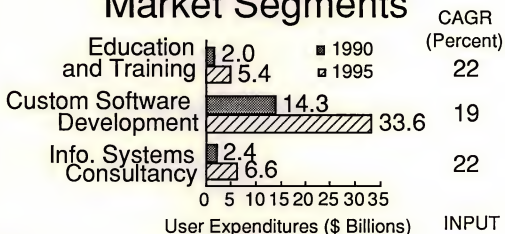


Western Europe, 1990-1995

Professional Services Market Segments



E-PF-1

Notes



Professional Services, Western Europe

Leading Vendors, 1989

Rank	Vendor	Market Share (Percent)
1	IBM	5
2	CAP Gemini Sogeti	5
3	Finsiel	2
4	Sema	2
5	Andersen Consulting	2

E-PF-2

INPUT

Notes



Western European Vendor Selection Criteria

	IS Mgmt.	General Mgmt.
Proven Delivery Capability	8.6	8.4
Technical Staff	8.2	8.7
Performance Guarantee	8.8	8.1

INPUT

E-PF-3a

Notes

Vendor Selection Criteria

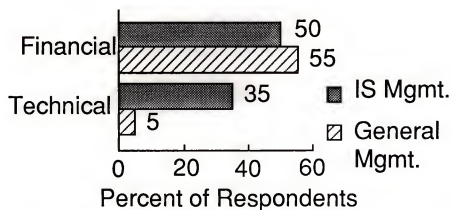
	IS Mgmt.	General Mgmt.
Industry Knowledge	8.0	8.0
System Support	7.4	7.8
Price	6.9	6.6
Project Responsibility	6.2	6.9

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E-PF-3b

Notes

Western European Constraints on New Project Development

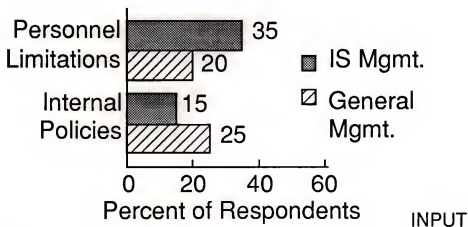


E-PF-4a

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Notes

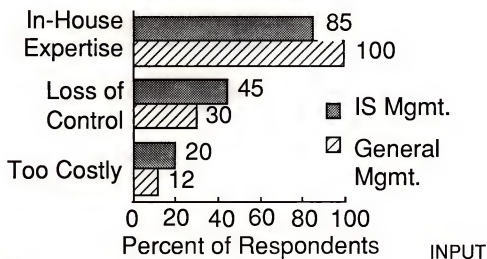
Western European Constraints on New Project Development



E-PF-4b

Notes

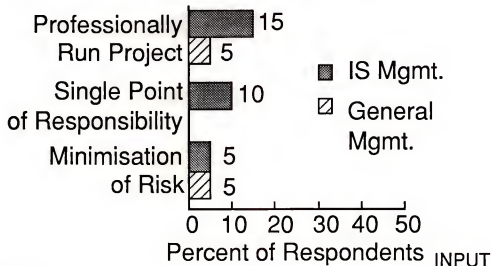
Subcontracting Resistance



E-PF-5

Notes

Benefits from Contracting

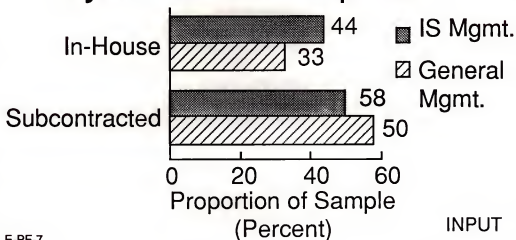


E-PF-6

Notes



Western European Major Systems Development



E-PF-7

Notes

Application Maintenance Sources (Percent)

	In- House	Equip. Vendor	SW Vendor	Prof. Serv. Vendor
Germany	45	30	20	-
France	35	45	5	15
U.K.	40	20	10	25
Italy	50	10	35	5

E-PF-8

Sample Error $\pm 5\%$

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Notes



Professional Services Markets

- Business cultures
- Consultancy and software development/maintenance
- Systems integration
- Systems operations

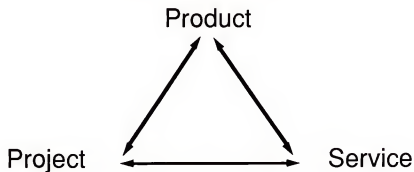
E-PF-9

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Notes



Conflicting Business Cultures



E-PF-10

INPUT

Notes

Professional Services Market Western Europe

Subsector	\$ Billions		
	1991	'91-'96 CAGR (%)	1996
Consulting	3.3	17	7.1
Educ. and Training	2.6	14	5.1
Software Develop.	18.8	16	39.7

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E-PF-11

Notes



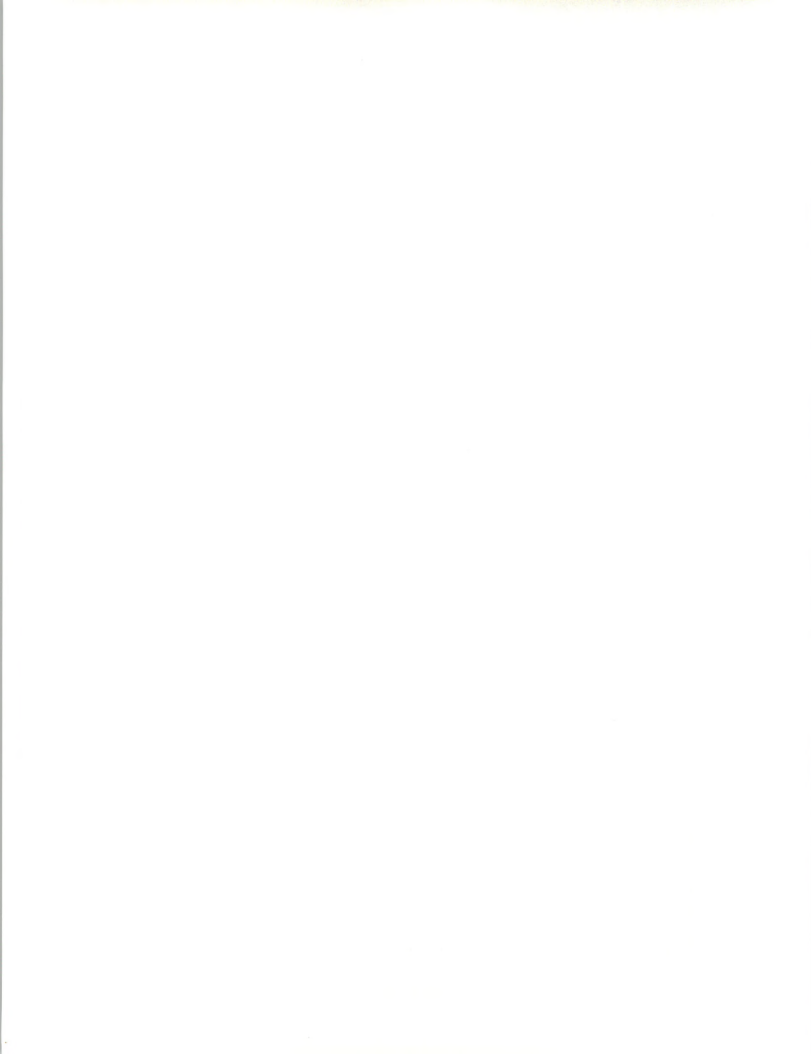
Migrating to Standards

Skills Shortages Create Service Opportunities

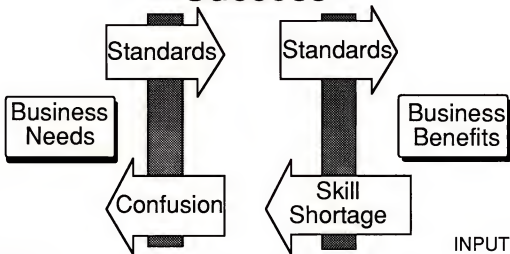
E-PF-12

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Notes



Barriers To Migration Success

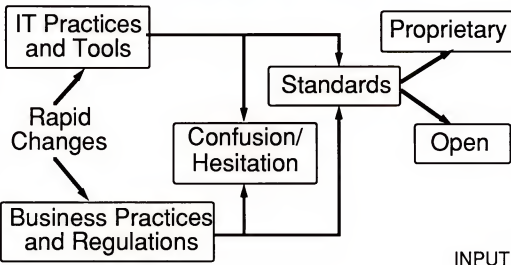


E-PF-13

Notes

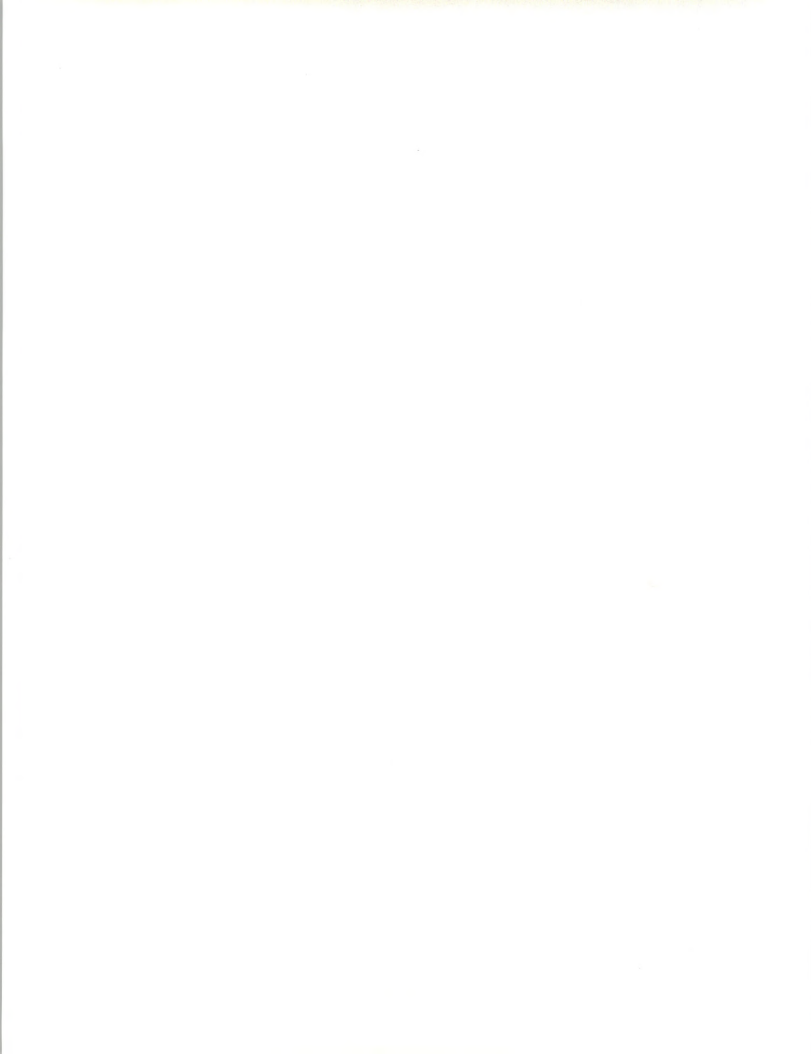


Drive Towards Standards

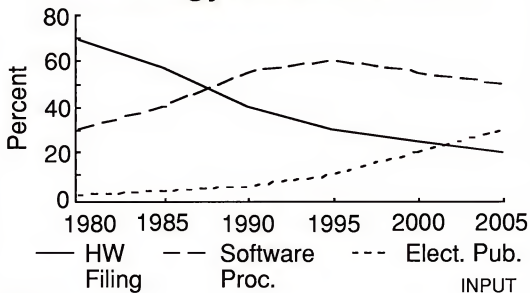


E-PF-14

Notes



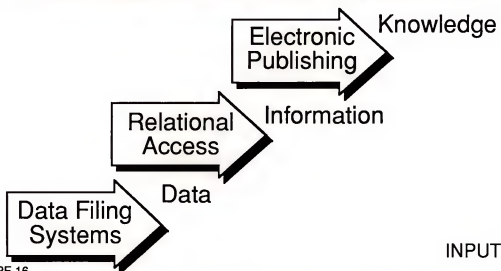
Technology Market Shares



E-PF-15

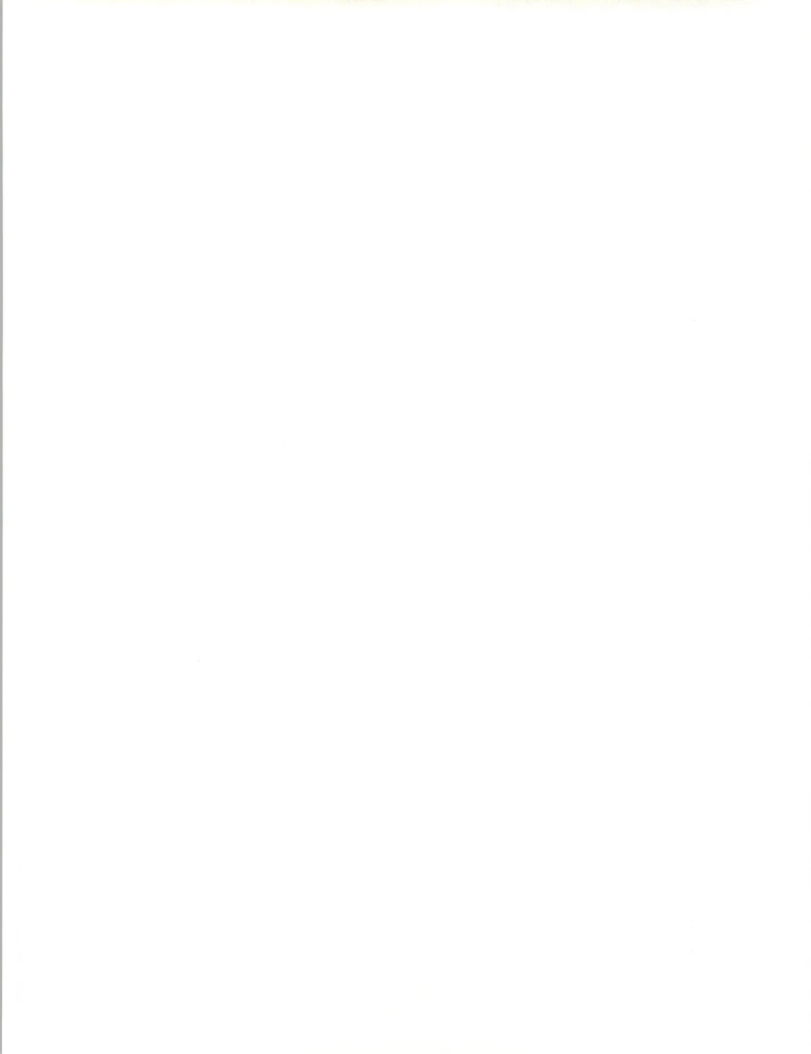
Notes

Information Access Potential Demand Evolution



E-PF-16

Notes



Distributed Data Types

Records Accounting

Inventory

Sales

Text Notes

Letters

Documents

Graphics Charts

Maps

Drawings

Images Facsimile

Video

Pictures

E-PF-17

INPUT

Notes

Distributed Data Types

Voice Messages
Annotations
Response

Other Programs
Knowledge Rules
Metadata

E-PF-18

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Notes

Data Warehouse Strategy

MS Office for
Windows User

Oracle
MIS (Management IS)

DB2
Corporate Admin.

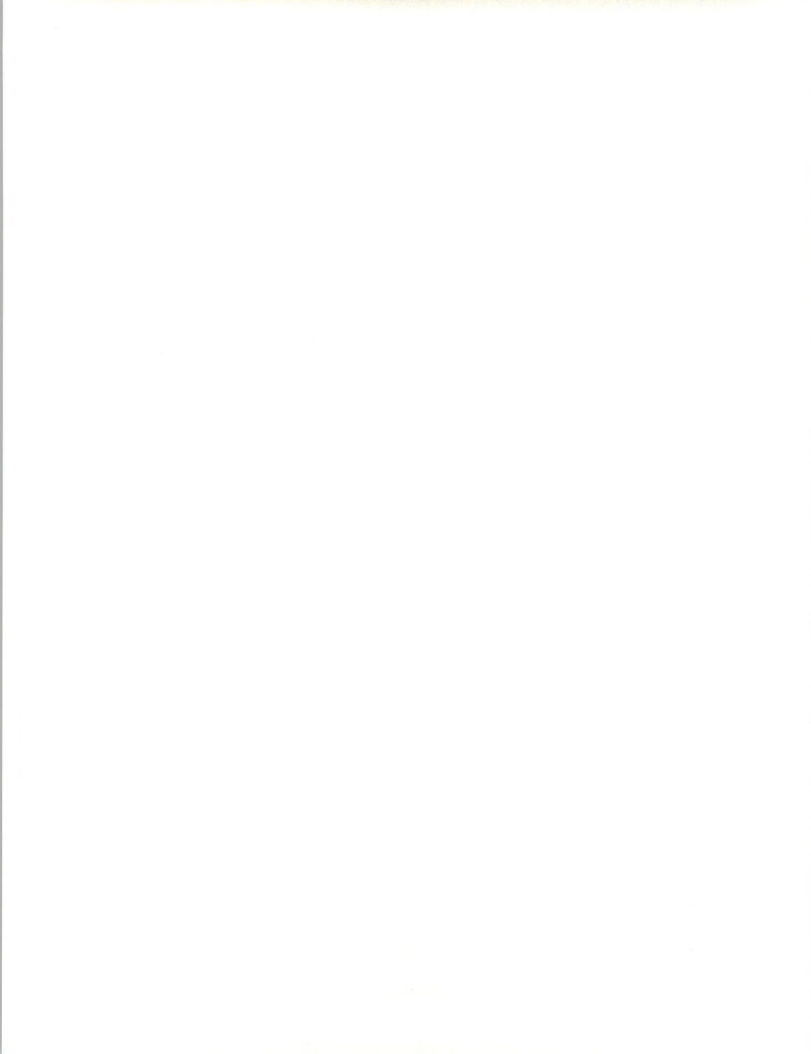
IDMS
Operational

Database Warehouses

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E-PF-19

Notes



Software Standards A Benefits Case Study

- Scalable duplicate applications
- Data centre consolidation
- Improved customer information
- Efficient in-house development
- Minimised duplicate efforts
- Real time executive information

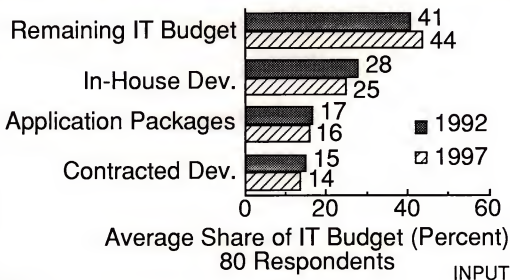
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E-PF-20

Notes



IT Budget Changes, Europe



E-PF-21

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Notes



Recommended Migration Services

- Staff training
- Specialist consultancy
- Development projects
- Migration support
- Integration projects
- Software maintenance
- Systems operations

E-PF-22

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Notes



The Key Industry Trends

- Revolution
- Metamorphosis
- Migration

E-PF-23

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Notes

