | 12%                          | 34% | NA  | 14%   | 313.4                   | 8,384                 | 0.3                            | 0.0  | 0.0  | 0.4   |
| Util                     | 233                           | 469   | 45    | 747    | 11%                          | 14% | 15% | 13%   | 136.4                   | 933                   | 1.7                            | 3.4  | 0.3  | 5.5   |
| Govt (incl Fed)          | 4,498                         | 3,069 | 2,227 | 9,794  | 10%                          | 15% | 16% | 13%   | 535.3                   | 17,373                | 8.4                            | 5.7  | 4.2  | 18.3  |
| WDis                     | 327                           | 140   | 92    | 559    | 9%                           | 15% | 19% | 12%   | 313.0                   | 6,029                 | 1.0                            | 0.4  | 0.3  | 1.8   |
| * Fed                    | 2,136                         | 2,493 | 1,271 | 5,900  | 4%                           | 13% | 10% | 10%   | 181.3                   | 2,971                 | 11.8                           | 13.8 | 7.0  | 32.5  |
| *EDP Svcs (n/a)          | --                            | --    | --    | --     | --                           | --  | --  | --    | --                      | --                    | --                             | --   | --   | --    |
| -- TOTAL IND             | 16,764                        | 6,410 | 7,262 | 30,436 | 12%                          | 19% | 16% | 15%   | 4,499.2                 | 107,279               | 54.7                           | 16.3 | 31.0 | 102.0 |



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| Industry                 | ---- INPUT 1990 Forecast ---- |       |       |        | ---- INPUT 1990-95 CAGR ---- |       |       |       | 1987            | 1988          | --- 1990 IS Expenditure \$ --- |         |       |               |
|--------------------------|-------------------------------|-------|-------|--------|------------------------------|-------|-------|-------|-----------------|---------------|--------------------------------|---------|-------|---------------|
|                          | PFS                           | SI    | SO    | Total  | PFS                          | SI    | SO    | Total | GNP<br>(\$ bil) | Empl<br>(mil) | PFS                            | per 000 | 1988  | Empl<br>Total |
| -----                    | -----                         | ----- | ----- | -----  | -----                        | ----- | ----- | ----- | -----           | -----         | -----                          | -----   | ----- | -----         |
| RDIs                     | 207                           | 241   | 77    | 525    | 10%                          | 28%   | 24%   | 21%   | 427.4           | 19,110        | 11                             | 13      | 4     | 27            |
| * St&Loc                 | 2,362                         | 576   | 956   | 3,894  | 14%                          | 23%   | 21%   | 18%   | 354.0           | 14,402        | 164                            | 40      | 66    | 270           |
| *WDis/RDis               | 534                           | 381   | 169   | 1,084  | 9%                           | 24%   | 21%   | 17%   | 740.4           | 25,139        | 21                             | 15      | 7     | 43            |
| BSvcs                    | 151                           | 51    | 17    | 219    | 12%                          | 28%   | 11%   | 16%   | 847.3           | 7,718         | 20                             | 7       | 2     | 28            |
| Telecom                  | 950                           | 182   | 65    | 1,197  | 15%                          | 21%   | 16%   | 16%   | 121.0           | 1,137         | 836                            | 160     | 57    | 1,053         |
| *Svce Industr            | 284                           | 130   | 42    | 456    | 10%                          | 25%   | 20%   | 16%   | 1,045.6         | 16,944        | 17                             | 8       | 2     | 27            |
| *Discr Mfg               | 4,163                         | 977   | 482   | 5,622  | 13%                          | 25%   | 22%   | 16%   | 480.0           | 12,095        | 344                            | 81      | 40    | 465           |
| CSvcs                    | 133                           | 79    | 25    | 237    | 8%                           | 23%   | 25%   | 16%   | 198.3           | 9,226         | 14                             | 9       | 3     | 26            |
| Trans                    | 213                           | 157   | 51    | 421    | 13%                          | 19%   | 16%   | 16%   | 150.9           | 3,160         | 67                             | 50      | 16    | 133           |
| Med                      | 254                           | 231   | 833   | 1,318  | 12%                          | 13%   | 17%   | 15%   | 223.7           | 7,144         | 36                             | 32      | 117   | 184           |
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| *Med/Educ                | 330                           | 314   | 927   | 1,571  | 12%                          | 15%   | 17%   | 15%   | 253.3           | 8,701         | 38                             | 36      | 107   | 181           |
| *Bank/S&L (incl fin)     | 2,044                         | 369   | 1,931 | 4,344  | 11%                          | 28%   | 16%   | 15%   | 154.8           | 3,301         | 619                            | 112     | 585   | 1,316         |
| *Proc Mfrg (incl mining) | 1,977                         | 157   | 522   | 2,656  | 14%                          | 21%   | 16%   | 15%   | 466.7           | 8,030         | 246                            | 20      | 65    | 331           |
| Educ                     | 76                            | 83    | 94    | 253    | 13%                          | 18%   | 12%   | 14%   | 29.6            | 1,557         | 49                             | 53      | 60    | 162           |
| *Insur (excl fin)        | 1,434                         | 199   | 801   | 2,434  | 14%                          | 25%   | 10%   | 14%   | 101.4           | 2,082         | 689                            | 96      | 385   | 1,169         |
| *Agr/Cons (excl mining)  | 104                           | 6     | 0     | 110    | 12%                          | 34%   | NA    | 14%   | 313.4           | 8,384         | 12                             | 1       | 0     | 13            |
| Util                     | 233                           | 469   | 45    | 747    | 11%                          | 14%   | 15%   | 13%   | 136.4           | 953           | 250                            | 503     | 48    | 801           |
| Govt (incl Fed)          | 4,498                         | 3,069 | 2,227 | 9,794  | 10%                          | 15%   | 16%   | 13%   | 535.3           | 17,373        | 259                            | 177     | 128   | 564           |
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| * Fed                    | 2,136                         | 2,493 | 1,271 | 5,900  | 4%                           | 13%   | 10%   | 10%   | 181.3           | 2,971         | 719                            | 839     | 428   | 1,986         |
| *EDP Svcs (n/a)          | --                            | --    | --    | --     | --                           | --    | --    | --    | --              | --            | --                             | --      | --    | --            |
| -----                    | -----                         | ----- | ----- | -----  | -----                        | ----- | ----- | ----- | -----           | -----         | -----                          | -----   | ----- | -----         |
| -- TOTAL IND             | 16,764                        | 6,410 | 7,262 | 30,436 | 12%                          | 19%   | 16%   | 15%   | 4,499.2         | 107,279       | 2,513                          | 698     | 1,349 | 4,560         |



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| Industry                  | ---- INPUT 1990 Forecast ---- |       |       |        | ---- INPUT 1990-95 CAGR ---- |     |     |       | 1987<br>GNP<br>(\$ bil) | 1988<br>Empl<br>(mil) | --- 1990 IS Expenditure \$ --- |      |      |       |
|---------------------------|-------------------------------|-------|-------|--------|------------------------------|-----|-----|-------|-------------------------|-----------------------|--------------------------------|------|------|-------|
|                           | PFS                           | SI    | SO    | Total  | PFS                          | SI  | SO  | Total |                         |                       | PFS                            | SI   | SO   | Total |
| *Svce Industr             | 284                           | 130   | 42    | 456    | 10%                          | 25% | 20% | 16%   | 1,045.6                 | 16,944                | 0.3                            | 0.1  | 0.0  | 0.4   |
| BSvcs                     | 151                           | 51    | 17    | 219    | 12%                          | 28% | 11% | 16%   | 847.3                   | 7,718                 | 0.2                            | 0.1  | 0.0  | 0.3   |
| *WDis/RDis                | 534                           | 381   | 169   | 1,084  | 9%                           | 24% | 21% | 17%   | 740.4                   | 25,139                | 0.7                            | 0.5  | 0.2  | 1.5   |
| Govt (incl Fed)           | 4,498                         | 3,069 | 2,227 | 9,794  | 10%                          | 15% | 16% | 13%   | 535.3                   | 17,373                | 8.4                            | 5.7  | 4.2  | 18.3  |
| *Discr Mfg                | 4,163                         | 977   | 482   | 5,622  | 13%                          | 25% | 22% | 16%   | 480.0                   | 12,095                | 8.7                            | 2.0  | 1.0  | 11.7  |
| *Proc Mfrgr (incl mining) | 1,977                         | 157   | 522   | 2,656  | 14%                          | 21% | 16% | 15%   | 466.7                   | 8,030                 | 4.2                            | 0.3  | 1.1  | 5.7   |
| RDis                      | 207                           | 241   | 77    | 525    | 10%                          | 28% | 24% | 21%   | 427.4                   | 19,110                | 0.5                            | 0.6  | 0.2  | 1.2   |
| *Trans/Util/Telecom       | 1,396                         | 808   | 161   | 2,365  | 14%                          | 17% | 15% | 15%   | 408.3                   | 5,230                 | 3.4                            | 2.0  | 0.4  | 5.8   |
| *St&Loc                   | 2,362                         | 576   | 956   | 3,894  | 14%                          | 23% | 21% | 18%   | 354.0                   | 14,402                | 6.7                            | 1.6  | 2.7  | 11.0  |
| *Agr/Cons (excl mining)   | 104                           | 6     | 0     | 110    | 12%                          | 34% | NA  | 14%   | 313.4                   | 8,384                 | 0.3                            | 0.0  | 0.0  | 0.4   |
| WDis                      | 327                           | 140   | 92    | 559    | 9%                           | 15% | 19% | 12%   | 313.0                   | 6,029                 | 1.0                            | 0.4  | 0.3  | 1.8   |
| *Med/Educ                 | 330                           | 314   | 927   | 1,571  | 12%                          | 15% | 17% | 15%   | 253.3                   | 8,701                 | 1.3                            | 1.2  | 3.7  | 6.2   |
| Med                       | 254                           | 231   | 833   | 1,318  | 12%                          | 13% | 17% | 15%   | 223.7                   | 7,144                 | 1.1                            | 1.0  | 3.7  | 5.9   |
| CSvcs                     | 133                           | 79    | 25    | 237    | 8%                           | 23% | 25% | 16%   | 198.3                   | 9,226                 | 0.7                            | 0.4  | 0.1  | 1.2   |
| *Fed                      | 2,136                         | 2,493 | 1,271 | 5,900  | 4%                           | 13% | 10% | 10%   | 181.3                   | 2,971                 | 11.8                           | 13.8 | 7.0  | 32.5  |
| *Bank/S&L (incl fin)      | 2,044                         | 369   | 1,931 | 4,344  | 11%                          | 28% | 16% | 15%   | 154.8                   | 3,301                 | 13.2                           | 2.4  | 12.5 | 28.1  |
| Trans                     | 213                           | 157   | 51    | 421    | 13%                          | 19% | 16% | 16%   | 150.9                   | 3,160                 | 1.4                            | 1.0  | 0.3  | 2.8   |
| Util                      | 233                           | 469   | 45    | 747    | 11%                          | 14% | 15% | 13%   | 136.4                   | 933                   | 1.7                            | 3.4  | 0.3  | 5.5   |
| Telecom                   | 950                           | 182   | 65    | 1,197  | 15%                          | 21% | 16% | 16%   | 121.0                   | 1,137                 | 7.9                            | 1.5  | 0.5  | 9.9   |
| *Insur (excl fin)         | 1,434                         | 199   | 801   | 2,434  | 14%                          | 25% | 10% | 14%   | 101.4                   | 2,082                 | 14.1                           | 2.0  | 7.9  | 24.0  |
| Educ                      | 76                            | 83    | 94    | 253    | 13%                          | 18% | 12% | 14%   | 29.6                    | 1,557                 | 2.6                            | 2.8  | 3.2  | 8.5   |
| *EDP Svcs (n/a)           | --                            | --    | --    | --     | --                           | --  | --  | --    | --                      | --                    | --                             | --   | --   | --    |
| -- TOTAL IND              | 16,764                        | 6,410 | 7,262 | 30,436 | 12%                          | 19% | 16% | 15%   | 4,499.2                 | 107,279               | 54.7                           | 16.3 | 31.0 | 102.0 |



Allocation of INPUT Professional Services Mkt Fcsts to CI Industry Groups  
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Table sorted by:

| Industry                 | --- INPUT 1990 Forecast --- |       |       |        | --- INPUT 1990-95 CAGR --- |       |       |       | 1987<br>GNP<br>(\$ bil) | 1988<br>Empl<br>(mil) | --- 1990 IS Expenditure \$ --- |           |       |       |
|--------------------------|-----------------------------|-------|-------|--------|----------------------------|-------|-------|-------|-------------------------|-----------------------|--------------------------------|-----------|-------|-------|
|                          | PFS                         | SI    | SO    | Total  | PFS                        | SI    | SO    | Total |                         |                       | per 000                        | 1988 Empl | Total |       |
| -----                    | -----                       | ----- | ----- | -----  | -----                      | ----- | ----- | ----- | -----                   | -----                 | -----                          | -----     | ----- | ----- |
| *Svce Industr            | 284                         | 130   | 42    | 456    | 10%                        | 25%   | 20%   | 16%   | 1,045.6                 | 16,944                | 17                             | 8         | 2     | 27    |
| BSvcs                    | 151                         | 51    | 17    | 219    | 12%                        | 28%   | 11%   | 16%   | 847.3                   | 7,718                 | 20                             | 7         | 2     | 28    |
| *Wdis/Rdis               | 534                         | 381   | 169   | 1,084  | 9%                         | 24%   | 21%   | 17%   | 740.4                   | 25,139                | 21                             | 15        | 7     | 43    |
| Govt (incl Fed)          | 4,498                       | 3,069 | 2,227 | 9,794  | 10%                        | 15%   | 16%   | 13%   | 535.3                   | 17,373                | 259                            | 177       | 128   | 564   |
| *Discr Mfg               | 4,163                       | 977   | 482   | 5,622  | 13%                        | 25%   | 22%   | 16%   | 480.0                   | 12,095                | 344                            | 81        | 40    | 465   |
| *Proc Mfgr (incl mining) | 1,977                       | 157   | 522   | 2,656  | 14%                        | 21%   | 16%   | 15%   | 466.7                   | 8,030                 | 246                            | 20        | 65    | 331   |
| Rdis                     | 207                         | 241   | 77    | 525    | 10%                        | 28%   | 24%   | 21%   | 427.4                   | 19,110                | 11                             | 13        | 4     | 27    |
| *Trans/Util/Telecom      | 1,396                       | 808   | 161   | 2,365  | 14%                        | 17%   | 15%   | 15%   | 408.3                   | 5,230                 | 267                            | 154       | 31    | 452   |
| *St&Loc                  | 2,362                       | 576   | 956   | 3,894  | 14%                        | 23%   | 21%   | 18%   | 354.0                   | 14,402                | 164                            | 40        | 66    | 270   |
| *Agr/Cons (excl mining)  | 104                         | 6     | 0     | 110    | 12%                        | 34%   | NA    | 14%   | 313.4                   | 8,384                 | 12                             | 1         | 0     | 13    |
| Wdis                     | 327                         | 140   | 92    | 559    | 9%                         | 15%   | 19%   | 12%   | 313.0                   | 6,029                 | 54                             | 23        | 15    | 93    |
| *Med/Educ                | 330                         | 314   | 927   | 1,571  | 12%                        | 15%   | 17%   | 15%   | 253.3                   | 8,701                 | 38                             | 36        | 107   | 181   |
| Med                      | 254                         | 231   | 833   | 1,318  | 12%                        | 13%   | 17%   | 15%   | 223.7                   | 7,144                 | 36                             | 32        | 117   | 184   |
| CSvcs                    | 133                         | 79    | 25    | 237    | 8%                         | 23%   | 25%   | 16%   | 198.3                   | 9,226                 | 14                             | 9         | 3     | 26    |
| *Fed                     | 2,136                       | 2,493 | 1,271 | 5,900  | 4%                         | 13%   | 10%   | 10%   | 181.3                   | 2,971                 | 719                            | 839       | 428   | 1,986 |
| *Bank/S&L (incl fin)     | 2,044                       | 369   | 1,931 | 4,344  | 11%                        | 28%   | 16%   | 15%   | 154.8                   | 3,301                 | 619                            | 112       | 585   | 1,316 |
| Trans                    | 213                         | 157   | 51    | 421    | 13%                        | 19%   | 16%   | 16%   | 150.9                   | 3,160                 | 67                             | 50        | 16    | 133   |
| Util                     | 233                         | 469   | 45    | 747    | 11%                        | 14%   | 15%   | 13%   | 136.4                   | 933                   | 250                            | 503       | 48    | 801   |
| Telecom                  | 950                         | 182   | 65    | 1,197  | 15%                        | 21%   | 16%   | 16%   | 121.0                   | 1,137                 | 836                            | 160       | 57    | 1,053 |
| *Insur (excl fin)        | 1,434                       | 199   | 801   | 2,434  | 14%                        | 25%   | 10%   | 14%   | 101.4                   | 2,082                 | 689                            | 96        | 385   | 1,169 |
| Educ                     | 76                          | 83    | 94    | 253    | 13%                        | 18%   | 12%   | 14%   | 29.6                    | 1,557                 | 49                             | 53        | 60    | 162   |
| *EDP Svcs (n/a)          | --                          | --    | --    | --     | --                         | --    | --    | --    | --                      | --                    | --                             | --        | --    | --    |
| -----                    | -----                       | ----- | ----- | -----  | -----                      | ----- | ----- | ----- | -----                   | -----                 | -----                          | -----     | ----- | ----- |
| -- TOTAL IND             | 16,764                      | 6,410 | 7,262 | 30,436 | 12%                        | 19%   | 16%   | 15%   | 4,499.2                 | 107,279               | 2,513                          | 698       | 1,349 | 4,560 |



Allocation of INPUT Professional Services Mkt Fcsts to CI Industry Groups  
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Table sorted by:

| Industry                 | ---- INPUT 1990 Forecast ---- |       |       |        | ---- INPUT 1990-95 CAGR ---- |     |     |       | 1987            | 1988          | --- 1990 IS Expenditure \$ --- |               |          |       |
|--------------------------|-------------------------------|-------|-------|--------|------------------------------|-----|-----|-------|-----------------|---------------|--------------------------------|---------------|----------|-------|
|                          | PFS                           | SI    | SO    | Total  | PFS                          | SI  | SO  | Total | GNP<br>(\$ bil) | Empl<br>(mil) | PFS                            | per \$,000 of | 1987 GNP | Total |
| *WDis/RDis               | 534                           | 381   | 169   | 1,084  | 9%                           | 24% | 21% | 17%   | 740.4           | 25,139        | 0.7                            | 0.5           | 0.2      | 1.5   |
| RDis                     | 207                           | 241   | 77    | 525    | 10%                          | 28% | 24% | 21%   | 427.4           | 19,110        | 0.5                            | 0.6           | 0.2      | 1.2   |
| Govt (incl Fed)          | 4,498                         | 3,069 | 2,227 | 9,794  | 10%                          | 15% | 16% | 13%   | 535.3           | 17,373        | 8.4                            | 5.7           | 4.2      | 18.3  |
| *Svce Industr            | 284                           | 130   | 42    | 456    | 10%                          | 25% | 20% | 16%   | 1,045.6         | 16,944        | 0.3                            | 0.1           | 0.0      | 0.4   |
| * St&Loc                 | 2,362                         | 576   | 956   | 3,894  | 14%                          | 23% | 21% | 18%   | 354.0           | 14,402        | 6.7                            | 1.6           | 2.7      | 11.0  |
| *Discr Mfg               | 4,163                         | 977   | 482   | 5,622  | 13%                          | 25% | 22% | 16%   | 480.0           | 12,095        | 8.7                            | 2.0           | 1.0      | 11.7  |
| CSvcs                    | 133                           | 79    | 25    | 237    | 8%                           | 23% | 25% | 16%   | 198.3           | 9,226         | 0.7                            | 0.4           | 0.1      | 1.2   |
| *Med/Educ                | 330                           | 314   | 927   | 1,571  | 12%                          | 15% | 17% | 15%   | 253.3           | 8,701         | 1.3                            | 1.2           | 3.7      | 6.2   |
| *Agr/Cons (excl mining)  | 104                           | 6     | 0     | 110    | 12%                          | 34% | NA  | 14%   | 313.4           | 8,384         | 0.3                            | 0.0           | 0.0      | 0.4   |
| *Proc Mfgr (incl mining) | 1,977                         | 157   | 522   | 2,656  | 14%                          | 21% | 16% | 15%   | 466.7           | 8,030         | 4.2                            | 0.3           | 1.1      | 5.7   |
| BSvcs                    | 151                           | 51    | 17    | 219    | 12%                          | 28% | 11% | 16%   | 847.3           | 7,718         | 0.2                            | 0.1           | 0.0      | 0.3   |
| Med                      | 254                           | 231   | 833   | 1,318  | 12%                          | 13% | 17% | 15%   | 223.7           | 7,144         | 1.1                            | 1.0           | 3.7      | 5.9   |
| WDis                     | 327                           | 140   | 92    | 559    | 9%                           | 15% | 19% | 12%   | 313.0           | 6,029         | 1.0                            | 0.4           | 0.3      | 1.8   |
| *Trans/Util/Telecom      | 1,396                         | 808   | 161   | 2,365  | 14%                          | 17% | 15% | 15%   | 408.3           | 5,230         | 3.4                            | 2.0           | 0.4      | 5.8   |
| *Bank/S&L (incl fin)     | 2,044                         | 369   | 1,931 | 4,344  | 11%                          | 28% | 16% | 15%   | 154.8           | 3,301         | 13.2                           | 2.4           | 12.5     | 28.1  |
| Trans                    | 213                           | 157   | 51    | 421    | 13%                          | 19% | 16% | 16%   | 150.9           | 3,160         | 1.4                            | 1.0           | 0.3      | 2.8   |
| * Fed                    | 2,136                         | 2,493 | 1,271 | 5,900  | 4%                           | 13% | 10% | 10%   | 181.3           | 2,971         | 11.8                           | 15.8          | 7.0      | 32.5  |
| *Insur (excl fin)        | 1,434                         | 199   | 801   | 2,434  | 14%                          | 25% | 10% | 14%   | 101.4           | 2,082         | 14.1                           | 2.0           | 7.9      | 24.0  |
| Educ                     | 76                            | 83    | 94    | 253    | 13%                          | 18% | 12% | 14%   | 29.6            | 1,557         | 2.6                            | 2.8           | 3.2      | 8.5   |
| Telecom                  | 950                           | 182   | 65    | 1,197  | 15%                          | 21% | 16% | 16%   | 121.0           | 1,137         | 7.9                            | 1.5           | 0.5      | 9.9   |
| Util                     | 233                           | 469   | 45    | 747    | 11%                          | 14% | 15% | 13%   | 136.4           | 933           | 1.7                            | 3.4           | 0.3      | 5.5   |
| *EDP Svcs (n/a)          | --                            | --    | --    | --     | --                           | --  | --  | --    | --              | --            | --                             | --            | --       | --    |
| -- TOTAL IND             | 16,764                        | 6,410 | 7,262 | 30,436 | 12%                          | 19% | 16% | 15%   | 4,499.2         | 107,279       | 54.7                           | 16.3          | 31.0     | 102.0 |



Allocation of INPUT Professional Services Mkt Fcsts to CI Industry Groups  
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Table sorted by:

| Industry                 | ---- INPUT 1990 Forecast ---- |       |       |        | ---- INPUT 1990-95 CAGR ---- |     |     |       | 1987            | 1988          | --- 1990 IS Expenditure \$ --- |         |       |       |
|--------------------------|-------------------------------|-------|-------|--------|------------------------------|-----|-----|-------|-----------------|---------------|--------------------------------|---------|-------|-------|
|                          | PFS                           | SI    | SO    | Total  | PFS                          | SI  | SO  | Total | GNP<br>(\$ bil) | Empl<br>(mil) | PFS                            | per 000 | SO    | Total |
| *MDis/RDis               | 534                           | 381   | 169   | 1,084  | 9%                           | 24% | 21% | 17%   | 740.4           | 25,139        | 21                             | 15      | 7     | 43    |
| RDis                     | 207                           | 241   | 77    | 525    | 10%                          | 28% | 24% | 21%   | 427.4           | 19,110        | 11                             | 13      | 4     | 27    |
| Govt (incl Fed)          | 4,498                         | 3,069 | 2,227 | 9,794  | 10%                          | 15% | 16% | 13%   | 535.3           | 17,373        | 259                            | 177     | 128   | 564   |
| *Svce Industr            | 284                           | 130   | 42    | 456    | 10%                          | 25% | 20% | 16%   | 1,045.6         | 16,944        | 17                             | 8       | 2     | 27    |
| * St&Loc                 | 2,362                         | 576   | 956   | 3,894  | 14%                          | 23% | 21% | 18%   | 354.0           | 14,402        | 164                            | 40      | 66    | 270   |
| *Discr Mfg               | 4,163                         | 977   | 482   | 5,622  | 13%                          | 25% | 22% | 16%   | 480.0           | 12,095        | 344                            | 81      | 40    | 465   |
| CSvcs                    | 133                           | 79    | 25    | 237    | 8%                           | 23% | 25% | 16%   | 198.3           | 9,226         | 14                             | 9       | 3     | 26    |
| *Med/Educ                | 330                           | 314   | 927   | 1,571  | 12%                          | 15% | 17% | 15%   | 253.3           | 8,701         | 38                             | 36      | 107   | 181   |
| *Agr/Cons (excl mining)  | 104                           | 6     | 0     | 110    | 12%                          | 34% | NA  | 14%   | 313.4           | 8,384         | 12                             | 1       | 0     | 13    |
| *Proc Mfrg (incl mining) | 1,977                         | 157   | 522   | 2,656  | 14%                          | 21% | 16% | 15%   | 466.7           | 8,030         | 246                            | 20      | 65    | 331   |
| BSvcs                    | 151                           | 51    | 17    | 219    | 12%                          | 28% | 11% | 16%   | 847.3           | 7,718         | 20                             | 7       | 2     | 28    |
| Med                      | 254                           | 231   | 833   | 1,318  | 12%                          | 13% | 17% | 15%   | 223.7           | 7,144         | 36                             | 32      | 117   | 184   |
| WDis                     | 327                           | 140   | 92    | 559    | 9%                           | 15% | 19% | 12%   | 313.0           | 6,029         | 54                             | 23      | 15    | 93    |
| *Trans/Util/Telecom      | 1,396                         | 808   | 161   | 2,365  | 14%                          | 17% | 15% | 15%   | 408.3           | 5,230         | 267                            | 154     | 31    | 452   |
| *Bank/S&L (incl fin)     | 2,044                         | 369   | 1,931 | 4,344  | 11%                          | 28% | 16% | 15%   | 154.8           | 3,301         | 619                            | 112     | 585   | 1,316 |
| Trans                    | 213                           | 157   | 51    | 421    | 13%                          | 19% | 16% | 16%   | 150.9           | 3,160         | 67                             | 50      | 16    | 133   |
| * Fed                    | 2,136                         | 2,493 | 1,271 | 5,900  | 4%                           | 13% | 10% | 10%   | 181.3           | 2,971         | 719                            | 839     | 428   | 1,986 |
| *Insur (excl fin)        | 1,434                         | 199   | 801   | 2,434  | 14%                          | 25% | 10% | 14%   | 101.4           | 2,082         | 689                            | 96      | 385   | 1,169 |
| Educ                     | 76                            | 83    | 94    | 253    | 13%                          | 18% | 12% | 14%   | 29.6            | 1,357         | 49                             | 53      | 60    | 162   |
| Telecom                  | 950                           | 182   | 65    | 1,197  | 15%                          | 21% | 16% | 16%   | 121.0           | 1,137         | 836                            | 160     | 57    | 1,053 |
| Util                     | 233                           | 469   | 45    | 747    | 11%                          | 14% | 15% | 13%   | 136.4           | 933           | 250                            | 503     | 48    | 801   |
| *EDP Svcs (n/a)          | --                            | --    | --    | --     | --                           | --  | --  | --    | --              | --            | --                             | --      | --    | --    |
| -- TOTAL IND             | 16,764                        | 6,410 | 7,262 | 30,436 | 12%                          | 19% | 16% | 15%   | 4,499.2         | 107,279       | 2,513                          | 698     | 1,349 | 4,560 |



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|---------------------------|-------------------------------|-------|-------|--------|------------------------------|-----|-----|-------|-----------------|---------------|--------------------------------|------|------|-------|
|                           | PFS                           | SI    | SO    | Total  | PFS                          | SI  | SO  | Total | GNP<br>(\$ bil) | Empl<br>(mil) | PFS                            | SI   | SO   | Total |
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| Educ                      | 76                            | 83    | 94    | 253    | 13%                          | 18% | 12% | 14%   | 29.6            | 1,557         | 2.6                            | 2.8  | 3.2  | 8.5   |
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| Trans                     | 213                           | 157   | 51    | 421    | 13%                          | 19% | 16% | 16%   | 150.9           | 3,160         | 1.4                            | 1.0  | 0.3  | 2.8   |
| WDis                      | 327                           | 140   | 92    | 559    | 9%                           | 15% | 19% | 12%   | 313.0           | 6,029         | 1.0                            | 0.4  | 0.3  | 1.8   |
| *WDis/RDis                | 534                           | 381   | 169   | 1,084  | 9%                           | 24% | 21% | 17%   | 740.4           | 25,139        | 0.7                            | 0.5  | 0.2  | 1.5   |
| RDis                      | 207                           | 241   | 77    | 525    | 10%                          | 28% | 24% | 21%   | 427.4           | 19,110        | 0.5                            | 0.6  | 0.2  | 1.2   |
| CSvcs                     | 133                           | 79    | 25    | 237    | 8%                           | 23% | 25% | 16%   | 198.3           | 9,226         | 0.7                            | 0.4  | 0.1  | 1.2   |
| *Svce Industr             | 284                           | 130   | 42    | 456    | 10%                          | 25% | 20% | 16%   | 1,045.6         | 16,944        | 0.3                            | 0.1  | 0.0  | 0.4   |
| *Agr/Cons (excl mining)   | 104                           | 6     | 0     | 110    | 12%                          | 34% | NA  | 14%   | 313.4           | 8,384         | 0.3                            | 0.0  | 0.0  | 0.4   |
| BSvcs                     | 151                           | 51    | 17    | 219    | 12%                          | 28% | 11% | 16%   | 847.3           | 7,718         | 0.2                            | 0.1  | 0.0  | 0.3   |
| *EDP Svcs (n/a)           | --                            | --    | --    | --     | --                           | --  | --  | --    | --              | --            | --                             | --   | --   | --    |
| -- TOTAL IND              | 16,764                        | 6,410 | 7,262 | 30,436 | 12%                          | 19% | 16% | 15%   | 4,499.2         | 107,279       | 54.7                           | 16.3 | 31.0 | 102.0 |



Allocation of INPUT Professional Services Mkt Fcsts to CI Industry Groups  
 File: D:\IBMSOUTH\INDFCSTf.WK3 03-Apr-91 (fixed data version of INDFCST.WK3  
 \* = CI/IBM industry categories 10:55 AM from date/time shown at left)

Table sorted by:

| Industry                 | ---- INPUT 1990 Forecast ---- |       |       |        | ---- INPUT 1990-95 CAGR ---- |     |     |       | 1987            | 1988          | --- 1990 IS Expenditure \$ --- |     |       |       |
|--------------------------|-------------------------------|-------|-------|--------|------------------------------|-----|-----|-------|-----------------|---------------|--------------------------------|-----|-------|-------|
|                          | PFS                           | SI    | SO    | Total  | PFS                          | SI  | SO  | Total | GNP<br>(\$ bil) | Empl<br>(mil) | PFS                            | SI  | SO    | Total |
| * Fed                    | 2,136                         | 2,493 | 1,271 | 5,900  |                              |     |     |       | 181.3           | 2,971         | 719                            | 839 | 428   | 1,986 |
| *Bank/S&L (incl fin)     | 2,044                         | 369   | 1,931 | 4,344  | 11%                          | 13% | 10% | 10%   | 154.8           | 3,301         | 619                            | 112 | 585   | 1,316 |
| *Insur (excl fin)        | 1,434                         | 199   | 801   | 2,434  | 14%                          | 25% | 10% | 14%   | 101.4           | 2,082         | 689                            | 96  | 385   | 1,169 |
| Telecom                  | 950                           | 182   | 65    | 1,197  | 15%                          | 21% | 16% | 16%   | 121.0           | 1,137         | 836                            | 160 | 57    | 1,053 |
| Util                     | 233                           | 469   | 45    | 747    | 11%                          | 14% | 15% | 13%   | 136.4           | 933           | 250                            | 503 | 48    | 801   |
| Govt (incl Fed)          | 4,498                         | 3,069 | 2,227 | 9,794  | 10%                          | 15% | 16% | 13%   | 535.3           | 17,373        | 259                            | 177 | 128   | 564   |
| *Discr Mfg               | 4,163                         | 977   | 482   | 5,622  | 13%                          | 25% | 22% | 16%   | 480.0           | 12,095        | 344                            | 81  | 40    | 465   |
| *Trans/Util/Telecom      | 1,396                         | 808   | 161   | 2,365  | 14%                          | 17% | 15% | 15%   | 408.3           | 5,230         | 267                            | 154 | 31    | 452   |
| *Proc Mfrg (incl mining) | 1,977                         | 157   | 522   | 2,656  | 14%                          | 21% | 16% | 15%   | 466.7           | 8,030         | 246                            | 20  | 65    | 331   |
| * St&Loc                 | 2,362                         | 576   | 956   | 3,894  | 14%                          | 23% | 21% | 18%   | 354.0           | 14,402        | 164                            | 40  | 66    | 270   |
| Med                      | 254                           | 231   | 833   | 1,318  | 12%                          | 13% | 17% | 15%   | 223.7           | 7,144         | 36                             | 32  | 117   | 184   |
| *Med/Educ                | 330                           | 314   | 927   | 1,571  | 12%                          | 15% | 17% | 15%   | 253.3           | 8,701         | 38                             | 36  | 107   | 181   |
| Educ                     | 76                            | 83    | 94    | 253    | 13%                          | 18% | 12% | 14%   | 29.6            | 1,557         | 49                             | 53  | 60    | 162   |
| Trans                    | 213                           | 157   | 51    | 421    | 13%                          | 19% | 16% | 16%   | 150.9           | 3,160         | 67                             | 50  | 16    | 133   |
| WDis                     | 327                           | 140   | 92    | 559    | 9%                           | 15% | 19% | 12%   | 313.0           | 6,029         | 54                             | 23  | 15    | 93    |
| *WDis/RDis               | 534                           | 381   | 169   | 1,084  | 9%                           | 24% | 21% | 17%   | 740.4           | 25,139        | 21                             | 15  | 7     | 43    |
| BSvcs                    | 151                           | 51    | 17    | 219    | 12%                          | 28% | 11% | 16%   | 847.3           | 7,718         | 20                             | 7   | 2     | 28    |
| RDis                     | 207                           | 241   | 77    | 525    | 10%                          | 28% | 24% | 21%   | 427.4           | 19,110        | 11                             | 13  | 4     | 27    |
| *Svce Industr            | 284                           | 130   | 42    | 456    | 10%                          | 25% | 20% | 16%   | 1,045.6         | 16,944        | 17                             | 8   | 2     | 27    |
| CSvcs                    | 133                           | 79    | 25    | 237    | 8%                           | 23% | 25% | 16%   | 198.3           | 9,226         | 14                             | 9   | 3     | 26    |
| *Agr/Cons (excl mining)  | 104                           | 6     | 0     | 110    | 12%                          | 34% | NA  | 14%   | 313.4           | 8,384         | 12                             | 1   | 0     | 13    |
| *EDP Svcs (n/a)          | --                            | --    | --    | --     | --                           | --  | --  | --    | --              | --            | --                             | --  | --    | --    |
| -- TOTAL IND             | 16,764                        | 6,410 | 7,262 | 30,436 | 12%                          | 19% | 16% | 15%   | 4,499.2         | 107,279       | 2,513                          | 698 | 1,349 | 4,560 |



IBM South Bay Market Survey  
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-->Sort by: INPUT Std Ind Seq

South Bay Market Forecast  
04-Apr-91 09:38 AM

| County      | Industry       | No of<br>Firms | -- Employees -- |     | - 1990<br>PFS | SoBay Forecast (\$000)- |        | Total   |
|-------------|----------------|----------------|-----------------|-----|---------------|-------------------------|--------|---------|
|             |                |                | Tot             | Avg |               | S1                      | S0     |         |
| MONTEREY    | Discr Mfg      | 5              | 436             | 87  | 150           | 35                      | 17     | 203     |
|             | Proc Mfg       | 13             | 2,838           | 218 | 699           | 55                      | 184    | 939     |
|             | Trans/Util     | 5              | 231             | 46  | 62            | 36                      | 7      | 104     |
|             | WDis/RDis      | 24             | 2,641           | 110 | 56            | 40                      | 18     | 114     |
|             | Bank/S&L       | 2              | 1,128           | 564 | 698           | 126                     | 660    | 1,484   |
|             | Finan/Insur    | 9              | 257             | 29  | 177           | 25                      | 99     | 300     |
|             | Med/Educ       | 21             | 5,544           | 264 | 210           | 200                     | 591    | 1,001   |
|             | Svce Industr   | 8              | 1,983           | 248 | 33            | 15                      | 5      | 53      |
|             | EDP Svcs       | 5              | 304             | 61  | 0             | 0                       | 0      | 0       |
|             | St&Loc Govt    | 23             | 17,004          | 739 | 2,789         | 680                     | 1,129  | 4,598   |
|             | Agr/Min/Constr | 20             | 2,431           | 122 | 30            | 2                       | 0      | 32      |
|             | -- TOTAL IND   | 135            | 34,799          | 258 | 4,904         | 1,214                   | 2,710  | 8,829   |
| SAN BENITO  | Proc Mfg       | 3              | 570             | 190 | 140           | 11                      | 37     | 189     |
|             | WDis/RDis      | 3              | 154             | 51  | 3             | 2                       | 1      | 7       |
|             | Med/Educ       | 1              | 40              | 40  | 2             | 1                       | 4      | 7       |
|             | Agr/Min/Constr | 1              | 136             | 136 | 2             | 0                       | 0      | 2       |
|             | -- TOTAL IND   | 8              | 900             | 113 | 147           | 15                      | 42     | 204     |
| SANTA CLARA | Discr Mfg      | 387            | 237,632         | 614 | 81,791        | 19,195                  | 9,470  | 110,456 |
|             | Proc Mfg       | 54             | 11,397          | 211 | 2,806         | 223                     | 741    | 3,770   |
|             | Trans/Util     | 38             | 8,844           | 233 | 2,361         | 1,366                   | 272    | 3,999   |
|             | WDis/RDis      | 126            | 18,573          | 147 | 395           | 281                     | 125    | 801     |
|             | Bank/S&L       | 20             | 1,378           | 69  | 853           | 154                     | 806    | 1,813   |
|             | Finan/Insur    | 39             | 1,286           | 33  | 886           | 123                     | 495    | 1,503   |
|             | Med/Educ       | 165            | 74,066          | 449 | 2,809         | 2,673                   | 7,891  | 13,373  |
|             | Svce Industr   | 48             | 38,244          | 797 | 641           | 293                     | 95     | 1,029   |
|             | EDP Svcs       | 153            | 30,963          | 202 | 0             | 0                       | 0      | 0       |
|             | St&Loc Govt    | 50             | 26,000          | 520 | 4,264         | 1,040                   | 1,726  | 7,030   |
|             | Agr/Min/Constr | 35             | 6,478           | 185 | 80            | 5                       | 0      | 85      |
|             | -- TOTAL IND   | 1,115          | 454,861         | 408 | 96,886        | 25,354                  | 21,620 | 143,860 |
| SANTA CRUZ  | Discr Mfg      | 17             | 8,129           | 478 | 2,798         | 657                     | 324    | 3,779   |
|             | Proc Mfg       | 11             | 3,170           | 288 | 780           | 62                      | 206    | 1,049   |
|             | Trans/Util     | 4              | 143             | 36  | 38            | 22                      | 4      | 65      |
|             | WDis/RDis      | 17             | 1,022           | 60  | 22            | 15                      | 7      | 44      |
|             | Bank/S&L       | 1              | 200             | 200 | 124           | 22                      | 117    | 263     |
|             | Finan/Insur    | 2              | 110             | 55  | 76            | 11                      | 42     | 129     |
|             | Med/Educ       | 11             | 6,749           | 614 | 256           | 244                     | 719    | 1,219   |
|             | Svce Industr   | 2              | 130             | 65  | 2             | 1                       | 0      | 3       |
|             | EDP Svcs       | 5              | 1,323           | 265 | 0             | 0                       | 0      | 0       |
|             | St&Loc Govt    | 9              | 2,542           | 282 | 417           | 102                     | 169    | 687     |
|             | Agr/Min/Constr | 10             | 1,606           | 161 | 20            | 1                       | 0      | 21      |
|             | -- TOTAL IND   | 89             | 25,124          | 282 | 4,533         | 1,136                   | 1,589  | 7,258   |
| **TOTAL     | Discr Mfg      | 409            | 246,197         | 602 | 84,739        | 19,887                  | 9,811  | 114,437 |
|             | Proc Mfg       | 81             | 17,975          | 222 | 4,425         | 351                     | 1,168  | 5,945   |
|             | Trans/Util     | 47             | 9,218           | 196 | 2,460         | 1,424                   | 284    | 4,168   |
|             | WDis/RDis      | 170            | 22,390          | 132 | 476           | 339                     | 151    | 965     |
|             | Bank/S&L       | 23             | 2,706           | 118 | 1,676         | 302                     | 1,583  | 3,561   |
|             | Finan/Insur    | 50             | 1,653           | 33  | 1,139         | 158                     | 636    | 1,932   |
|             | Med/Educ       | 198            | 86,401          | 436 | 3,277         | 3,118                   | 9,205  | 15,600  |
|             | Svce Industr   | 58             | 40,357          | 696 | 676           | 310                     | 100    | 1,086   |
|             | EDP Svcs       | 163            | 32,590          | 200 | 0             | 0                       | 0      | 0       |
|             | St&Loc Govt    | 82             | 45,546          | 553 | 7,470         | 1,822                   | 3,003  | 12,315  |
|             | Agr/Min/Constr | 66             | 10,651          | 161 | 132           | 8                       | 0      | 140     |
|             | -- TOTAL IND   | 1,347          | 515,684         | 383 | 106,470       | 27,719                  | 25,961 | 160,151 |



IBM South Bay Market Survey  
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-->Sort by: No of Firms

South Bay Market Forecast  
04-Apr-91 09:38 AM

| County      | Industry       | No of Firms | -- Employees -<br>Tot Avg | - 1990<br>PFS | SoBay Forecast (\$000)-<br>S1 S0 | Total          |
|-------------|----------------|-------------|---------------------------|---------------|----------------------------------|----------------|
| MONTEREY    | Wdis/RDis      | 24          | 2,641 110                 | 56            | 40                               | 18 114         |
|             | St&Loc Govt    | 23          | 17,004 739                | 2,789         | 680                              | 1,129 4,598    |
|             | Med/Educ       | 21          | 5,546 264                 | 210           | 200                              | 591 1,001      |
|             | Agr/Min/Constr | 20          | 2,431 122                 | 30            | 2                                | 0 32           |
|             | Proc Mfgr      | 13          | 2,838 218                 | 699           | 55                               | 184 939        |
|             | Finan/Insur    | 9           | 257 29                    | 177           | 25                               | 99 300         |
|             | Svce Industr   | 8           | 1,983 248                 | 33            | 15                               | 5 53           |
|             | Discr Mfg      | 5           | 436 87                    | 150           | 35                               | 17 203         |
|             | EDP Svcs       | 5           | 304 61                    | 0             | 0                                | 0 0            |
|             | Trans/Util     | 5           | 231 46                    | 62            | 36                               | 7 104          |
|             | Bank/S&L       | 2           | 1,128 564                 | 698           | 126                              | 660 1,484      |
|             | -- TOTAL IND   | 135         | 34,799 258                | 4,904         | 1,214                            | 2,710 8,829    |
| SAN BENITO  | Proc Mfgr      | 3           | 570 190                   | 140           | 11                               | 37 189         |
|             | Wdis/RDis      | 3           | 154 51                    | 3             | 2                                | 1 7            |
|             | Agr/Min/Constr | 1           | 136 136                   | 2             | 0                                | 0 2            |
|             | Med/Educ       | 1           | 40 40                     | 2             | 1                                | 4 7            |
|             | -- TOTAL IND   | 8           | 900 113                   | 147           | 15                               | 42 204         |
| SANTA CLARA | Discr Mfg      | 387         | 237,632 614               | 81,791        | 19,195                           | 9,470 110,456  |
|             | Med/Educ       | 165         | 74,066 449                | 2,809         | 2,673                            | 7,891 13,373   |
|             | EDP Svcs       | 153         | 30,963 202                | 0             | 0                                | 0 0            |
|             | Wdis/RDis      | 126         | 18,573 147                | 395           | 281                              | 125 801        |
|             | Proc Mfgr      | 54          | 11,397 211                | 2,806         | 223                              | 741 3,770      |
|             | St&Loc Govt    | 50          | 26,000 520                | 4,264         | 1,040                            | 1,726 7,030    |
|             | Svce Industr   | 48          | 38,244 797                | 661           | 293                              | 95 1,029       |
|             | Finan/Insur    | 39          | 1,286 33                  | 886           | 123                              | 495 1,503      |
|             | Trans/Util     | 38          | 8,844 233                 | 2,361         | 1,366                            | 272 3,999      |
|             | Agr/Min/Constr | 35          | 6,478 185                 | 80            | 5                                | 0 85           |
|             | Bank/S&L       | 20          | 1,378 69                  | 853           | 154                              | 806 1,813      |
|             | -- TOTAL IND   | 1,115       | 454,861 408               | 96,886        | 25,354                           | 21,620 143,860 |
| SANTA CRUZ  | Discr Mfg      | 17          | 8,129 478                 | 2,798         | 657                              | 324 3,779      |
|             | Wdis/RDis      | 17          | 1,022 60                  | 22            | 15                               | 7 44           |
|             | Med/Educ       | 11          | 6,749 614                 | 256           | 244                              | 719 1,219      |
|             | Proc Mfgr      | 11          | 3,170 288                 | 780           | 62                               | 206 1,049      |
|             | Agr/Min/Constr | 10          | 1,606 161                 | 20            | 1                                | 0 21           |
|             | St&Loc Govt    | 9           | 2,542 282                 | 417           | 102                              | 169 687        |
|             | EDP Svcs       | 5           | 1,323 265                 | 0             | 0                                | 0 0            |
|             | Trans/Util     | 4           | 143 36                    | 38            | 22                               | 4 65           |
|             | Svce Industr   | 2           | 130 65                    | 2             | 1                                | 0 3            |
|             | Finan/Insur    | 2           | 110 55                    | 76            | 11                               | 42 129         |
|             | Bank/S&L       | 1           | 200 200                   | 124           | 22                               | 117 263        |
|             | -- TOTAL IND   | 89          | 25,124 282                | 4,533         | 1,136                            | 1,589 7,258    |
| **TOTAL     | Discr Mfg      | 409         | 246,197 602               | 84,739        | 19,887                           | 9,811 114,437  |
|             | Med/Educ       | 198         | 86,401 436                | 3,277         | 3,118                            | 9,205 15,600   |
|             | Wdis/RDis      | 170         | 22,390 132                | 476           | 339                              | 151 965        |
|             | EDP Svcs       | 163         | 32,590 200                | 0             | 0                                | 0 0            |
|             | St&Loc Govt    | 82          | 45,546 555                | 7,470         | 1,822                            | 3,023 12,315   |
|             | Proc Mfgr      | 81          | 17,975 222                | 4,425         | 351                              | 1,168 5,945    |
|             | Agr/Min/Constr | 66          | 10,651 161                | 132           | 8                                | 0 140          |
|             | Svce Industr   | 58          | 40,357 696                | 676           | 310                              | 100 1,086      |
|             | Finan/Insur    | 50          | 1,653 33                  | 1,139         | 158                              | 636 1,932      |
|             | Trans/Util     | 47          | 9,218 196                 | 2,460         | 1,424                            | 284 4,168      |
|             | Bank/S&L       | 23          | 2,706 118                 | 1,676         | 302                              | 1,583 3,561    |
|             | -- TOTAL IND   | 1,347       | 515,684 383               | 106,470       | 27,719                           | 25,961 160,151 |



IBM South Bay Market Survey  
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--Sort by: No of Empl - Total

South Bay Market Forecast  
04-Apr-91 09:38 AM

| County      | Industry       | No of Firms | -- Employees -- |     | - 1990 PFS | SoBay Forecast (\$000)- |        | Total   |
|-------------|----------------|-------------|-----------------|-----|------------|-------------------------|--------|---------|
|             |                |             | Tot             | Avg |            | S1                      | S0     |         |
| MONTEREY    | St&Loc Govt    | 23          | 17,004          | 739 | 2,789      | 680                     | 1,129  | 4,598   |
|             | Med/Educ       | 21          | 5,546           | 264 | 210        | 200                     | 591    | 1,001   |
|             | Proc Mfgr      | 13          | 2,838           | 218 | 699        | 55                      | 184    | 939     |
|             | Wdis/RDis      | 24          | 2,641           | 110 | 56         | 40                      | 18     | 114     |
|             | Agr/Min/Constr | 20          | 2,431           | 122 | 30         | 2                       | 0      | 32      |
|             | Svce Industr   | 8           | 1,983           | 248 | 33         | 15                      | 5      | 53      |
|             | Bank/S&L       | 2           | 1,128           | 564 | 698        | 126                     | 660    | 1,484   |
|             | Discr Mfg      | 5           | 436             | 87  | 150        | 35                      | 17     | 203     |
|             | EDP Svcs       | 5           | 304             | 61  | 0          | 0                       | 0      | 0       |
|             | Finan/Insur    | 9           | 257             | 29  | 177        | 25                      | 99     | 300     |
|             | Trans/Util     | 5           | 231             | 46  | 62         | 36                      | 7      | 104     |
|             | -- TOTAL IND   | 135         | 34,799          | 258 | 4,904      | 1,214                   | 2,710  | 8,829   |
| SAN BENITO  | Proc Mfgr      | 3           | 570             | 190 | 140        | 11                      | 37     | 189     |
|             | Wdis/RDis      | 3           | 154             | 51  | 3          | 2                       | 1      | 7       |
|             | Agr/Min/Constr | 1           | 136             | 136 | 2          | 0                       | 0      | 2       |
|             | Med/Educ       | 1           | 40              | 40  | 2          | 1                       | 4      | 7       |
|             | -- TOTAL IND   | 8           | 900             | 113 | 147        | 15                      | 42     | 204     |
| SANTA CLARA | Discr Mfg      | 387         | 237,632         | 614 | 81,791     | 19,195                  | 9,470  | 110,456 |
|             | Med/Educ       | 165         | 74,066          | 449 | 2,809      | 2,673                   | 7,891  | 13,373  |
|             | Svce Industr   | 48          | 38,244          | 797 | 641        | 293                     | 95     | 1,029   |
|             | EDP Svcs       | 153         | 30,963          | 202 | 0          | 0                       | 0      | 0       |
|             | St&Loc Govt    | 50          | 26,000          | 520 | 4,264      | 1,040                   | 1,726  | 7,030   |
|             | Wdis/RDis      | 126         | 18,573          | 147 | 395        | 281                     | 125    | 801     |
|             | Proc Mfgr      | 54          | 11,397          | 211 | 2,806      | 223                     | 741    | 3,770   |
|             | Trans/Util     | 38          | 8,844           | 233 | 2,361      | 1,366                   | 272    | 3,999   |
|             | Agr/Min/Constr | 35          | 6,478           | 185 | 80         | 5                       | 0      | 85      |
|             | Bank/S&L       | 20          | 1,378           | 69  | 853        | 154                     | 806    | 1,813   |
|             | Finan/Insur    | 39          | 1,286           | 33  | 886        | 123                     | 495    | 1,503   |
|             | -- TOTAL IND   | 1,115       | 454,861         | 408 | 96,886     | 25,354                  | 21,620 | 143,860 |
| SANTA CRUZ  | Discr Mfg      | 17          | 8,129           | 478 | 2,798      | 657                     | 324    | 3,779   |
|             | Med/Educ       | 11          | 6,749           | 614 | 256        | 244                     | 719    | 1,219   |
|             | Proc Mfgr      | 11          | 3,170           | 288 | 780        | 62                      | 206    | 1,049   |
|             | St&Loc Govt    | 9           | 2,542           | 282 | 417        | 102                     | 169    | 687     |
|             | Agr/Min/Constr | 10          | 1,606           | 161 | 20         | 1                       | 0      | 21      |
|             | EDP Svcs       | 5           | 1,323           | 265 | 0          | 0                       | 0      | 0       |
|             | Wdis/RDis      | 17          | 1,022           | 60  | 22         | 15                      | 7      | 44      |
|             | Bank/S&L       | 1           | 200             | 200 | 124        | 22                      | 117    | 263     |
|             | Trans/Util     | 4           | 143             | 36  | 38         | 22                      | 4      | 65      |
|             | Svce Industr   | 2           | 130             | 65  | 2          | 1                       | 0      | 3       |
|             | Finan/Insur    | 2           | 110             | 55  | 76         | 11                      | 42     | 129     |
|             | -- TOTAL IND   | 89          | 25,124          | 282 | 4,533      | 1,136                   | 1,589  | 7,258   |
| **TOTAL     | Discr Mfg      | 409         | 246,197         | 602 | 84,739     | 19,887                  | 9,811  | 114,437 |
|             | Med/Educ       | 198         | 86,401          | 436 | 3,277      | 3,118                   | 9,205  | 15,600  |
|             | St&Loc Govt    | 82          | 45,546          | 555 | 7,470      | 1,822                   | 3,023  | 12,315  |
|             | Svce Industr   | 58          | 40,357          | 696 | 676        | 310                     | 100    | 1,086   |
|             | EDP Svcs       | 163         | 32,590          | 200 | 0          | 0                       | 0      | 0       |
|             | Wdis/RDis      | 170         | 22,390          | 132 | 476        | 339                     | 151    | 965     |
|             | Proc Mfgr      | 81          | 17,975          | 222 | 4,425      | 351                     | 1,168  | 5,945   |
|             | Agr/Min/Constr | 66          | 10,651          | 161 | 132        | 8                       | 0      | 140     |
|             | Trans/Util     | 47          | 9,218           | 196 | 2,460      | 1,424                   | 284    | 4,168   |
|             | Bank/S&L       | 23          | 2,706           | 118 | 1,676      | 302                     | 1,583  | 3,561   |
|             | Finan/Insur    | 50          | 1,653           | 33  | 1,139      | 158                     | 636    | 1,932   |
|             | -- TOTAL IND   | 1,347       | 515,684         | 383 | 106,470    | 27,719                  | 25,961 | 160,151 |



IBM South Bay Market Survey  
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-->Sort by: No of Empl - Avg

South Bay Market Forecast  
04-Apr-91 09:38 AM

| County      | Industry       | No of Firms | -- Employees - Tot | Avg | - PFS   | SoBay \$1 | Forecast \$0 | (\$000)- Total |
|-------------|----------------|-------------|--------------------|-----|---------|-----------|--------------|----------------|
| MONTEREY    | St&Loc Govt    | 23          | 17,004             | 739 | 2,789   | 680       | 1,129        | 4,598          |
|             | Bank/S&L       | 2           | 1,128              | 564 | 698     | 126       | 660          | 1,484          |
|             | Med/Educ       | 21          | 5,546              | 264 | 210     | 200       | 591          | 1,001          |
|             | Svce Industr   | 8           | 1,983              | 248 | 33      | 15        | 5            | 53             |
|             | Proc Mfgr      | 13          | 2,838              | 218 | 699     | 55        | 184          | 939            |
|             | Agr/Min/Constr | 20          | 2,431              | 122 | 30      | 2         | 0            | 32             |
|             | WDis/RDis      | 24          | 2,641              | 110 | 56      | 40        | 18           | 114            |
|             | Discr Mfg      | 5           | 436                | 87  | 150     | 35        | 17           | 203            |
|             | EDP Svcs       | 5           | 304                | 61  | 0       | 0         | 0            | 0              |
|             | Trans/Util     | 5           | 231                | 46  | 62      | 36        | 7            | 104            |
|             | Finan/Insur    | 9           | 257                | 29  | 177     | 25        | 99           | 300            |
|             | -- TOTAL IND   | 135         | 34,799             | 258 | 4,904   | 1,214     | 2,710        | 8,829          |
| SAN BENITO  | Proc Mfgr      | 3           | 570                | 190 | 140     | 11        | 37           | 189            |
|             | Agr/Min/Constr | 1           | 136                | 136 | 2       | 0         | 0            | 2              |
|             | WDis/RDis      | 3           | 154                | 51  | 3       | 2         | 1            | 7              |
|             | Med/Educ       | 1           | 40                 | 40  | 2       | 1         | 4            | 7              |
|             | -- TOTAL IND   | 8           | 900                | 113 | 147     | 15        | 42           | 204            |
| SANTA CLARA | Svce Industr   | 48          | 38,244             | 797 | 641     | 293       | 95           | 1,029          |
|             | Discr Mfg      | 387         | 237,632            | 614 | 81,791  | 19,195    | 9,470        | 110,456        |
|             | St&Loc Govt    | 50          | 26,000             | 520 | 4,264   | 1,040     | 1,726        | 7,030          |
|             | Med/Educ       | 165         | 74,066             | 449 | 2,809   | 2,673     | 7,891        | 13,373         |
|             | Trans/Util     | 38          | 8,844              | 233 | 2,361   | 1,366     | 272          | 3,999          |
|             | Proc Mfgr      | 54          | 11,397             | 211 | 2,806   | 223       | 741          | 3,770          |
|             | EDP Svcs       | 153         | 30,963             | 202 | 0       | 0         | 0            | 0              |
|             | Agr/Min/Constr | 35          | 6,478              | 185 | 80      | 5         | 0            | 85             |
|             | WDis/RDis      | 126         | 18,573             | 147 | 395     | 281       | 125          | 801            |
|             | Bank/S&L       | 20          | 1,378              | 69  | 853     | 154       | 806          | 1,813          |
|             | Finan/Insur    | 39          | 1,286              | 33  | 886     | 123       | 495          | 1,503          |
|             | -- TOTAL IND   | 1,115       | 454,861            | 408 | 96,886  | 25,354    | 21,620       | 143,860        |
| SANTA CRUZ  | Med/Educ       | 11          | 6,749              | 614 | 256     | 244       | 719          | 1,219          |
|             | Discr Mfg      | 17          | 8,129              | 478 | 2,798   | 657       | 324          | 3,779          |
|             | Proc Mfgr      | 11          | 3,170              | 288 | 780     | 62        | 206          | 1,049          |
|             | St&Loc Govt    | 9           | 2,542              | 282 | 417     | 102       | 169          | 687            |
|             | EDP Svcs       | 5           | 1,323              | 265 | 0       | 0         | 0            | 0              |
|             | Bank/S&L       | 1           | 200                | 200 | 124     | 22        | 117          | 263            |
|             | Agr/Min/Constr | 10          | 1,606              | 161 | 20      | 1         | 0            | 21             |
|             | Svce Industr   | 2           | 130                | 65  | 2       | 1         | 0            | 3              |
|             | WDis/RDis      | 17          | 1,022              | 60  | 22      | 15        | 7            | 44             |
|             | Finan/Insur    | 2           | 110                | 55  | 76      | 11        | 42           | 129            |
|             | Trans/Util     | 4           | 143                | 36  | 38      | 22        | 4            | 65             |
|             | -- TOTAL IND   | 89          | 25,124             | 282 | 4,533   | 1,136     | 1,589        | 7,258          |
| **TOTAL     | Svce Industr   | 58          | 40,357             | 696 | 676     | 310       | 100          | 1,086          |
|             | Discr Mfg      | 409         | 246,197            | 602 | 84,739  | 19,887    | 9,811        | 114,437        |
|             | St&Loc Govt    | 82          | 45,546             | 555 | 7,470   | 1,822     | 3,023        | 12,315         |
|             | Med/Educ       | 198         | 86,401             | 436 | 3,277   | 3,118     | 9,205        | 15,600         |
|             | Proc Mfgr      | 81          | 17,975             | 222 | 4,425   | 351       | 1,168        | 5,945          |
|             | EDP Svcs       | 163         | 32,590             | 200 | 0       | 0         | 0            | 0              |
|             | Trans/Util     | 47          | 9,218              | 196 | 2,460   | 1,424     | 284          | 4,168          |
|             | Agr/Min/Constr | 66          | 10,651             | 161 | 132     | 8         | 0            | 140            |
|             | WDis/RDis      | 170         | 22,390             | 132 | 476     | 339       | 151          | 965            |
|             | Bank/S&L       | 23          | 2,706              | 118 | 1,676   | 302       | 1,583        | 3,561          |
|             | Finan/Insur    | 50          | 1,653              | 33  | 1,139   | 158       | 636          | 1,932          |
|             | -- TOTAL IND   | 1,347       | 515,684            | 383 | 106,470 | 27,719    | 25,961       | 160,151        |



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South Bay Market Forecast  
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| County      | Industry       | No of Firms | -- Employees --<br>Tot Avg | - 1990 PFS | SoBay \$1 | Forecast \$0 | (0000)-<br>Total |
|-------------|----------------|-------------|----------------------------|------------|-----------|--------------|------------------|
| MONTEREY    | St&Loc Govt    | 23          | 17,004 739                 | 2,789      | 680       | 1,129        | 4,598            |
|             | Proc Mfg       | 13          | 2,838 218                  | 699        | 55        | 184          | 939              |
|             | Bank/S&L       | 2           | 1,128 564                  | 698        | 126       | 660          | 1,484            |
|             | Med/Educ       | 21          | 5,546 264                  | 210        | 200       | 591          | 1,001            |
|             | Finan/Insur    | 9           | 257 87                     | 177        | 25        | 99           | 300              |
|             | Discr Mfg      | 5           | 436 87                     | 150        | 35        | 17           | 203              |
|             | Trans/Util     | 5           | 231 46                     | 62         | 36        | 7            | 104              |
|             | Wdis/RDis      | 24          | 2,641 110                  | 56         | 40        | 18           | 114              |
|             | Svce Industr   | 8           | 1,983 248                  | 33         | 15        | 5            | 53               |
|             | Agr/Min/Constr | 20          | 2,431 122                  | 30         | 2         | 0            | 32               |
|             | EDP Svcs       | 5           | 304 61                     | 0          | 0         | 0            | 0                |
|             | -- TOTAL IND   | 135         | 34,799 258                 | 4,904      | 1,214     | 2,710        | 8,829            |
| SAN BENITO  | Proc Mfg       | 3           | 570 190                    | 140        | 11        | 37           | 189              |
|             | Wdis/RDis      | 3           | 154 51                     | 3          | 2         | 1            | 7                |
|             | Agr/Min/Constr | 1           | 136 136                    | 2          | 0         | 0            | 2                |
|             | Med/Educ       | 1           | 40 40                      | 2          | 1         | 4            | 7                |
|             | -- TOTAL IND   | 8           | 900 113                    | 147        | 15        | 42           | 204              |
| SANTA CLARA | Discr Mfg      | 387         | 237,632 614                | 81,791     | 19,195    | 9,470        | 110,456          |
|             | St&Loc Govt    | 50          | 26,000 520                 | 4,264      | 1,040     | 1,726        | 7,030            |
|             | Med/Educ       | 165         | 74,066 449                 | 2,809      | 2,673     | 7,891        | 13,373           |
|             | Proc Mfg       | 54          | 11,397 211                 | 2,806      | 223       | 741          | 3,770            |
|             | Trans/Util     | 38          | 8,844 233                  | 2,361      | 1,366     | 272          | 3,999            |
|             | Finan/Insur    | 39          | 1,286 33                   | 886        | 123       | 495          | 1,503            |
|             | Bank/S&L       | 20          | 1,378 69                   | 853        | 154       | 806          | 1,813            |
|             | Svce Industr   | 48          | 38,244 797                 | 641        | 293       | 95           | 1,029            |
|             | Wdis/RDis      | 126         | 18,573 147                 | 395        | 281       | 125          | 801              |
|             | Agr/Min/Constr | 35          | 6,478 185                  | 80         | 5         | 0            | 85               |
|             | EDP Svcs       | 153         | 30,963 202                 | 0          | 0         | 0            | 0                |
|             | -- TOTAL IND   | 1,115       | 454,861 408                | 96,886     | 25,354    | 21,620       | 143,860          |
| SANTA CRUZ  | Discr Mfg      | 17          | 8,129 478                  | 2,798      | 657       | 324          | 3,779            |
|             | Proc Mfg       | 11          | 3,170 288                  | 780        | 62        | 206          | 1,049            |
|             | St&Loc Govt    | 9           | 2,542 282                  | 417        | 102       | 169          | 687              |
|             | Med/Educ       | 11          | 6,749 614                  | 256        | 244       | 719          | 1,219            |
|             | Bank/S&L       | 1           | 200 200                    | 124        | 22        | 117          | 263              |
|             | Finan/Insur    | 2           | 110 55                     | 76         | 11        | 42           | 129              |
|             | Trans/Util     | 4           | 143 36                     | 38         | 22        | 4            | 65               |
|             | Wdis/RDis      | 17          | 1,022 60                   | 22         | 15        | 7            | 44               |
|             | Agr/Min/Constr | 10          | 1,606 161                  | 20         | 1         | 0            | 21               |
|             | Svce Industr   | 2           | 130 65                     | 2          | 1         | 0            | 3                |
|             | EDP Svcs       | 5           | 1,323 265                  | 0          | 0         | 0            | 0                |
|             | -- TOTAL IND   | 89          | 25,124 282                 | 4,533      | 1,136     | 1,589        | 7,258            |
| **TOTAL     | Discr Mfg      | 409         | 246,197 602                | 84,739     | 19,887    | 9,811        | 114,437          |
|             | St&Loc Govt    | 82          | 45,546 555                 | 7,470      | 1,822     | 3,023        | 12,315           |
|             | Proc Mfg       | 81          | 17,975 222                 | 4,425      | 351       | 1,168        | 5,945            |
|             | Med/Educ       | 198         | 86,401 436                 | 3,277      | 3,118     | 9,205        | 15,600           |
|             | Trans/Util     | 47          | 9,218 196                  | 2,460      | 1,424     | 284          | 4,168            |
|             | Bank/S&L       | 23          | 2,706 118                  | 1,676      | 302       | 1,583        | 3,561            |
|             | Finan/Insur    | 50          | 1,653 33                   | 1,139      | 158       | 636          | 1,932            |
|             | Svce Industr   | 58          | 40,357 696                 | 676        | 310       | 100          | 1,086            |
|             | Wdis/RDis      | 170         | 22,390 132                 | 476        | 339       | 151          | 965              |
|             | Agr/Min/Constr | 66          | 10,651 161                 | 132        | 8         | 0            | 140              |
|             | EDP Svcs       | 163         | 32,590 200                 | 0          | 0         | 0            | 0                |
|             | -- TOTAL IND   | 1,347       | 515,684 383                | 106,470    | 27,719    | 25,961       | 160,151          |



IBM South Bay Market Survey  
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South Bay Market Forecast  
04-Apr-91 09:38 AM

| County      | Industry       | No of Firms | -- Employees -- |     | - 1990 PFS | SoBay Forecast (\$000)- |        |         |
|-------------|----------------|-------------|-----------------|-----|------------|-------------------------|--------|---------|
|             |                |             | Tot             | Avg |            | \$1                     | \$0    | Total   |
| MONTEREY    | St&Loc Govt    | 23          | 17,004          | 739 | 2,789      | 680                     | 1,129  | 4,598   |
|             | Bank/S&L       | 2           | 1,128           | 564 | 698        | 126                     | 660    | 1,484   |
|             | Med/Educ       | 21          | 5,546           | 264 | 210        | 200                     | 591    | 1,001   |
|             | Proc Mfrgr     | 13          | 2,838           | 218 | 699        | 55                      | 184    | 939     |
|             | Finan/Insur    | 9           | 257             | 29  | 177        | 25                      | 99     | 300     |
|             | Discr Mfg      | 5           | 436             | 87  | 150        | 35                      | 17     | 203     |
|             | WDis/RDis      | 24          | 2,641           | 110 | 56         | 40                      | 18     | 114     |
|             | Trans/Util     | 5           | 231             | 46  | 62         | 36                      | 7      | 104     |
|             | Svce Industr   | 8           | 1,983           | 248 | 33         | 15                      | 5      | 53      |
|             | Agr/Min/Constr | 20          | 2,431           | 122 | 30         | 2                       | 0      | 32      |
|             | EDP Svcs       | 5           | 304             | 61  | 0          | 0                       | 0      | 0       |
|             | -- TOTAL IND   | 135         | 34,799          | 258 | 4,904      | 1,214                   | 2,710  | 8,829   |
| SAN BENITO  | Proc Mfrgr     | 3           | 570             | 190 | 140        | 11                      | 37     | 189     |
|             | Med/Educ       | 1           | 40              | 40  | 2          | 1                       | 4      | 7       |
|             | WDis/RDis      | 3           | 154             | 51  | 3          | 2                       | 1      | 7       |
|             | Agr/Min/Constr | 1           | 136             | 136 | 2          | 0                       | 0      | 2       |
|             | -- TOTAL IND   | 8           | 900             | 113 | 147        | 15                      | 42     | 204     |
| SANTA CLARA | Discr Mfg      | 387         | 237,632         | 614 | 81,791     | 19,195                  | 9,470  | 110,456 |
|             | Med/Educ       | 165         | 74,066          | 449 | 2,809      | 2,673                   | 7,891  | 13,373  |
|             | St&Loc Govt    | 50          | 26,000          | 520 | 4,264      | 1,040                   | 1,726  | 7,030   |
|             | Trans/Util     | 38          | 8,844           | 233 | 2,361      | 1,366                   | 272    | 3,999   |
|             | Proc Mfrgr     | 54          | 11,397          | 211 | 2,806      | 223                     | 741    | 3,770   |
|             | Bank/S&L       | 20          | 1,378           | 69  | 853        | 154                     | 806    | 1,813   |
|             | Finan/Insur    | 39          | 1,286           | 33  | 886        | 123                     | 495    | 1,503   |
|             | Svce Industr   | 48          | 38,244          | 797 | 641        | 293                     | 95     | 1,029   |
|             | WDis/RDis      | 126         | 18,573          | 147 | 395        | 281                     | 125    | 801     |
|             | Agr/Min/Constr | 35          | 6,478           | 185 | 80         | 5                       | 0      | 85      |
|             | EDP Svcs       | 153         | 30,963          | 202 | 0          | 0                       | 0      | 0       |
|             | -- TOTAL IND   | 1,115       | 454,861         | 408 | 96,886     | 25,354                  | 21,620 | 143,860 |
| SANTA CRUZ  | Discr Mfg      | 17          | 8,129           | 478 | 2,798      | 657                     | 324    | 3,779   |
|             | Med/Educ       | 11          | 6,749           | 614 | 256        | 244                     | 719    | 1,219   |
|             | Proc Mfrgr     | 11          | 3,170           | 288 | 780        | 62                      | 206    | 1,049   |
|             | St&Loc Govt    | 9           | 2,542           | 282 | 417        | 102                     | 169    | 687     |
|             | Bank/S&L       | 1           | 200             | 200 | 124        | 22                      | 117    | 263     |
|             | Finan/Insur    | 2           | 110             | 55  | 76         | 11                      | 42     | 129     |
|             | Trans/Util     | 4           | 143             | 36  | 38         | 22                      | 4      | 65      |
|             | WDis/RDis      | 17          | 1,022           | 60  | 22         | 15                      | 7      | 44      |
|             | Agr/Min/Constr | 10          | 1,606           | 161 | 20         | 1                       | 0      | 21      |
|             | Svce Industr   | 2           | 130             | 65  | 2          | 1                       | 0      | 3       |
|             | EDP Svcs       | 5           | 1,323           | 265 | 0          | 0                       | 0      | 0       |
|             | -- TOTAL IND   | 89          | 25,124          | 282 | 4,533      | 1,136                   | 1,589  | 7,258   |
| **TOTAL     | Discr Mfg      | 409         | 246,197         | 602 | 84,739     | 19,887                  | 9,811  | 114,437 |
|             | Med/Educ       | 198         | 86,401          | 436 | 3,277      | 3,118                   | 9,205  | 15,600  |
|             | St&Loc Govt    | 82          | 45,546          | 555 | 7,470      | 1,822                   | 3,023  | 12,315  |
|             | Proc Mfrgr     | 81          | 17,975          | 222 | 4,425      | 351                     | 1,168  | 5,945   |
|             | Trans/Util     | 47          | 9,218           | 196 | 2,460      | 1,424                   | 284    | 4,168   |
|             | Bank/S&L       | 23          | 2,706           | 118 | 1,676      | 302                     | 1,583  | 3,561   |
|             | Finan/Insur    | 50          | 1,653           | 33  | 1,139      | 158                     | 636    | 1,932   |
|             | Svce Industr   | 58          | 40,357          | 696 | 676        | 310                     | 100    | 1,086   |
|             | WDis/RDis      | 170         | 22,390          | 132 | 476        | 339                     | 151    | 965     |
|             | Agr/Min/Constr | 66          | 10,651          | 161 | 132        | 8                       | 0      | 140     |
|             | EDP Svcs       | 163         | 32,590          | 200 | 0          | 0                       | 0      | 0       |
|             | -- TOTAL IND   | 1,347       | 515,684         | 383 | 106,470    | 27,719                  | 25,961 | 160,151 |



IBM South Bay Market Survey  
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Computer Intelligence Database Tabulation

04-Apr-91

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\*\*\*\* Based on Revised Totals provided by CI on 3/29 \*\*\*\*

| County      | Industry        | No of Firms | Employees |     | Revenues |     | MIPS     |       |
|-------------|-----------------|-------------|-----------|-----|----------|-----|----------|-------|
|             |                 |             | Tot       | Avg | Tot      | Avg | Tot      | Avg   |
| MONTEREY    | Discr Mfg       | 5           | 436       | 87  | 45       | 9   | 4.3      | 0.9   |
|             | Proc Mfg        | 13          | 2,838     | 218 | 294      | 23  | 35.9     | 2.8   |
|             | Trans/Util      | 5           | 231       | 46  | 100      | 20  | 0.9      | 0.2   |
|             | WDis/RDis       | 24          | 2,641     | 110 | 893      | 37  | 34.4     | 1.4   |
|             | Bank/S&L        | 2           | 1,128     | 564 | 840      | 420 | 42.0     | 21.0  |
|             | Finan/Insur     | 9           | 257       | 29  | 190      | 21  | 3.6      | 0.4   |
|             | Med/Educ        | 21          | 5,546     | 264 | 244      | 12  | 59.0     | 2.8   |
|             | Svce Industr    | 8           | 1,983     | 248 | 88       | 11  | 2.7      | 0.3   |
|             | EDP Svcs        | 5           | 304       | 61  | 14       | 3   | 23.2     | 4.6   |
|             | Govt (incl Fed) | 23          | 17,004    | 739 | 3,177    | 138 | 695.4    | 30.2  |
|             | Agr/Min/Constr  | 20          | 2,431     | 122 | 681      | 34  | 13.5     | 0.7   |
|             | -- TOTAL IND    | 135         | 34,799    | 258 | 6,566    | 49  | 915      | 6.8   |
| SAN BENITO  | Proc Mfg        | 3           | 570       | 190 | 58       | 19  | 4.3      | 1.4   |
|             | WDis/RDis       | 3           | 154       | 51  | 11       | 4   | 0.2      | 0.1   |
|             | Med/Educ        | 1           | 40        | 40  | 2        | 2   | 0.0      | 0.0   |
|             | Agr/Min/Constr  | 1           | 136       | 136 | 38       | 38  | 0.0      | 0.0   |
|             | -- TOTAL IND    | 8           | 900       | 113 | 109      | 14  | 5        | 0.6   |
| SANTA CLARA | Discr Mfg       | 387         | 237,632   | 614 | 22,650   | 59  | 30,282.7 | 78.2  |
|             | Proc Mfg        | 54          | 11,397    | 211 | 1,172    | 22  | 211.5    | 3.9   |
|             | Trans/Util      | 38          | 8,844     | 233 | 3,409    | 90  | 259.1    | 6.8   |
|             | WDis/RDis       | 126         | 18,573    | 147 | 4,294    | 34  | 824.3    | 6.5   |
|             | Bank/S&L        | 20          | 1,378     | 69  | 1,025    | 51  | 47.1     | 2.4   |
|             | Finan/Insur     | 39          | 1,286     | 33  | 954      | 24  | 25.7     | 0.7   |
|             | Med/Educ        | 165         | 74,066    | 449 | 4,981    | 30  | 4,919.0  | 29.8  |
|             | Svce Industr    | 48          | 38,244    | 797 | 1,650    | 34  | 147.6    | 3.1   |
|             | EDP Svcs        | 153         | 30,963    | 202 | 1,786    | 12  | 17,466.7 | 114.2 |
|             | Govt (incl Fed) | 50          | 26,000    | 520 | 3,027    | 61  | 3,019.9  | 60.4  |
|             | Agr/Min/Constr  | 35          | 6,478     | 185 | 960      | 27  | 8.5      | 0.2   |
|             | -- TOTAL IND    | 1,115       | 454,861   | 408 | 45,908   | 41  | 57,212   | 51.3  |
| SANTA CRUZ  | Discr Mfg       | 17          | 8,129     | 478 | 838      | 49  | 190.1    | 11.2  |
|             | Proc Mfg        | 11          | 3,170     | 288 | 325      | 30  | 8.3      | 0.8   |
|             | Trans/Util      | 4           | 143       | 36  | 62       | 16  | 28.8     | 7.2   |
|             | WDis/RDis       | 17          | 1,022     | 60  | 172      | 10  | 7.6      | 0.4   |
|             | Bank/S&L        | 1           | 200       | 200 | 149      | 149 | 4.7      | 4.7   |
|             | Finan/Insur     | 2           | 110       | 55  | 82       | 41  | 0.0      | 0.0   |
|             | Med/Educ        | 11          | 6,749     | 614 | 315      | 29  | 84.3     | 7.7   |
|             | Svce Industr    | 2           | 130       | 65  | 5        | 3   | 0.0      | 0.0   |
|             | EDP Svcs        | 5           | 1,323     | 265 | 58       | 12  | 23.4     | 4.7   |
|             | Govt (incl Fed) | 9           | 2,542     | 282 | 154      | 17  | 39.8     | 4.4   |
|             | Agr/Min/Constr  | 10          | 1,606     | 161 | 416      | 42  | 7.4      | 0.7   |
|             | -- TOTAL IND    | 89          | 25,124    | 282 | 2,576    | 29  | 394      | 4.4   |
| **TOTAL     | Discr Mfg       | 409         | 246,197   | 602 | 23,533   | 58  | 30,477   | 90.3  |
|             | Proc Mfg        | 81          | 17,975    | 222 | 1,849    | 23  | 260      | 8.9   |
|             | Trans/Util      | 47          | 9,218     | 196 | 3,571    | 76  | 289      | 14.2  |
|             | WDis/RDis       | 170         | 22,390    | 132 | 5,370    | 32  | 867      | 8.4   |
|             | Bank/S&L        | 23          | 2,706     | 118 | 2,014    | 88  | 94       | 28.1  |
|             | Finan/Insur     | 50          | 1,653     | 33  | 1,226    | 25  | 29       | 1.1   |
|             | Med/Educ        | 198         | 86,401    | 436 | 5,542    | 28  | 5,062    | 40.3  |
|             | Svce Industr    | 58          | 40,357    | 696 | 1,743    | 30  | 150      | 3.4   |
|             | EDP Svcs        | 163         | 32,390    | 200 | 1,858    | 11  | 17,513   | 123.5 |
|             | Govt (incl Fed) | 82          | 45,546    | 555 | 6,358    | 78  | 3,765    | 95.0  |
|             | Agr/Min/Constr  | 66          | 10,651    | 161 | 2,095    | 32  | 29       | 1.6   |
|             | -- TOTAL IND    | 1,347       | 515,684   | 383 | 55,159   | 41  | 58,526   | 43.4  |



IBM South Bay Market Survey  
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-->Sort by: No of Firms

Computer Intelligence Database Tabulation  
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\*\*\*\* Based on Revised Totals provided by CI on 3/29 \*\*\*\*

| County      | Industry        | No of Firms | Employees |     | Revenues |     | MPS      |       |
|-------------|-----------------|-------------|-----------|-----|----------|-----|----------|-------|
|             |                 |             | Tot       | Avg | Tot      | Avg | Tot      | Avg   |
| MONTEREY    | Wdis/RDis       | 24          | 2,641     | 110 | 893      | 37  | 34.4     | 1.4   |
|             | Govt (incl Fed) | 23          | 17,004    | 739 | 3,177    | 138 | 695.4    | 30.2  |
|             | Med/Educ        | 21          | 5,546     | 264 | 244      | 12  | 59.0     | 2.8   |
|             | Agr/Min/Constr  | 20          | 2,431     | 122 | 681      | 34  | 13.5     | 0.7   |
|             | Proc Mfg        | 13          | 2,838     | 218 | 294      | 23  | 35.9     | 2.8   |
|             | Finan/Insur     | 9           | 257       | 29  | 190      | 21  | 3.6      | 0.4   |
|             | Svce Industr    | 8           | 1,983     | 248 | 88       | 11  | 2.7      | 0.3   |
|             | Discr Mfg       | 5           | 436       | 87  | 45       | 9   | 4.3      | 0.9   |
|             | EDP Svcs        | 5           | 304       | 61  | 14       | 3   | 23.2     | 4.6   |
|             | Trans/Util      | 5           | 231       | 46  | 100      | 20  | 0.9      | 0.2   |
|             | Bank/S&L        | 2           | 1,128     | 564 | 840      | 420 | 42.0     | 21.0  |
|             | -- TOTAL IND    | 135         | 34,799    | 258 | 6,566    | 49  | 915      | 6.8   |
| SAN BENITO  | Proc Mfg        | 3           | 570       | 190 | 58       | 19  | 4.3      | 1.4   |
|             | Wdis/RDis       | 3           | 154       | 51  | 11       | 4   | 0.2      | 0.1   |
|             | Agr/Min/Constr  | 1           | 136       | 136 | 38       | 38  | 0.0      | 0.0   |
|             | Med/Educ        | 1           | 40        | 40  | 2        | 2   | 0.0      | 0.0   |
|             | -- TOTAL IND    | 8           | 900       | 113 | 109      | 14  | 5        | 0.6   |
| SANTA CLARA | Discr Mfg       | 387         | 237,632   | 614 | 22,650   | 59  | 30,282.7 | 78.2  |
|             | Med/Educ        | 165         | 74,066    | 449 | 4,981    | 30  | 4,919.0  | 29.8  |
|             | EDP Svcs        | 153         | 30,963    | 202 | 1,786    | 12  | 17,466.7 | 114.2 |
|             | Wdis/RDis       | 126         | 18,573    | 147 | 4,294    | 34  | 824.3    | 6.5   |
|             | Proc Mfg        | 54          | 11,397    | 211 | 1,172    | 22  | 211.5    | 3.9   |
|             | Govt (incl Fed) | 50          | 26,000    | 520 | 3,027    | 61  | 3,019.9  | 60.4  |
|             | Svce Industr    | 48          | 38,244    | 797 | 1,650    | 34  | 147.6    | 3.1   |
|             | Finan/Insur     | 39          | 1,286     | 33  | 954      | 24  | 25.7     | 0.7   |
|             | Trans/Util      | 38          | 8,844     | 233 | 3,409    | 90  | 259.1    | 6.8   |
|             | Agr/Min/Constr  | 35          | 6,478     | 185 | 960      | 27  | 8.5      | 0.2   |
|             | Bank/S&L        | 20          | 1,378     | 69  | 1,025    | 51  | 47.1     | 2.4   |
|             | -- TOTAL IND    | 1,115       | 454,861   | 408 | 45,908   | 41  | 57,212   | 51.3  |
| SANTA CRUZ  | Discr Mfg       | 17          | 8,129     | 478 | 838      | 49  | 190.1    | 11.2  |
|             | Wdis/RDis       | 17          | 1,022     | 60  | 172      | 10  | 7.6      | 0.4   |
|             | Med/Educ        | 11          | 6,749     | 614 | 315      | 29  | 84.3     | 7.7   |
|             | Proc Mfg        | 11          | 3,170     | 288 | 325      | 30  | 8.3      | 0.8   |
|             | Agr/Min/Constr  | 10          | 1,606     | 161 | 416      | 42  | 7.4      | 0.7   |
|             | Govt (incl Fed) | 9           | 2,542     | 282 | 154      | 17  | 39.8     | 4.4   |
|             | EDP Svcs        | 5           | 1,323     | 265 | 58       | 12  | 23.4     | 4.7   |
|             | Trans/Util      | 4           | 143       | 36  | 62       | 16  | 28.8     | 7.2   |
|             | Svce Industr    | 2           | 130       | 65  | 5        | 3   | 0.0      | 0.0   |
|             | Finan/Insur     | 2           | 110       | 55  | 82       | 41  | 0.0      | 0.0   |
|             | Bank/S&L        | 1           | 200       | 200 | 149      | 149 | 4.7      | 4.7   |
|             | -- TOTAL IND    | 89          | 25,124    | 282 | 2,576    | 29  | 394      | 4.4   |
| **TOTAL     | Discr Mfg       | 409         | 246,197   | 602 | 23,533   | 58  | 30,477   | 90.3  |
|             | Med/Educ        | 198         | 86,401    | 436 | 5,562    | 28  | 5,062    | 40.3  |
|             | Wdis/RDis       | 170         | 22,590    | 132 | 5,370    | 32  | 867      | 8.4   |
|             | EDP Svcs        | 163         | 32,590    | 200 | 1,858    | 11  | 17,513   | 123.5 |
|             | Govt (incl Fed) | 82          | 45,546    | 555 | 6,358    | 78  | 3,755    | 95.0  |
|             | Proc Mfg        | 81          | 17,975    | 222 | 1,849    | 23  | 260      | 8.9   |
|             | Agr/Min/Constr  | 66          | 10,651    | 161 | 2,095    | 32  | 29       | 1.6   |
|             | Svce Industr    | 58          | 40,357    | 696 | 1,743    | 30  | 150      | 3.4   |
|             | Finan/Insur     | 50          | 1,653     | 33  | 1,226    | 25  | 29       | 1.1   |
|             | Trans/Util      | 47          | 2,218     | 196 | 76       | 571 | 289      | 10.2  |
|             | Bank/S&L        | 23          | 2,706     | 118 | 2,014    | 88  | 94       | 28.1  |
|             | -- TOTAL IND    | 1,347       | 515,684   | 383 | 55,159   | 41  | 58,526   | 43.4  |



IBM South Bay Market Survey  
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-->Sort by: No of Empl - Total

Computer Intelligence Database Tabulation

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\*\*\*\* Based on Revised Totals provided by CI on 3/29 \*\*\*\*

| County      | Industry        | No of Firms | -- Employees -- |     | -- Revenues -- |     | -- WIPS -- |       |
|-------------|-----------------|-------------|-----------------|-----|----------------|-----|------------|-------|
|             |                 |             | Tot             | Avg | Tot            | Avg | Tot        | Avg   |
| MONTEREY    | Govt (incl Fed) | 23          | 17,004          | 739 | 3,177          | 138 | 695.4      | 30.2  |
|             | Med/Educ        | 21          | 5,546           | 264 | 244            | 12  | 59.0       | 2.8   |
|             | Proc Mfg        | 13          | 2,838           | 218 | 294            | 23  | 35.9       | 2.8   |
|             | WDis/RDis       | 24          | 2,641           | 110 | 893            | 37  | 34.4       | 1.4   |
|             | Agr/Min/Constr  | 20          | 2,431           | 122 | 681            | 34  | 13.5       | 0.7   |
|             | Svce Industr    | 8           | 1,983           | 248 | 88             | 11  | 2.7        | 0.3   |
|             | Bank/S&L        | 2           | 1,128           | 564 | 840            | 420 | 42.0       | 21.0  |
|             | Discr Mfg       | 5           | 436             | 87  | 45             | 9   | 4.3        | 0.9   |
|             | EDP Svcs        | 5           | 304             | 61  | 14             | 3   | 23.2       | 4.6   |
|             | Finan/Insur     | 9           | 257             | 29  | 190            | 21  | 3.6        | 0.4   |
|             | Trans/Util      | 5           | 231             | 46  | 100            | 20  | 0.9        | 0.2   |
|             | -- TOTAL IND    | 135         | 34,799          | 258 | 6,566          | 49  | 915        | 6.8   |
| SAN BENITO  | Proc Mfg        | 3           | 570             | 190 | 58             | 19  | 4.3        | 1.4   |
|             | WDis/RDis       | 3           | 154             | 51  | 11             | 4   | 0.2        | 0.1   |
|             | Agr/Min/Constr  | 1           | 136             | 136 | 38             | 38  | 0.0        | 0.0   |
|             | Med/Educ        | 1           | 40              | 40  | 2              | 2   | 0.0        | 0.0   |
|             | -- TOTAL IND    | 8           | 900             | 113 | 109            | 14  | 5          | 0.6   |
| SANTA CLARA | Discr Mfg       | 387         | 237,632         | 614 | 22,650         | 59  | 30,282.7   | 78.2  |
|             | Med/Educ        | 165         | 74,066          | 449 | 4,981          | 30  | 4,919.0    | 29.8  |
|             | Svce Industr    | 48          | 38,244          | 797 | 1,650          | 34  | 147.6      | 3.1   |
|             | EDP Svcs        | 153         | 30,963          | 202 | 1,786          | 12  | 17,466.7   | 114.2 |
|             | Govt (incl Fed) | 50          | 26,000          | 520 | 3,027          | 61  | 3,019.9    | 60.4  |
|             | WDis/RDis       | 126         | 18,573          | 147 | 4,294          | 34  | 824.3      | 6.5   |
|             | Proc Mfg        | 54          | 11,397          | 211 | 1,172          | 22  | 211.5      | 3.9   |
|             | Trans/Util      | 38          | 8,844           | 233 | 3,409          | 90  | 259.1      | 6.8   |
|             | Agr/Min/Constr  | 35          | 6,478           | 185 | 960            | 27  | 8.5        | 0.2   |
|             | Bank/S&L        | 20          | 1,378           | 69  | 1,025          | 51  | 47.1       | 2.4   |
|             | Finan/Insur     | 39          | 1,286           | 33  | 954            | 24  | 25.7       | 0.7   |
|             | -- TOTAL IND    | 1,115       | 454,861         | 408 | 45,908         | 41  | 57,212     | 51.3  |
| SANTA CRUZ  | Discr Mfg       | 17          | 8,129           | 478 | 838            | 49  | 190.1      | 11.2  |
|             | Med/Educ        | 11          | 6,749           | 614 | 315            | 29  | 84.3       | 7.7   |
|             | Proc Mfg        | 11          | 3,170           | 288 | 325            | 30  | 8.3        | 0.8   |
|             | Govt (incl Fed) | 9           | 2,542           | 282 | 154            | 17  | 39.8       | 4.4   |
|             | Agr/Min/Constr  | 10          | 1,606           | 161 | 416            | 42  | 7.4        | 0.7   |
|             | EDP Svcs        | 5           | 1,323           | 265 | 58             | 12  | 23.4       | 4.7   |
|             | WDis/RDis       | 17          | 1,022           | 60  | 172            | 10  | 7.6        | 0.4   |
|             | Bank/S&L        | 1           | 200             | 200 | 149            | 149 | 4.7        | 4.7   |
|             | Trans/Util      | 4           | 143             | 36  | 62             | 16  | 28.8       | 7.2   |
|             | Svce Industr    | 2           | 130             | 65  | 5              | 3   | 0.0        | 0.0   |
|             | Finan/Insur     | 2           | 110             | 55  | 82             | 41  | 0.0        | 0.0   |
|             | -- TOTAL IND    | 89          | 25,124          | 282 | 2,576          | 29  | 394        | 4.4   |
| **TOTAL     | Discr Mfg       | 409         | 246,197         | 602 | 23,533         | 58  | 30,477     | 90.3  |
|             | Med/Educ        | 198         | 86,401          | 436 | 5,542          | 28  | 5,062      | 40.3  |
|             | Govt (incl Fed) | 82          | 45,546          | 555 | 6,358          | 78  | 3,755      | 95.0  |
|             | Svce Industr    | 58          | 40,357          | 696 | 1,743          | 30  | 150        | 3.4   |
|             | EDP Svcs        | 163         | 32,590          | 200 | 1,858          | 11  | 17,513     | 123.5 |
|             | WDis/RDis       | 170         | 22,390          | 132 | 5,370          | 32  | 867        | 8.4   |
|             | Proc Mfg        | 81          | 17,975          | 222 | 1,849          | 23  | 260        | 8.9   |
|             | Agr/Min/Constr  | 66          | 10,651          | 161 | 2,095          | 32  | 29         | 1.6   |
|             | Trans/Util      | 47          | 9,218           | 196 | 3,571          | 76  | 289        | 14.2  |
|             | Bank/S&L        | 23          | 2,706           | 118 | 2,014          | 88  | 9          | 25.1  |
|             | Finan/Insur     | 50          | 1,653           | 33  | 1,226          | 25  | 29         | 1.1   |
|             | -- TOTAL IND    | 1,347       | 515,684         | 383 | 55,159         | 41  | 58,526     | 43.4  |



IBM South Bay Market Survey  
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-->Sort by: No of Empl - Avg

Computer Intelligence Database Tabulation  
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\*\*\* Based on Revised Totals provided by CI on 3/29 \*\*\*

| County      | Industry        | No of Firms | Employees |     | Revenues |     | MPS      |       |
|-------------|-----------------|-------------|-----------|-----|----------|-----|----------|-------|
|             |                 |             | Tot       | Avg | Tot      | Avg | Tot      | Avg   |
| MONTEREY    | Govt (incl Fed) | 23          | 17,004    | 739 | 3,177    | 138 | 695.4    | 30.2  |
|             | Bank/S&L        | 2           | 1,128     | 564 | 840      | 420 | 42.0     | 21.0  |
|             | Med/Educ        | 21          | 5,546     | 264 | 244      | 12  | 59.0     | 2.8   |
|             | Svce Industr    | 8           | 1,983     | 248 | 88       | 11  | 2.7      | 0.3   |
|             | Proc Mfgr       | 13          | 2,838     | 218 | 294      | 23  | 35.9     | 2.8   |
|             | Agr/Min/Constr  | 20          | 2,431     | 122 | 681      | 34  | 13.5     | 0.7   |
|             | WDis/RDis       | 24          | 2,641     | 110 | 893      | 37  | 34.4     | 1.4   |
|             | Discr Mfg       | 5           | 436       | 87  | 45       | 9   | 4.3      | 0.9   |
|             | EDP Svcs        | 5           | 304       | 61  | 14       | 3   | 23.2     | 4.6   |
|             | Trans/Util      | 5           | 231       | 46  | 100      | 20  | 0.9      | 0.2   |
|             | Finan/Insur     | 9           | 257       | 29  | 190      | 21  | 3.6      | 0.4   |
|             | -- TOTAL IND    | 135         | 34,799    | 258 | 6,566    | 49  | 915      | 6.8   |
| SAN BENITO  | Proc Mfgr       | 3           | 570       | 190 | 58       | 19  | 4.3      | 1.4   |
|             | Agr/Min/Constr  | 1           | 136       | 136 | 38       | 38  | 0.0      | 0.0   |
|             | WDis/RDis       | 3           | 154       | 51  | 11       | 4   | 0.2      | 0.1   |
|             | Med/Educ        | 1           | 40        | 40  | 2        | 2   | 0.0      | 0.0   |
|             | -- TOTAL IND    | 8           | 900       | 113 | 109      | 14  | 5        | 0.6   |
| SANTA CLARA | Svce Industr    | 48          | 38,244    | 797 | 1,650    | 34  | 147.6    | 3.1   |
|             | Discr Mfg       | 387         | 237,632   | 614 | 22,650   | 59  | 30,282.7 | 78.2  |
|             | Govt (incl Fed) | 50          | 26,000    | 520 | 3,027    | 61  | 3,019.9  | 60.4  |
|             | Med/Educ        | 165         | 74,066    | 449 | 4,981    | 30  | 4,919.0  | 29.8  |
|             | Trans/Util      | 38          | 8,844     | 233 | 3,409    | 90  | 259.1    | 6.8   |
|             | Proc Mfgr       | 54          | 11,397    | 211 | 1,172    | 22  | 211.5    | 3.9   |
|             | EDP Svcs        | 153         | 30,963    | 202 | 1,786    | 12  | 17,466.7 | 114.2 |
|             | Agr/Min/Constr  | 35          | 6,478     | 185 | 960      | 27  | 8.5      | 0.2   |
|             | WDis/RDis       | 126         | 18,573    | 147 | 4,294    | 34  | 824.3    | 6.5   |
|             | Bank/S&L        | 20          | 1,378     | 69  | 1,025    | 51  | 47.1     | 2.4   |
|             | Finan/Insur     | 39          | 1,286     | 33  | 954      | 24  | 25.7     | 0.7   |
|             | -- TOTAL IND    | 1,115       | 454,861   | 408 | 45,908   | 41  | 57,212   | 51.3  |
| SANTA CRUZ  | Med/Educ        | 11          | 6,749     | 614 | 315      | 29  | 84.3     | 7.7   |
|             | Discr Mfg       | 17          | 8,129     | 478 | 838      | 49  | 190.1    | 11.2  |
|             | Proc Mfgr       | 11          | 3,170     | 288 | 325      | 30  | 8.3      | 0.8   |
|             | Govt (incl Fed) | 9           | 2,542     | 282 | 154      | 17  | 39.8     | 4.4   |
|             | EDP Svcs        | 5           | 1,323     | 265 | 58       | 12  | 23.4     | 4.7   |
|             | Bank/S&L        | 1           | 200       | 200 | 149      | 149 | 4.7      | 4.7   |
|             | Agr/Min/Constr  | 10          | 1,606     | 161 | 416      | 42  | 7.4      | 0.7   |
|             | Svce Industr    | 2           | 130       | 65  | 5        | 3   | 0.0      | 0.0   |
|             | WDis/RDis       | 17          | 1,022     | 60  | 172      | 10  | 7.6      | 0.4   |
|             | Finan/Insur     | 2           | 110       | 55  | 82       | 41  | 0.0      | 0.0   |
|             | Trans/Util      | 4           | 143       | 36  | 62       | 16  | 28.8     | 7.2   |
|             | -- TOTAL IND    | 89          | 25,124    | 282 | 2,576    | 29  | 394      | 4.4   |
| **TOTAL     | Svce Industr    | 58          | 40,357    | 696 | 1,743    | 30  | 150      | 3.4   |
|             | Discr Mfg       | 409         | 246,197   | 602 | 23,533   | 58  | 30,477   | 90.3  |
|             | Govt (incl Fed) | 82          | 45,546    | 555 | 6,358    | 78  | 3,755    | 95.0  |
|             | Med/Educ        | 198         | 86,401    | 436 | 5,562    | 28  | 5,062    | 40.3  |
|             | Proc Mfgr       | 81          | 17,975    | 222 | 1,849    | 23  | 260      | 8.9   |
|             | EDP Svcs        | 163         | 32,590    | 200 | 1,858    | 11  | 17,513   | 123.5 |
|             | Trans/Util      | 47          | 9,218     | 196 | 3,571    | 76  | 289      | 14.2  |
|             | Agr/Min/Constr  | 66          | 10,651    | 161 | 2,095    | 32  | 29       | 1.6   |
|             | WDis/RDis       | 170         | 22,390    | 132 | 5,370    | 32  | 867      | 8.4   |
|             | Bank/S&L        | 23          | 2,706     | 118 | 2,014    | 88  | 94       | 28.1  |
|             | Finan/Insur     | 50          | 1,653     | 33  | 1,226    | 25  | 29       | 1.1   |
|             | -- TOTAL IND    | 1,347       | 515,684   | 383 | 55,159   | 41  | 58,526   | 43.4  |



IBM South Bay Market Survey  
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-->Sort by: MIPS - Total

Computer Intelligence Database Tabulation

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\*\*\*\* Based on Revised Totals provided by CI on 3/29 \*\*\*\*

| County      | Industry        | No of Firms | -- Employees -- |     | -- Revenues -- |     | --- MIPS --- |       |
|-------------|-----------------|-------------|-----------------|-----|----------------|-----|--------------|-------|
|             |                 |             | Tot             | Avg | Tot            | Avg | Tot          | Avg   |
| MONTEREY    | Govt (incl Fed) | 23          | 17,004          | 739 | 3,177          | 138 | 695.4        | 30.2  |
|             | Med/Educ        | 21          | 5,546           | 264 | 244            | 12  | 59.0         | 2.8   |
|             | Bank/S&L        | 2           | 1,128           | 564 | 840            | 420 | 42.0         | 21.0  |
|             | Proc Mfrgr      | 13          | 2,838           | 218 | 294            | 23  | 35.9         | 2.8   |
|             | WDis/RDis       | 24          | 2,641           | 110 | 893            | 37  | 34.4         | 1.4   |
|             | EDP Svcs        | 5           | 304             | 61  | 14             | 3   | 23.2         | 4.6   |
|             | Agr/Min/Constr  | 20          | 2,431           | 122 | 681            | 34  | 13.5         | 0.7   |
|             | Discr Mfg       | 5           | 436             | 87  | 45             | 9   | 4.3          | 0.9   |
|             | Finan/Insur     | 9           | 257             | 29  | 190            | 21  | 3.6          | 0.4   |
|             | Svce Industr    | 8           | 1,983           | 248 | 88             | 11  | 2.7          | 0.3   |
|             | Trans/Util      | 5           | 231             | 46  | 100            | 20  | 0.9          | 0.2   |
|             | -- TOTAL IND    | 135         | 34,799          | 258 | 6,566          | 49  | 915          | 6.8   |
| SAN BENITO  | Proc Mfrgr      | 3           | 570             | 190 | 58             | 19  | 4.3          | 1.4   |
|             | WDis/RDis       | 3           | 154             | 51  | 11             | 4   | 0.2          | 0.1   |
|             | Agr/Min/Constr  | 1           | 136             | 136 | 38             | 38  | 0.0          | 0.0   |
|             | Med/Educ        | 1           | 40              | 40  | 2              | 2   | 0.0          | 0.0   |
|             | -- TOTAL IND    | 8           | 900             | 113 | 109            | 14  | 5            | 0.6   |
| SANTA CLARA | Discr Mfg       | 387         | 237,632         | 614 | 22,650         | 59  | 30,282.7     | 78.2  |
|             | EDP Svcs        | 153         | 30,963          | 202 | 1,786          | 12  | 17,466.7     | 114.2 |
|             | Med/Educ        | 165         | 74,066          | 449 | 4,981          | 30  | 4,919.0      | 29.8  |
|             | Govt (incl Fed) | 50          | 26,000          | 520 | 3,027          | 61  | 3,019.9      | 60.4  |
|             | WDis/RDis       | 126         | 18,573          | 147 | 4,294          | 34  | 824.3        | 6.5   |
|             | Trans/Util      | 38          | 8,844           | 233 | 3,409          | 90  | 259.1        | 6.8   |
|             | Proc Mfrgr      | 54          | 11,397          | 211 | 1,172          | 22  | 211.5        | 3.9   |
|             | Svce Industr    | 48          | 38,244          | 797 | 1,650          | 34  | 147.6        | 3.1   |
|             | Bank/S&L        | 20          | 1,378           | 69  | 1,025          | 51  | 47.1         | 2.4   |
|             | Finan/Insur     | 39          | 1,286           | 33  | 954            | 24  | 25.7         | 0.7   |
|             | Agr/Min/Constr  | 35          | 6,478           | 185 | 960            | 27  | 8.5          | 0.2   |
|             | -- TOTAL IND    | 1,115       | 454,861         | 408 | 45,908         | 41  | 57,212       | 51.3  |
| SANTA CRUZ  | Discr Mfg       | 17          | 8,129           | 478 | 838            | 49  | 190.1        | 11.2  |
|             | Med/Educ        | 11          | 6,749           | 614 | 315            | 29  | 84.3         | 7.7   |
|             | Govt (incl Fed) | 9           | 2,542           | 282 | 154            | 17  | 39.8         | 4.4   |
|             | Trans/Util      | 4           | 143             | 36  | 62             | 16  | 28.8         | 7.2   |
|             | EDP Svcs        | 5           | 1,323           | 265 | 58             | 12  | 23.4         | 4.7   |
|             | Proc Mfrgr      | 11          | 3,170           | 288 | 325            | 30  | 8.3          | 0.8   |
|             | WDis/RDis       | 17          | 1,022           | 60  | 172            | 10  | 7.6          | 0.4   |
|             | Agr/Min/Constr  | 10          | 1,606           | 161 | 416            | 42  | 7.4          | 0.7   |
|             | Bank/S&L        | 1           | 200             | 200 | 149            | 149 | 4.7          | 4.7   |
|             | Svce Industr    | 2           | 130             | 65  | 5              | 3   | 0.0          | 0.0   |
|             | Finan/Insur     | 2           | 110             | 55  | 82             | 41  | 0.0          | 0.0   |
|             | -- TOTAL IND    | 89          | 25,124          | 282 | 2,576          | 29  | 394          | 4.4   |
| **TOTAL     | Discr Mfg       | 409         | 246,197         | 602 | 23,533         | 58  | 30,477       | 90.3  |
|             | EDP Svcs        | 163         | 32,590          | 200 | 1,858          | 11  | 17,513       | 123.5 |
|             | Med/Educ        | 198         | 86,401          | 436 | 5,542          | 28  | 5,062        | 40.3  |
|             | Govt (incl Fed) | 82          | 45,546          | 555 | 6,358          | 78  | 3,755        | 95.0  |
|             | WDis/RDis       | 170         | 22,390          | 132 | 5,370          | 32  | 867          | 8.4   |
|             | Trans/Util      | 47          | 9,218           | 196 | 3,571          | 76  | 289          | 14.2  |
|             | Proc Mfrgr      | 81          | 17,975          | 222 | 1,849          | 23  | 260          | 8.9   |
|             | Svce Industr    | 58          | 40,357          | 696 | 1,743          | 30  | 150          | 3.4   |
|             | Bank/S&L        | 23          | 2,706           | 118 | 2,014          | 88  | 94           | 28.1  |
|             | Agr/Min/Constr  | 66          | 10,651          | 161 | 2,095          | 32  | 29           | 1.6   |
|             | Finan/Insur     | 50          | 1,653           | 33  | 1,226          | 25  | 29           | 1.1   |
|             | -- TOTAL IND    | 1,347       | 515,684         | 383 | 55,159         | 41  | 58,526       | 43.4  |



IBM South Bay Market Survey  
File: D:\IBMSOUTH\CLISMR3F.WK3  
-->Sort by: MIPS - Avg

Computer Intelligence Database Tabulation  
04-Apr-91 02:01 PM

\*\*\*\* Based on Revised Totals provided by CI on 3/29 \*\*\*\*

| County      | Industry        | No of Firms | Employees |     | Revenues |     | MIPS     |       |
|-------------|-----------------|-------------|-----------|-----|----------|-----|----------|-------|
|             |                 |             | Tot       | Avg | Tot      | Avg | Tot      | Avg   |
| MONTEREY    | Govt (incl Fed) | 23          | 17,004    | 739 | 3,177    | 138 | 695.4    | 30.2  |
|             | Bank/S&L        | 2           | 1,128     | 564 | 840      | 420 | 42.0     | 21.0  |
|             | EDP Svcs        | 5           | 304       | 61  | 14       | 3   | 23.2     | 4.6   |
|             | Med/Educ        | 21          | 5,546     | 264 | 244      | 12  | 59.0     | 2.8   |
|             | Proc Mfgr       | 13          | 2,838     | 218 | 294      | 23  | 35.9     | 2.8   |
|             | WDis/RDis       | 24          | 2,641     | 110 | 893      | 37  | 34.4     | 1.4   |
|             | Discr Mfg       | 5           | 436       | 87  | 45       | 9   | 4.3      | 0.9   |
|             | Agr/Min/Constr  | 20          | 2,431     | 122 | 681      | 34  | 13.5     | 0.7   |
|             | Finan/Insur     | 9           | 257       | 29  | 190      | 21  | 3.6      | 0.4   |
|             | Svce Industr    | 8           | 1,983     | 248 | 88       | 11  | 2.7      | 0.3   |
|             | Trans/Util      | 5           | 231       | 46  | 100      | 20  | 0.9      | 0.2   |
|             | -- TOTAL IND    | 135         | 34,799    | 258 | 6,566    | 49  | 915      | 6.8   |
| SAN BENITO  | Proc Mfgr       | 3           | 570       | 190 | 58       | 19  | 4.3      | 1.4   |
|             | WDis/RDis       | 3           | 154       | 51  | 11       | 4   | 0.2      | 0.1   |
|             | Agr/Min/Constr  | 1           | 136       | 136 | 38       | 38  | 0.0      | 0.0   |
|             | Med/Educ        | 1           | 40        | 40  | 2        | 2   | 0.0      | 0.0   |
|             | -- TOTAL IND    | 8           | 900       | 113 | 109      | 14  | 5        | 0.6   |
| SANTA CLARA | EDP Svcs        | 153         | 30,963    | 202 | 1,786    | 12  | 17,466.7 | 114.2 |
|             | Discr Mfg       | 387         | 237,632   | 614 | 22,650   | 59  | 30,282.7 | 78.2  |
|             | Govt (incl Fed) | 50          | 26,000    | 520 | 3,027    | 61  | 3,019.9  | 60.4  |
|             | Med/Educ        | 165         | 74,066    | 449 | 4,981    | 30  | 4,919.0  | 29.8  |
|             | Trans/Util      | 38          | 8,844     | 233 | 3,409    | 90  | 259.1    | 6.8   |
|             | WDis/RDis       | 126         | 18,573    | 147 | 4,294    | 34  | 824.3    | 6.5   |
|             | Proc Mfgr       | 54          | 11,397    | 211 | 1,172    | 22  | 211.5    | 3.9   |
|             | Svce Industr    | 48          | 38,244    | 797 | 1,650    | 34  | 147.6    | 3.1   |
|             | Bank/S&L        | 20          | 1,378     | 69  | 1,025    | 51  | 47.1     | 2.4   |
|             | Finan/Insur     | 39          | 1,286     | 33  | 954      | 24  | 25.7     | 0.7   |
|             | Agr/Min/Constr  | 35          | 6,478     | 185 | 960      | 27  | 8.5      | 0.2   |
|             | -- TOTAL IND    | 1,115       | 454,861   | 408 | 45,908   | 41  | 57,212   | 51.3  |
| SANTA CRUZ  | Discr Mfg       | 17          | 8,129     | 478 | 838      | 49  | 190.1    | 11.2  |
|             | Med/Educ        | 11          | 6,749     | 614 | 315      | 29  | 84.3     | 7.7   |
|             | Trans/Util      | 4           | 143       | 36  | 62       | 16  | 28.8     | 7.2   |
|             | EDP Svcs        | 5           | 1,323     | 265 | 58       | 12  | 23.4     | 4.7   |
|             | Bank/S&L        | 1           | 200       | 200 | 149      | 149 | 4.7      | 4.7   |
|             | Govt (incl Fed) | 9           | 2,542     | 282 | 154      | 17  | 39.8     | 4.4   |
|             | Proc Mfgr       | 11          | 3,170     | 288 | 325      | 30  | 8.3      | 0.8   |
|             | Agr/Min/Constr  | 10          | 1,606     | 161 | 416      | 42  | 7.4      | 0.7   |
|             | WDis/RDis       | 17          | 1,022     | 60  | 172      | 10  | 7.6      | 0.4   |
|             | Svce Industr    | 2           | 130       | 65  | 5        | 3   | 0.0      | 0.0   |
|             | Finan/Insur     | 2           | 110       | 55  | 82       | 41  | 0.0      | 0.0   |
|             | -- TOTAL IND    | 89          | 25,124    | 282 | 2,576    | 29  | 394      | 4.4   |
| **TOTAL     | EDP Svcs        | 163         | 32,590    | 200 | 1,858    | 11  | 17,513   | 123.5 |
|             | Govt (incl Fed) | 82          | 45,546    | 555 | 6,358    | 78  | 3,785    | 95.0  |
|             | Discr Mfg       | 409         | 246,197   | 602 | 23,533   | 58  | 30,477   | 90.3  |
|             | Med/Educ        | 198         | 86,401    | 436 | 5,542    | 28  | 5,062    | 40.3  |
|             | Bank/S&L        | 23          | 2,706     | 118 | 2,014    | 88  | 94       | 28.1  |
|             | Trans/Util      | 47          | 9,218     | 196 | 3,571    | 76  | 289      | 14.2  |
|             | Proc Mfgr       | 81          | 17,975    | 222 | 1,849    | 23  | 260      | 8.9   |
|             | WDis/RDis       | 170         | 22,390    | 132 | 5,370    | 32  | 867      | 8.4   |
|             | Svce Industr    | 58          | 40,357    | 696 | 1,743    | 30  | 150      | 3.4   |
|             | Agr/Min/Constr  | 66          | 10,651    | 161 | 2,095    | 32  | 29       | 1.6   |
|             | Finan/Insur     | 50          | 1,653     | 33  | 1,226    | 25  | 29       | 1.1   |
|             | -- TOTAL IND    | 1,347       | 515,684   | 383 | 55,159   | 41  | 58,526   | 43.4  |



[In billions of current dollars]

| INDUSTRY                                     | Industry<br>INPUT | Codes<br>SIC | Ind GNP<br>1987 | Empl<br>(1988) |
|----------------------------------------------|-------------------|--------------|-----------------|----------------|
| Gross National Product                       | GNP               | --           | 4,526.7         |                |
| Domestic Industries (GDP)                    | GDP               | --           | 4,497.2         |                |
| Private Industries                           | GDP-Priv          | --           | 3,970.0         |                |
| Agriculture, forestry, and fisheries         | Misc              | 0xxx         | 96.9            | 3,259          |
| Farms                                        |                   | 0xxx         | 75.9            |                |
| Mining                                       | PMan              | 1xxx         | 85.4            | 721            |
| Construction                                 | Misc              | 1xxx         | 218.5           | 5,125          |
| Manufacturing                                | --                | --           | 853.6           |                |
| Durable goods                                | --                | --           | 480.0           |                |
| Lumber and wood products                     | PMan              | 24xx         | 27.7            | 765            |
| Furniture and fixtures                       | DMan              | 25xx         | 15.0            | 530            |
| Stone, clay, and glass products              | PMan              | 32xx         | 27.5            | 600            |
| Primary metal industries                     | PMan              | 33xx         | 36.4            | 774            |
| Fabricated metal products                    | DMan              | 34xx         | 60.3            | 1,431          |
| Machinery, except electrical                 | DMan              | 35xx         | 81.2            | 2,082          |
| Electric and electronic equipment            | DMan              | 36xx         | 85.0            | 2,070          |
| Motor vehicles and equipment                 | DMan              | 37xx         | 49.9            | 857            |
| Other transportation equipment               | DMan              | 37xx         | 56.0            | 1,193          |
| Instruments and related products             | DMan              | 38xx         | 27.0            | 749            |
| Other Misc (\$ calculated from total)        | DMan              | 39xx         | 21.6            | 386            |
| Nondurable goods                             | --                | --           | 373.6           |                |
| Food and kindred products                    | PMan              | 20xx         | 76.0            | 1,636          |
| Tobacco manufactures                         | PMan              | 21xx         | 15.5            | 56             |
| Textile mill products                        | PMan              | 22xx         | 20.0            | 729            |
| Apparel and other textile products           | DMan              | 23xx         | 22.5            | 1,092          |
| Paper and allied products                    | PMan              | 26xx         | 39.5            | 693            |
| Printing and publishing                      | DMan              | 27xx         | 58.2            | 1,561          |
| Chemicals and allied products                | PMan              | 28xx         | 77.1            | 1,065          |
| Petroleum and coal products                  | PMan              | 29xx         | 33.6            | 162            |
| Rubber and misc. plastic products            | PMan              | 30xx         | 30.0            | 829            |
| Leather and leather products                 | DMan              | 31xx         | 9.3             | 144            |
| Transportation and public utilities          | --                | --           | 408.2           |                |
| Transportation                               | --                | --           | 150.8           |                |
| Railroad transportation                      | Trans             | 40xx         | 19.6            | 299            |
| Local and interurban passenger transit       | Trans             | 41xx         | 8.1             | 313            |
| Trucking and warehousing                     | Trans             | 42xx         | 64.2            | 1,569          |
| Water transportation                         | Trans             | 44xx         | 7.5             |                |
| Transportation by air                        | Trans             | 45xx         | 34.2            | 644            |
| Pipelines, except natural gas                | Trans             | 46xx         | 5.3             | 19             |
| Transportation services                      | Trans             | 47xx         | 12.0            | 316            |
| Communications                               | --                | --           | 121.0           |                |
| Telephone and telegraph                      | Tele              | 48xx         | 108.3           | 898            |
| Radio and television broadcasting            | Tele              | 48xx         | 12.7            | 239            |
| Electric, gas, and sanitary services         | Util              | 49xx         | 136.4           | 933            |
| Wholesale trade                              | Wdis              | 5xxx         | 313.0           | 6,029          |
| Retail trade                                 | Rdis              | 5xxx         | 427.4           | 19,110         |
| Finance, insurance, and real estate          | --                | --           | 775.4           |                |
| Banking                                      | Bank              | 60xx         | 84.9            | 1,738          |
| Credit agencies other than banks             | Bank              | 61xx         | 17.0            | 898            |
| Security and commodity brokers, and service  | Bank              | 62xx         | 36.7            | 449            |
| Insurance carriers                           | Insu              | 63xx         | 72.7            | 1,442          |
| Insurance agents and brokers, and service    | Insu              | 64xx         | 28.7            | 640            |
| Real estate                                  | BSvcs             | 65xx         | 519.3           | 1,295          |
| Holding and other investment companies       | Bank              | 67xx         | 16.2            | 216            |
| Services                                     | --                | --           | 793.5           |                |
| Hotels and other lodging places              | CSvcs             | 70xx         | 35.8            | 1,550          |
| Personal services                            | CSvcs             | 72xx         | 34.4            | 1,175          |
| Business services                            | BSvcs             | 73xx         | 179.3           | 5,571          |
| Auto repair, services, and garages           | CSvcs             | 75xx         | 38.9            | 837            |
| Motion pictures                              | CSvcs             | 78xx         | 10.7            | 241            |
| Amusement and recreation services            | CSvcs             | 79xx         | 24.0            | 918            |
| Health services                              | Medi              | 80xx         | 223.7           | 7,144          |
| Legal services                               | BSvcs             | 81xx         | 62.3            | 852            |
| Educational services                         | Educ              | 82xx         | 29.6            | 1,557          |
| Social services and membership organizations | CSvcs             | 83xx         | 45.3            | 3,342          |
| Miscellaneous professional services          | BSvcs             | 8xxx         | 86.4            |                |
| Private households                           | CSvcs             | 88xx         | 9.2             | 1,163          |



Stat Abstr Table No 691 for GNP by Industry; 651 and 662 for Employment by Industry  
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[In billions of current dollars]

| INDUSTRY                              | Industry Codes<br>INPUT SIC | Ind GNP<br>1987 | Empl<br>(1988) |
|---------------------------------------|-----------------------------|-----------------|----------------|
| Government and government enterprises | -- --                       | 535.3           |                |
| Federal                               | Fede 9xxx                   | 181.3           | 2,971          |
| State and local                       | St&Loc 9xxx                 | 354.0           | 14,402         |
| Statistical discrepancy               | Discreap --                 | (8.1)           |                |
| Rest of the world                     |                             | 29.5            |                |

- Represents zero. NS Not significant. I Includes items no

NOTE: source data in 1990 Stat Abstract converted to spreadsheet via:  
 - scanning into Macintosh and conversion to MSWord for DOS;  
 - editing in MSW to clean up scanning errors  
 - editing in MSW to isolate separate columns of titles/numbers  
 (using replace to put " on both sides of all "t and "p),  
 - FileImportNumbers into Lotus (produces label-formatted numbers)  
 - conversion of label-formatted numbers via @VALUE

MSW file: D:\IBMSOUTH\IND-GNP2.DOC

# Aggregated GNP and Employment Totals by INPUT Industry Categories

| INPUT<br>Ind Cat | GNP<br>(1987) | Empl<br>(1988) |
|------------------|---------------|----------------|
| Bank             | 154.8         | 3,301          |
| BSvcs            | 847.3         | 7,718          |
| CSvcs            | 198.3         | 9,226          |
| DMan             | 480.0         | 12,095         |
| Educ             | 29.6          | 1,557          |
| Fede             | 181.3         | 2,971          |
| Insu             | 101.4         | 2,082          |
| Medi             | 223.7         | 7,144          |
| Misc             | 313.4         | 8,384          |
| PMan             | 466.7         | 8,030          |
| RDis             | 427.4         | 19,110         |
| St&Loc           | 354.0         | 14,402         |
| Tele             | 121.0         | 1,137          |
| Trans            | 150.9         | 3,160          |
| Util             | 136.4         | 933            |
| WDis             | 313.0         | 6,029          |
| -----<br>TOTAL   | 4,499.2       | 107,279        |
| Discreap         | (8.1)         | 0 (private HH) |
| Calc GDP         | 4,507.3       | 107,279        |



## PRESENTATION OUTLINE - PENINSULA MARKET STUDY YWIBS

*The following is the proposed structure of the presentation for IBM San Jose on the YWIBS project. Where possible, I have filled in data that might be included in specific slides. IBM San Jose has been promised a presentation and a written deliverable in bulletized format. My suggestion is that we prepare the presentation in foil format, providing a backup sheet to provide more detailed explanation where appropriate.*

*I have attempted to number the foils in this initial draft. Undoubtedly there will be insertions and deletions as we develop the final deliverable.*

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FOIL #1

### PENINSULA TRADING AREA MARKET ANALYSIS

*Prepared by INPUT*

*for*

#### IBM SAN JOSE TRADING AREA

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FOIL #2

### STUDY OBJECTIVES

- Provide an estimate of market sizes for key service sectors
- Estimate growth rates for key service segments
- Prepare a local competitive analysis
  - Identify key local competitors
  - Analyze their local capabilities
  - Analyze customer receptivity to IBM



FOIL #3

**SCOPE - GEOGRAPHIC/INDUSTRY****GEOGRAPHIC**

- Santa Clara, Monterey, Santa Cruz, San Benito counties

**INDUSTRY SECTORS***Emphasis On:*

- Discrete Manufacturing
- State and Local Government
- Education
- Health Care

*All Sectors (except Federal) included for complete perspective*

FOIL #4

**SCOPE - MARKET SEGMENTS**

| MARKETS               | MARKET SEGMENTS                                                                                                                     |
|-----------------------|-------------------------------------------------------------------------------------------------------------------------------------|
| Professional Services | Applications Development<br>Project Management<br>Systems Programming<br>Software Installation<br>Education<br>Executive Consulting |
| Systems Integration   | Applications Integration<br>Network Integration<br>Infrastructure Integration                                                       |
| Systems Operations    | Platform Operations<br>Applications Management                                                                                      |

*NETWORK SERVICES*



---

FOIL #5**METHODOLOGY - OVERVIEW**

- Meetings with IBM project management executive
  - Intelligence gathering
  - Identification of critical interviews
  - Preliminary identification of competition
- Interview design - for user surveys, vendor assessments
- Conducted user interviews
- Tabulated user interview data

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FOIL #6**FORECAST METHODOLOGY - OVERVIEW  
DATA SOURCES**

- INPUT 1990 U.S. market forecast
  - By vertical industry
  - By delivery mode
- Commerce Department industry employment statistics
- Computer Intelligence (CI) database
  - Sites within Peninsula market area
  - Employment by industry - Peninsula, Nationwide



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FOIL #7**FORECAST METHODOLOGY - OVERVIEW  
PROCESS**

- Converted INPUT U.S. market forecast to a per-employee basis
  - By vertical industry
  - By delivery mode
- Preliminary Peninsula forecast based on CI employment data
- Adjusted estimates for local market factors
  - Utilizing user survey results
  - Other INPUT research, industry expertise

---

FOIL #8**FORECAST METHODOLOGY - OVERVIEW  
POTENTIAL ISSUES**

- Use of CI database requires significant cleansing
  - Industry classifications vs. INPUT/Dept of Commerce
  - Depth of market coverage - 90% of all relevant sites.
  - Single company multiple sites - double counting
  - Large corporations with sites inside and outside the area
- CI Employment vs. total industry employment
- All issues satisfactorily resolved

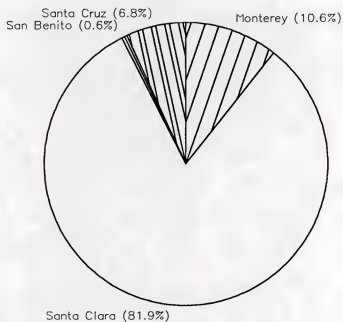


FOIL #9

**DEMOGRAPHICS - PENINSULA TRADING AREA**

**FIRMS BY COUNTY**

TOTAL FIRMS = 1232





FOIL #10

**DEMOGRAPHICS - PENINSULA TRADING AREA**

Employees by Industrial Sector

(Horizontal bar chart showing employees by industry sector for the entire trading area, key areas highlighted, also averages per firm as a label.)

**INDUSTRY SECTOR AVG./FIRM TOTAL EMPLOYEES**

|                                 |      |         |
|---------------------------------|------|---------|
| Discrete Manufacturing          | 707  | 246,000 |
| Medical/Education               | 483  | 86,000  |
| Service Industries              | 708  | 40,000  |
| EDP Services                    | 206  | 33,000  |
| Federal Government              | 1337 | 28,000  |
| Wholesale/Retail Distribution   | 132  | 22,000  |
| Process Manufacturing           | 230  | 18,000  |
| State & Local Government        | 486  | 17,000  |
| Agriculture/Mining/Construction | 161  | 11,000  |
| Transportation/Utilities        | 196  | 9,000   |
| Banking/Savings & Loan          | 118  | 3,000   |
| Finance & Insurance             | 33   | 2,000   |

*NATIONAL*  
*AVGS.*

FOIL #11

*Demographics - Comments*

**EMPLOYEES - COMMENTS**

- Total area business environment has extremes
  - A few very large firms
  - Lot's of Mom's and Pops
- Lack of significant firms in financial sectors
  - Headquartered out of the area
  - Dominated by LA and San Francisco companies
- Manufacturing highly specialized - high tech

*COMBINE WITH #12*



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FOIL #12**MIPS - COMMENTS**

- Heavy concentration of workstation MIPS
- Dominated by manufacturing (SUN, others)
- Disproportionantly high ratio of minis to mainframes
- Very heterogeneous environment

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FOIL #13**PLATFORM CONSIDERATIONS**

*(Bullet slide and/or possible graph expressing platform demography of the Peninsula trading area.)*

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FOIL #14**DEMOGRAPHICS - SUMMARY AND CONCLUSIONS**

*(Bullet slide presenting INPUT's summary and conclusions regarding the population demographics with emphasis on local area variations from norm.)*

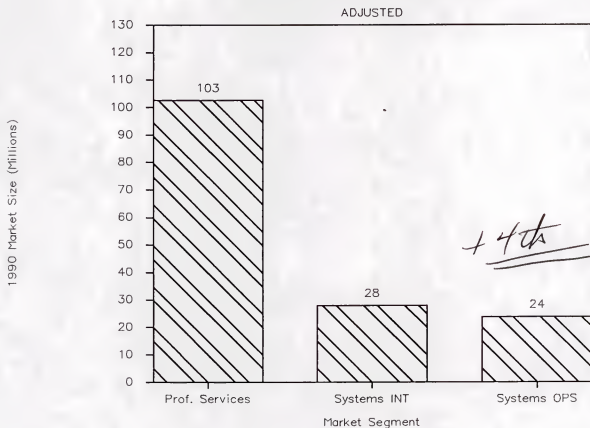
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FOIL #15**MARKET SIZING/FORECASTS - OVERVIEW**

- 
- Market segment sizes and forecasted growth
  - INPUT's observations
  - Other significant findings from user surveys



FOIL #16

**MARKET SIZING/FORECASTS****TRADING AREA MARKET SIZES**



FOIL #17

**MARKET PARAMETERS - PROFESSIONAL SERVICES**

OVERALL MARKET SIZE: \$102 (MM)

GROWTH RATE: 11%

1992 MARKET SIZE: \$125 (MM)

| MARKET SEGMENT                                                          | \$(MM)      | % |
|-------------------------------------------------------------------------|-------------|---|
| Executive Consulting                                                    | \$23MM → XX | X |
| Project Management<br>Applications Development<br>Software Installation | \$60MM → XX | X |
| Systems Programming                                                     | \$4MM → XX  | X |
| Education                                                               | \$38MM → XX | X |

23%

FOIL #18

**INPUT's COMMENTS - PROFESSIONAL SERVICES**

(Bullet slide containing observations.)

FOIL #19

**MARKET PARAMETERS - SYSTEMS INTEGRATION**

OVERALL MARKET SIZE: \$28 (MM)

GROWTH RATE: 20%

1992 MARKET SIZE: \$41 (MM)

Renewance

| MARKET SEGMENT             | \$(MM) | % |
|----------------------------|--------|---|
| Applications Integration   | XX     | X |
| Network Integration        | XX     | X |
| Infrastructure Integration | XX     | X |



FOIL #20

**INPUTs COMMENTS - SYSTEMS INTEGRATION***(Bullet slide containing observations.)*

FOIL #21

**MARKET PARAMETERS - SYSTEMS OPERATIONS**

OVERALL MARKET SIZE: \$24 (MM)  
GROWTH RATE: 17%  
1992 MARKET SIZE: \$32 (MM)

| MARKET SEGMENT          |         | \$(MM) | % |     |
|-------------------------|---------|--------|---|-----|
| Platform Operations     | \$ 17mm | XX     | X | 18% |
| Applications Management | \$ 7mm  | XX     | X | 16% |

FOIL #22

**INPUTs COMMENTS - SYSTEMS OPERATIONS***(Bullet slide containing observations.)*

FOIL #23

**SUMMARY & CONCLUSIONS - MARKET SEGMENTS***(Bullet slide containing summary/conclusions.)*



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FOIL #24**LOCAL INDUSTRY OBSERVATIONS  
DISCRETE MANUFACTURING**

- Largest sector in terms of employment and revenues *high tech*
- Most large employers associated in the information systems industry
  - Lockheed
  - Hewlett Packard
  - Northern Telecom
  - Rolm
  - AMD
  - Intel
  - National Semi
  - Varian
- Data suggests minimal use of outside consultants
- Minimal interest in Systems Integration & Systems Operations
- Applications software requirements tend to be industry specific
- Professional services needs tend to be industry specific

---

FOIL #25**LOCAL INDUSTRY OBSERVATIONS  
PROCESS MANUFACTURING**

- No heavy or extremely large industry
- Fodd processors are a large part of the market
- Low IS intensity compared to national average



FOIL #26

**LOCAL INDUSTRY OBSERVATIONS  
MEDICAL & EDUCATION**

- No major local medical buying points
  - University hospitals self-sufficient
  - Few chains
  - Some user of SO with specialized suppliers
- Large universities are small markets
- Local schools are heavily constrained
  - Budget crisis
  - Competitive/cost driven bidding procedures

*MULTIPLE BUILDING POINTS*

FOIL #27

**LOCAL INDUSTRY OBSERVATIONS  
STATE AND LOCAL GOVERNMENT**

- Very few major buying points
- Same budget and bidding constraints as education
- Strong preference for independent contractors
  - Cheaper
  - Focused expertise



---

FOIL #28**LOCAL INDUSTRY OBSERVATIONS  
OTHER INDUSTRIES**

- Industries with average IS intensity and site sizes  
*Services, EDP Services, Agriculture/Mining/Construction*
- Industries with below average IS intensity/no major sites  
*Transportation/Utilities, Wholesale/Retail Distribution  
Financial Services*
- Federal government has minimal market potential locally
  - Local employment largely military
  - Few major general purpose sites

---

FOIL #29**COMPETITIVE ANALYSIS**

- General observations on vendors - from user survey
- INPUT's analysis of key local vendors
- Summary and conclusions



FOIL #30

**GENERAL OBSERVATIONS ON VENDORS**

- Systems programming support almost exclusively from...



Hardware vendors  
Package vendors (Oracle, etc.)

- Accounting firms have less than average market

*However: Dominate executive consulting*

- CRG and Disabled Programmers very frequently mentioned  
(Applications Programming) BODY SHOP

FOIL #31

**USER VIEWS - MAJOR DELIVERY MODE**

EDUCATED —

| DELIVERY MODE                 | VENDOR    | %* |
|-------------------------------|-----------|----|
| Applications/Systems Software | Vendor #1 | XX |
|                               | Vendor #2 | XX |
|                               | Vendor #3 | XX |
| Processing Services           | Vendor #1 | XX |
|                               | Vendor #2 | XX |
|                               | Vendor #3 | XX |
| Professional Services         | Vendor #1 | XX |
|                               | Vendor #2 | XX |
|                               | Vendor #3 | XX |
| Systems Integration           | Vendor #1 | XX |
|                               | Vendor #2 | XX |
|                               | Vendor #3 | XX |
| Systems Operations            | Vendor #1 | XX |
|                               | Vendor #2 | XX |
|                               | Vendor #3 | XX |



ONE CHART -  
VENDOR METITUDOCOGY



---

FOIL #32**USER VIEWS OF VENDORS - SPECIFIC MARKET SEGMENTS****Professional Services:**

- Strong preferences for packaged vendors
- Use of independents with highly specialized expertise
- Heavier use of contractors than industry in general

**Systems Integration/Systems Operations:**

- Generally picked for industry application or functional expertise
- Network integration the most common area of need

---

FOILS #35 - #37 (One for each of five vendors.)**VENDOR PROFILE**

- National Market Strategy/Position
  - *National Revenues/Growth Rates*
  - *Key Vertical Markets*
  - *Key Strengths*
  - *Unique Characteristics*
  - *Key Weaknesses*
- Local Capabilities
  - *Key Vertical Markets*
  - *Unique Technologies/Facilities*
  - *View of Competition*
  - *Organization/Coverage*

---

FOIL #38**LOCAL COMPETITION - INPUT's VIEWS**

(Bullet slide giving INPUT's views/analysis on the local competition.)



---

FOIL #39 - #41

**INPUT's OBSERVATIONS ON IBM**

*(Bullet slide giving INPUT's views/analysis regarding IBM.)*

---

FOIL #42 - #44

**SUMMARY AND CONCLUSIONS**

*(Key observations and recommendations.)*



## Forecast Methodology - Process

Convert INPUT U.S.

- ~~Calculate the Market~~ Mkt Forecast +  
per-Employee Basis
  - Industry
  - Delivery Mode

Preliminary

- <sup>Preliminary</sup> S. Bay Forecast Based on CI  
Employment data
- Adjustment for Local Market Factors
  - User Survey
  - INPUT Research & expertise



## Forecast Methodology - Potential Issues

- Use of CI database
  - Industry classification vs. INPU and Dept of Commerce Standards
  - Depth of market coverage (% of all relevant sites)
- CI Employment vs. Total Industry Employment
- All Issues Satisfactorily Resolved



## Forecast Methodology - Data

1990

- INPUT ~~Market~~ U.S. Market Forecast
  - Industry
  - Delivery Mode
- ~~Market~~ Commerce Dept Industry Employment Statistics
  - Computer Intelligence (CI) Database
    - All sites within S. Bay market area
    - Employment by industry
      - S. Bay
      - Nationally



## LOCAL AREA INDUSTRY OBSERVATIONS

### DISCRETE MFG

⇒

- MOST LARGE ~~EMPLOYERS~~ EMPLOYERS ASSOCIATED WITH INFORMATION SYSTEMS INDUSTRY FRONT  
IN LOCKHEED
  - AMD
  - H.P.L.
  - INTEL SEMI
  - NORTHERN TELECOM
  - NATL SEMI
  - ROLM
  - XERIAN
- MINIMAL USE OF OUTSIDE CONSULTANTS
- MINIMAL/NO INTEREST IN SI OR SO
- LARGEST SECTOR IN TERMS OF EMPLOYMENT, REUS
- APPLIC. SW TEND TO BE INDUSTRY-SPECIFIC, AS DOES SUPPORTING PROFS EXERTISE



<sup>Area</sup>  
LOCAL INDUSTRY OBSERVATIONS

PROCESS MFG

- NO HEAVY/LARGE INDUSTRY
- FOOD PROCESSORS LARGE PART OF MKT
- LOW ES-INTENSITY



## LOCAL AREA INDUSTRY OBSERVATIONS

### MED/EDUC

- NO MAJOR LOCAL MED BUYING POINTS
  - UNIV HOSPITALS SELF-SUFFICIENT
  - FEW CHAINS
  - USE OF PROCESSING SERVICES SO  
(FIRMS W/INDUSTRY-SPECIALIZED SYSTEMS)
- LARGE UNIVERSITIES ARE SMALL MARKETS
- LOCAL SCHOOLS HEAVILY CONSTRAINED
  - BUDGET CRISIS
  - COMPETITIVE, COST-DRIVEN BID PROCEDURES



## LOCAL AREA INDUSTRY OBSERVATIONS

### STATE & Loc GOVT

- VERY FEW MAJOR BUYING POINTS
- SAME BUDGET AND BIDDING CONSTRAINTS AS SCHOOLS
- STRONG PREFERENCE FOR INDEPENDENT CONTRACTING
  - CHEAPER
  - MORE FOCUSED EXPERTISE



## LOCAL AREA ENVIRONMENTAL OBSERVATIONS

### OTHER INDUSTRIES

- FOLLOWING INDUSTRIES HAVE AVERAGE  
IN INTENSITY AND SITE SIZES

- \* SERVICE INDUSTRIES

- ✓ EDP SERVICES

- \* AGRICULTURE / MINING / CONSTRUCTION



## LOCAL AREA INDUSTRY OBSERVATIONS

### OTHER INDUSTRIES

- FOLLOWING INDUSTRIES HAVE :
  - NO MAJOR LOCAL SITES
- FEW BELOW AVERAGE IS INTENSITY

- \* TRANS/UTIL
- \* WDIS/RDIS
- \* BAND/SEL
- \* INSR/FIN

- FEDERAL GOVT HAS MINIMAL MARKET POTENTIAL
  - LOCAL EMPLOYMENT LARGELY MILITARY
  - FEW MAJOR GENERAL-PURPOSE SITES



## GENERAL OBSERVATIONS VENDORS

- SYSTEMS PROGRAMMING SUPPORT ALMOST EXCLUSIVELY FROM HARDWARE VENDORS AND/OR PACKAGE VENDORS (EC, ORACLE)
- A CUTE FIRM HAVE MINIMAL MENTION - GENERALLY FOR EXECUTIVE CONSULTING
- CRL AND DISABLED PROGRAMMERS VERY FREQUENTLY MENTIONED IN APPLIC PROGRAMMING



## GENERAL OBSERVATIONS

### APPLIC PROGRAMMING SUPPORT

- STRONG PREFERENCES FOR USE OF
  - PKG VENDOR
  - INDEPENDENTS
  - HEAVY FOCUSSED/SPECIALIZED EXPERTISE
- STRONG PREFERENCE TO USE PACKAGER WHEREVER POSSIBLE
- STRONG PREFERENCE FOR KEEPING IN-HOUSE STAFF DOWN



## GENERAL OBSERVATIONS

### SI/SO

- SI/SO VENDORS GENERALLY PICKED FOR INDUSTRY APPLICATIONS OR FUNCTIONAL EXPERTISE
- NETWORK INTEGRATION MOST COMMONLY CITED NEED IN SI



APR 4 '91 10:40

PAGE.001

## FACSIMILE TRANSMITTAL COVER SHEET

IBM

International Business Machines Corporation  
2099 Gateway Place - 6th Floor.  
San Jose, CA 95110

FRANCHON

VP COLO

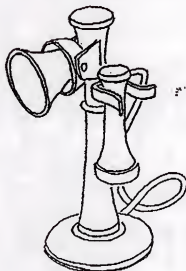
To: Denny Wayson  
Fax: 415-961-3966  
Phone: 415-961-

From: J. Glueck  
Fax: 408-452-4031 (T/L 585)  
Phone: 452-4907

Date: 4/4/91

Security: ☒ IBM Confidential  
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Comments: Pls deliver to Denny  
Immediately, contains Conf. data

To confirm receipt, please call (408) 452-4901 (T/L 585-4901)



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PAGE.002

## **MARKET ANALYSIS**

- WHY DO WE CARE ABOUT MARKET SHARE?
- HOW DO WE DEFINE OPPORTUNITIES?
- WHAT AND WHERE ARE THE OPPORTUNITIES IN THE FUTURE?
- HOW SHOULD WE SEGMENT THE MARKET PLACE?
- HOW CAN WE USE THE MARKET ANALYSIS INFO?
- WHAT SHOULD BE THE GREATER SILICON VALLEY TRADING AREA'S MARKET SHARE IN 1991, 1992 AND 1993?
- SHOULD WE PLAY IN ALL SEGMENTS OF THE MARKET?
- DO WE HAVE ENOUGH RESOURCES TO CAPTURE ALL THE OPPORTUNITIES?

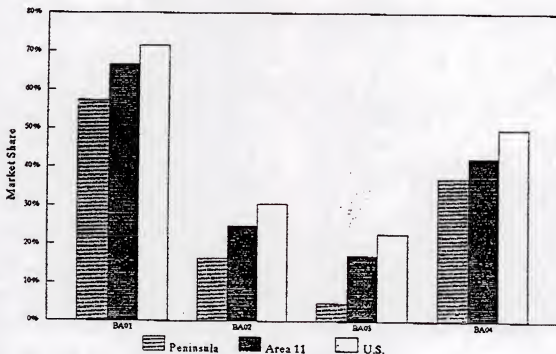


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PAGE.003

# Peninsula Trading Area vs. Area 11 and U.S. IBM Market Share – BA 01, 02, 03 and 04 Installed Units

Source: All Vendor File 9/90



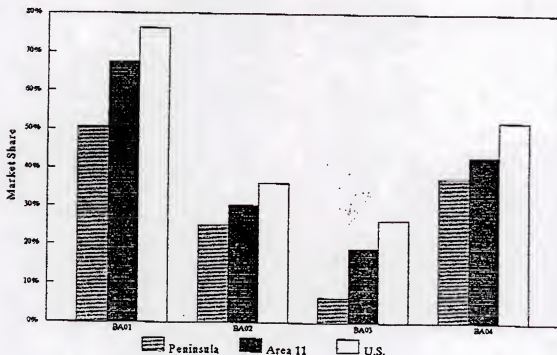


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PAGE.004

# Peninsula Trading Area vs. Area 11 and U.S. IBM Market Share – BA 01, 02, 03 and 04 Dollar Value of Installed Units

Source: All Vendor File 9/90



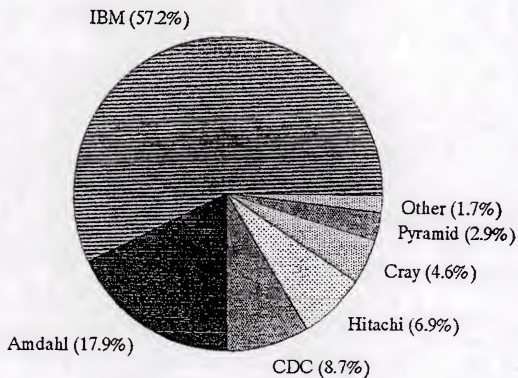


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PAGE.005

# Peninsula by Vendor: BA 01 Installed Units

Source: All Vendor File 9/90



Total: 173 Units

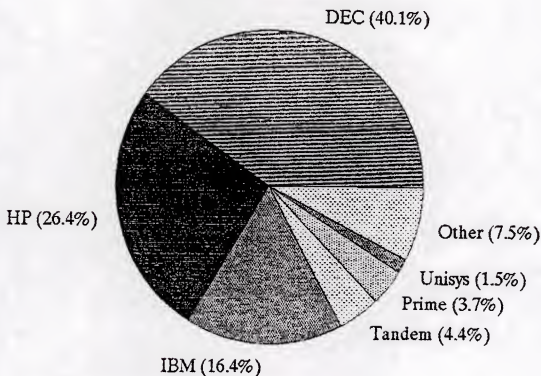


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PAGE.006

## Peninsula by Vendor: BA 02 Installed Units

Source: All Vendor File 9/90



Total: 1,445 Units

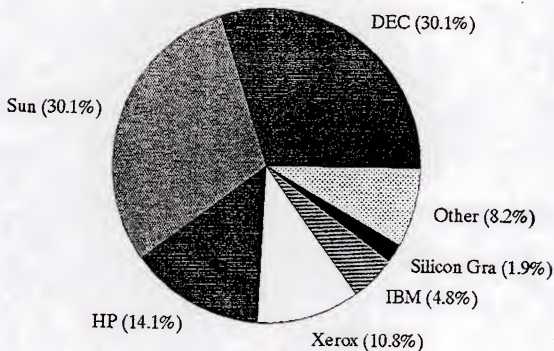


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PAGE.007

## Peninsula by Vendor: BA 03 Installed Units

Source: All Vendor File 9/90



Total: 7,436 Units

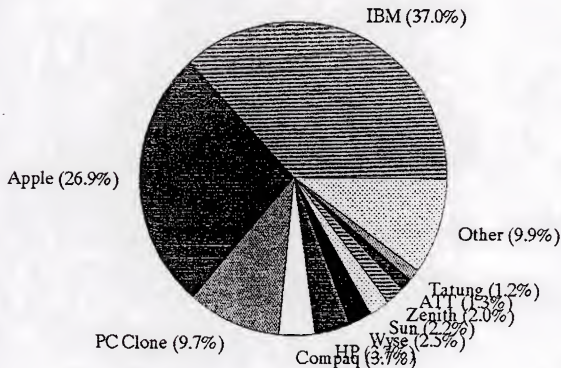


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PAGE.008

## Peninsula by Vendor: BA 04 Installed Units

Source: All Vendor File 9/90



Total: 83,798 Units

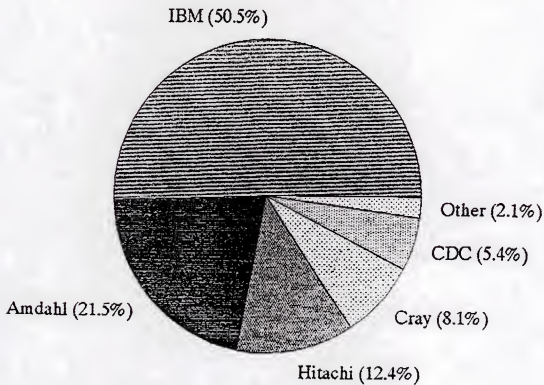


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PAGE.009

## Peninsula by Vendor: BA 01 Dollar Value of Installed Units

Source: All Vendor File 9/90



Total: \$1,326,415,000



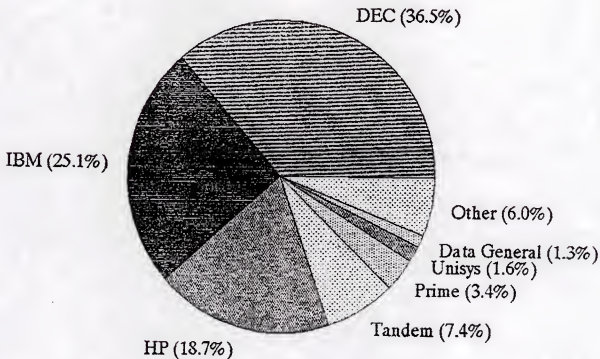
APR 4 '91 10:45

PAGE.010

## Peninsula by Vendor: BA 02

### Dollar Value of Installed Units

Source: All Vendor File 9/90



Total: \$593,235,000

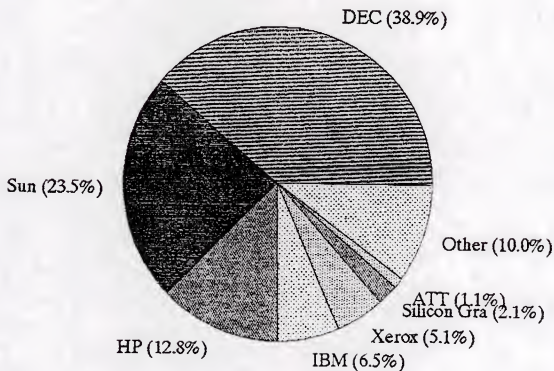


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PAGE.011

## Peninsula by Vendor: BA 03 Dollar Value of Installed Units

Source: All Vendor File 9/90



Total: \$264,592,000

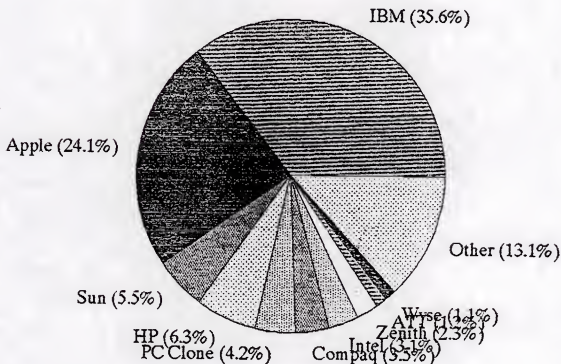


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PAGE.012

## Peninsula by Vendor: BA 04 Dollar Value of Installed Units

Source: All Vendor File 9/90



Total: \$301,148,000



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PAGE.013

OW10M2

DLEE

2/28/91

# WORLDWIDE INDUSTRY OUTLOOK

1989

**IBM**

\$63B.

**INDUSTRY**

\$385B.

95/89  
% CGR

WORKSTATIONS  
(INCL. SYS. SW  
AND MAINT.)

SYSTEMS  
(INCLUDES  
SYSTEM SOFTWARE  
& MAINTENANCE)

APPLICATION  
SOFTWAREPROFESSIONAL  
& TELECOM.  
SERVICES

WORKSTATIONS

SYSTEMS

17%

15%

13%

6%

3%

3%

15%

IBM  
SHARE 28%

IBM CONFIDENTIAL

OW10M2-10/5(w10)



# Opportunity Development Methodology

## Input Elements

- \* Actual 1990 revenue from top 300 I/S vendors
- \* Corporate economic outlook and growth for 1991, 1992, 1993
- \* Industry customer expenditure survey
- \* Employment data from Bureau of Labor Statistics (by county)



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PAGE.016

**Market Analysis**

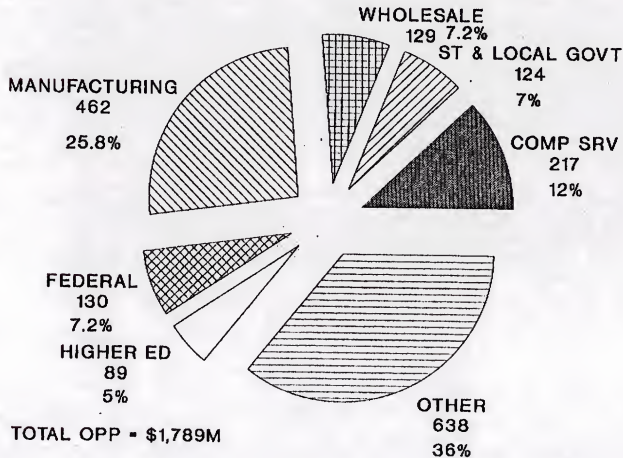
**1990 GEO/CSE OPPORTUNITY ESTIMATE  
CONSISTENT WITH 1990 IRE & CSE NATIONAL  
VIEWS (unadjusted for GSV Trading Area)**

**TRADING AREA vs. AREA COMPARISONS**

|                              | REVENUE IN MILLIONS |        |        | GROWTH    |           |
|------------------------------|---------------------|--------|--------|-----------|-----------|
|                              | 1990                | 1991   | 1993   | '90 - '91 | '90 - '93 |
| <b>SYSTEMS</b>               |                     |        |        |           |           |
| GSVTA                        | 1063                | 1134   | 1338   | 6.9       | 7.9       |
| AREA 11                      | 9395                | 10,119 | 11,890 | 7.7       | 8.2       |
| <b>PROFESSIONAL SERVICES</b> |                     |        |        |           |           |
| GSVTA                        | 225                 | 252    | 328    | 12.0      | 13.3      |
| AREA 11                      | 2099                | 2366   | 3078   | 12.7      | 13.6      |
| <b>TELECOM</b>               |                     |        |        |           |           |
| GSVTA                        | 383                 | 400    | 467    | 4.2       | 6.8       |
| AREA 11                      | 3604                | 3787   | 4439   | 5.1       | 7.2       |
| <b>TOTAL</b>                 |                     |        |        |           |           |
| GSVTA                        | 1672                | 1789   | 2132   | 7.0       | 8.5       |
| AREA 11                      | 15,098              | 16,272 | 19,407 | 7.8       | 8.7       |



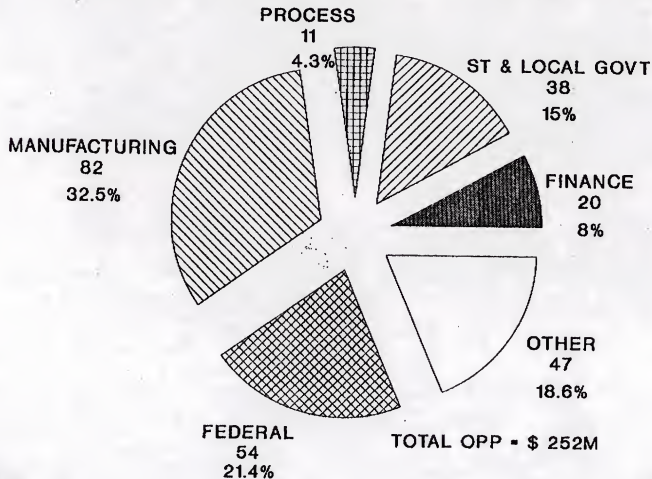
# Market Opportunity 1991(unadjusted) Greater Silicon Valley Trading Area



1991M1



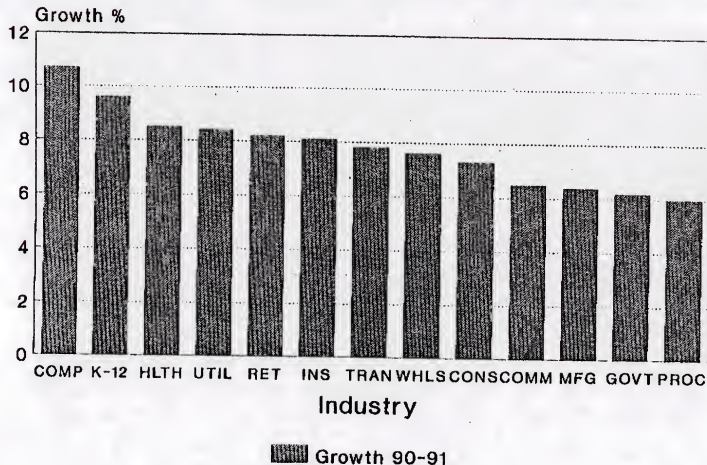
# PS Market Opportunity 1991(unadjusted) Greater Silicon Valley Trading Area



1991psM



# Market Growth 90-91



mg91



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PAGE.020

## ***Market Share Measurements -- Opportunity Models***

### **Geographic (HQ View)**

Revenue = Territory Revenue

Opportunity:

| <u>Industry<br/>Class</u> | <u>Industry Average<br/>IS \$ per Employee</u> | <u>Trading Area Counties<br/>Employee Population</u> | <u>Opportunity</u> |
|---------------------------|------------------------------------------------|------------------------------------------------------|--------------------|
| A                         | B                                              | C                                                    | B X C              |

### **Customer (Trading Area View)**

Revenue = Customer Revenue

Opportunity:

| <u>Industry<br/>Class</u> | <u>Industry Average<br/>IS \$ per Employee</u> | <u>Customer<br/>Employee Population</u> | <u>Opportunity</u> |
|---------------------------|------------------------------------------------|-----------------------------------------|--------------------|
| A                         | B                                              | C                                       | B X C              |



## **Market Analysis**

### **Opportunity Adjustment**

#### **Geography view of total opportunity**

##### **Exclude employment from:**

- Non-revenue sources IBM/GPD, ROLM, fractions of computer vendors
- TBOs of DRAs with HQs outside of Trading Area

##### **Add:**

- TBO employment of DRAs, SNAs HQs in Trading Area

#### **Customer view of total opportunity**



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PAGE.022

## **MARKET SHARE**

### **DEFINITION**

MARKET SHARE (U.S.) =

(IBM REVENUE) / (CUSTOMER SPENDING ON IS)

MARKET SHARE (TRADING AREA) =

(CUSTOMER REVENUE) / (ADJUSTED CUSTOMER  
SPENDING ON IS)



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PAGE.014

***Market Analysis*****GUIDE TO INDUSTRY CODES**

| INDUSTRY<br>CODE | INDUSTRY<br>DESCRIPTION |
|------------------|-------------------------|
| A                | COMMUNICATIONS          |
| B                | COMPUTER SERVICER       |
| C                | CONSULTANTS             |
| D                | RETAIL DISTRIBUTION     |
| E                | HIGHER EDUCATION        |
| F                | FINANCE                 |
| G                | STATE AND LOCAL         |
| H                | HEALTH                  |
| J                | WHOLESALE DISTRIBUTION  |
| K                | MEDIA                   |
| M                | MANUFACTURING           |
| N                | INSURANCE               |
| P                | PROCESS                 |
| R                | SCHOOLS                 |
| S                | SECURITIES              |
| T                | TRANSPORTATION          |
| U                | UTILITIES               |
| Y                | FEDERAL                 |



# GREATER SILICON VALLEY TRADING AREA

## 1990 OPPORTUNITY AND MARKET SHARE (unadjusted)

| GEOPOP |           | TERR/<br>TOTAL | ALL VENDOR SPENDING |           | IBM REVENUE |         | IBM<br>MARKET SHARE |      |
|--------|-----------|----------------|---------------------|-----------|-------------|---------|---------------------|------|
| IND    | TOTAL     |                | GEO-CSE             | TERR-CSE  | TERR        | CUST    | TERR                | CUST |
| DP     | EMPS      |                |                     |           |             |         |                     |      |
|        | Count     | %              | \$K                 | \$K       | \$K         | \$K     | %                   | %    |
| A      | 13,482    | 22.5           | 43,000              | 9,690     | 1,106       | 1,198   | 2.5                 | 2.8  |
| B      | 16,485    | 89.3           | 196,000             | 175,116   | 20,659      | 22,364  | 10.5                | 11.4 |
| C      | 22,002    | 63.9           | 40,000              | 25,551    | 860         | 1,226   | 2.1                 | 3.0  |
| D      | 128,557   | 60.5           | 66,000              | 39,899    | 576         | 812     | 0.8                 | 1.2  |
| E      | 37,074    | 99.1           | 84,000              | 83,219    | 9,941       | 12,949  | 11.8                | 15.4 |
| F      | 31,920    | 70.7           | 116,000             | 81,966    | 5,768       | 7,433   | 4.9                 | 6.4  |
| G      | 75,283    | 97.9           | 117,000             | 114,508   | 6,867       | 6,937   | 5.8                 | 5.9  |
| H      | 113,047   | 90.9           | 66,000              | 59,974    | 3,560       | 4,377   | 5.4                 | 6.6  |
| J      | 153,825   | 90.1           | 120,000             | 108,148   | 14,403      | 18,048  | 12.0                | 15.0 |
| K      | 50,603    | 89.3           | 49,000              | 43,764    | 3,111       | 4,542   | 6.3                 | 9.2  |
| M      | 434,753   | 85.8           | 434,000             | 372,284   | 88,050      | 121,343 | 20.0                | 28.0 |
| N      | 12,967    | 58.3           | 50,000              | 29,151    | 465         | 1,009   | 0.9                 | 2.0  |
| P      | 46,166    | 87.4           | 49,000              | 42,826    | 11,199      | 11,809  | 22.8                | 24.0 |
| R      | 57,252    | 99.5           | 30,000              | 29,849    | 2,655       | 2,690   | 8.8                 | 8.9  |
| S      | 3,122     | 89.4           | 16,000              | 14,298    | 281         | 360     | 1.7                 | 2.2  |
| T      | 22,458    | 77.9           | 46,000              | 35,823    | 662         | 1,002   | 1.4                 | 2.2  |
| U      | 6,383     | 50.0           | 15,000              | 7,500     | 1,430       | 1,542   | 9.5                 | 10.3 |
| Y      | 53,546    | 100.0          | 123,000             | 123,000   | 11,788      | 17,998  | 9.6                 | 14.6 |
| TOTAL  | 1,278,925 | 79.8           | 1,660,000           | 1,389,831 | 183,381     | 237,639 | 11.0                | 14.3 |

