Quelles Perspectives pour les Services autour du Client/Serveur?

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Quelles Perspectives pour les Services autour du Client/Serveur?

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1993

Client/Server: The New IT Environment

Peter A. Cunningham
President
INPUT

Topics

- Introduction
  - IT Revolutions
  - Client/Server Computing
- Client/Server User Implementation
- Vendor Strategies
- Conclusion

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Notes

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Introduction

Notes

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Revolutions

- Downsizing
- Outsourcing
- Re-engineering
- Networking

IS-94a

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Client/Server Computing Description

- Concept involves
  - Sharing of responsibility; client and server necessary for applications result
  - 'Action' on the part of both client and server computers to achieve result

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Client/Server Computing Description

- Server computer provides information, software and/or resources to client computers to enable applications processing

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Client/Server User Implementation

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C/S Sample Characteristics

Characteristic	1993	1997
Avg. No. of Clients	1,294	2,318
Avg. No. of Servers	24	96
Avg. No. of LANs	34	78
Server/LAN Ratio	0.71	1.23
Client/Server Ratio	70/1	55/1

124 respondents

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Equipment Selection Reasons

Reason	Proportion of Mentions (%)	
	Client	Server
In-Place	33	31
Price-Performance	25	22
Standards	18	11
Other	23	35

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Notes

*Top four from 60 user surveys

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Conclusions—Equipment

- Servers are increasingly large PCs
- Already 'Legacy' C/S structures
- "Intel" is a leading C/S vendor
- Client market saturating
- Server market is open

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Distribution of Operating Systems

OS	Proportion of Mentions (%)	
	Client	Server
DOS	$\boxed{73}$	$\boxed{38}$
UNIX	7	32
OS2	14	13
Other	7	17

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Distribution of Network Operating Systems

OS	Proportion of Responses (%)
Netware	74
LAN Manager	8
LAN Server	7
TCP	6
Other	10

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Conclusions
Operating Systems

- Dislocation between client and server OS
  - Clients, DOS is 'there'
  - Servers, selection is open
- Novell dominates NOS—No change expected
- NT is not penetrating rapidly

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Conclusions on DBMS

- Oracle is well positioned on both C and S
- Microsoft gaining ground fast
  - FoxPro on both C and S
  - Access on clients

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Notes

Conclusions on DBMS

- Data base systems may be increasingly unnecessary on clients
  - 'Run-time' versions with data
  - No need for data management
- Variety of data base combinations exploding

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Impacts on Vendor Strategies

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Vendor Strategies
Systems Companies

- Establishing C/S units
  - IBM
  - Data General
  - Tandem
  - Amdahl
- Generally attacking market
  - DEC

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Vendor Strategies
Systems Companies

- "Cosmetic" approach in many cases
- Attempting to 'co-opt' the market
- Supported by consultants/IS managers

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Vendor Strategies—Software Products Companies

- Running scared/hard
- High-end products
  - Downsizing products
  - Choosing ADEs difficult
  - Dramatically reduced pricing
  - Costly process

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Vendor Strategies—Software Products Companies

- Low-end products
  - Adding features/functions
  - Potential for network distribution
  - Slowing client growth
  - Server pricing difficult

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Vendor Strategies
Services Companies

- Integrators leveraging knowledge
  - Andersen, CSC, Systemhouse, TRW
- Professional services companies switching skills
  - CGS, CTG, IMI

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Vendor Strategies
Services Companies

- Processing companies addressing threats
  - ADP, EDS, TCC
- Network companies seizing opportunities
  - AOL, CompuServe, CONNECT

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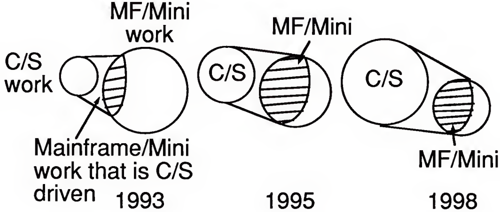
Client/Server Influence on Professional Services Work



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Vendor Strategies

- Developing software for multiple platforms
- Acquiring/developing C/S skills
- Establishing technology centers
- Struggling with marketing/sales
- Stepping across boundaries

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Conclusions

- Data supports:
  - Movement to users
  - Fragmentation
  - Movement away from "standards"
  - Movement towards interoperability

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Conclusions

- Changing demand for products and services
  - Targets are more diffused
  - Needs are defined more narrowly
  - Buyers are more 'selfish'

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Conclusions

- C/S accelerates impact of price performance improvements
- Network products/services prime opportunities
- Internet is the network model of the future
- Small ("piggyback") networks will multiply

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Successful Products and Services—Characteristics

- High-value, low-cost (of ownership)
- On the winning platforms
- Flexible and extendable
- Easily implemented and operated
- Low cost, high value support
- Constantly improved price/ performance

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Successful Products and Services—Marketing

- Win "beauty contests"
- Influence the influencers
- Price properly

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PETER A. CUNNINGHAM
PRESIDENT

PROFILE

- Mr. Cunningham has 28 years of experience in the information technology industry, including over 20 years of P&L responsibility in consulting.
- Mr. Cunningham provides information and advice to users and vendors of information technology. He specializes in analysis and forecasting of major trends in the industry, particularly in software, services, and the impact of information technology on people and organizations.
- In 1974, Mr. Cunningham founded INPUT to provide planning services, market research and consulting to buyers and vendors of IT products and services on a worldwide basis. The company specializes in analyzing and forecasting the applications and use of IT, particularly through the information services industry. This industry is now over $250 billion per year in size and is being driven by trends in outsourcing, systems integration, and downsizing. INPUT's mission is to provide its clients the ability to benefit from these and other IT trends and opportunities.
- Previously, he was a founder and President of J.W. Goodhew and Associates, Inc., a Washington, D.C. data processing consulting company specializing in the Medicaid, association, and manufacturing industries, as well as the federal government. Prior to that, Mr. Cunningham was with Management Science America, responsible for data processing projects in government and industry.
- Mr. Cunningham came to the United States with C-E-I-R, for whom he performed systems development and management.
- Mr. Cunningham started his career with ICL in 1964 in systems software development.

EDUCATION

- B.Sc. (Physics), Associate of the Royal College of Science, Imperial College, London
- M.P.A. (Technology of Management), The American University, Washington, D.C.

MEMBERSHIPS

- Fellow of the British Computer Society
- Member of the Worshipful Company of Information Technologists (Guild of the City of London)

European Opportunities in Client/Server Information Services

Peter Lines
Director
INPUT—Europe

European Client/Server Markets

- Economic/political environment
- User community impacts
- Five-year market forecasts
- Services industry—year 2000
- Strategies for success

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European Community 1993

- Shattered vision and economic difficulties create new environment for IT decisions

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European IT Users

- Demand client/server applications
- Require support and services
- Drive IT expenditure externally

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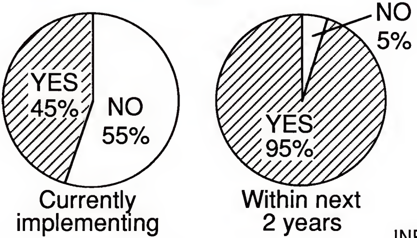
European Client/Server Implementation Plans



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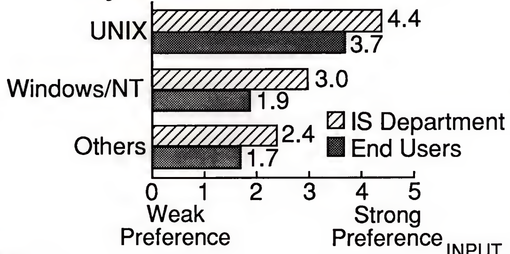
European Operating System Preferences



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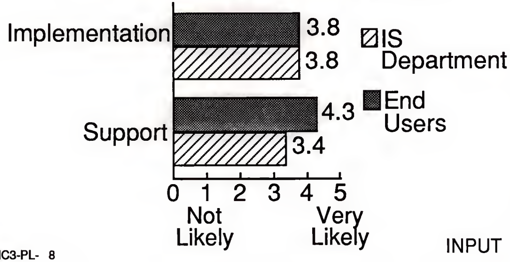
European User Need for Client/Server Services



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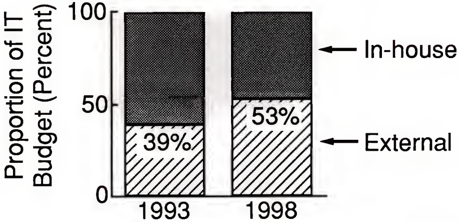
European IT Spending Changes



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European Client/Server Markets

- Software product brand leaders scale up
- Open competition for client/ server projects
- Transition costs fuel outsourcing

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European Software and Services Market C/S Impact

Sector	1993-1998 CAGR (%)	1998 Market Proportion (%)
C/S	+43	65
Non C/S	-9	15

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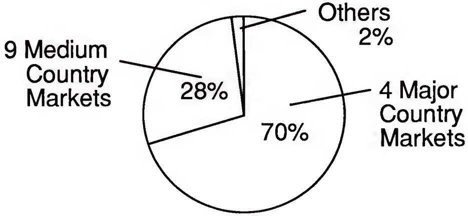
European Market Analysis 1993



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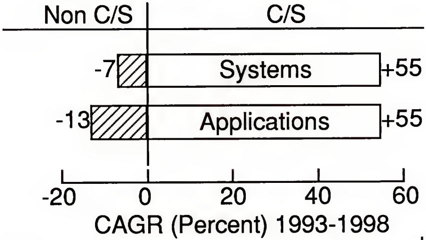
European Software Products Market Growth



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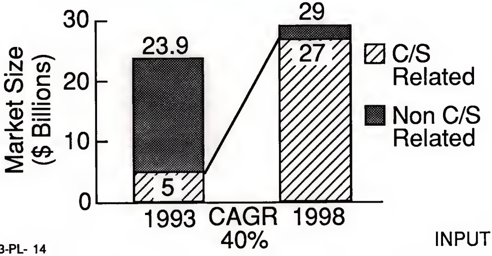
European Professional Services Market



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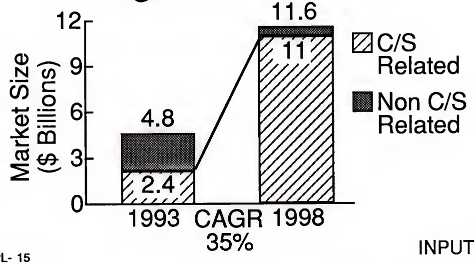
European Systems Integration Market



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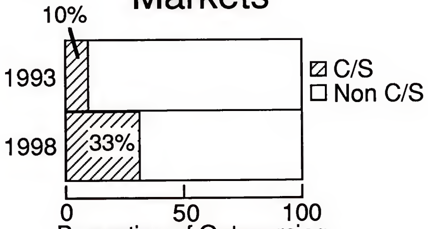
European Outsourcing Markets



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The European Information Services Industry—2000

- U.S. vendors strengthening market position
- Mid-sized firms challenged

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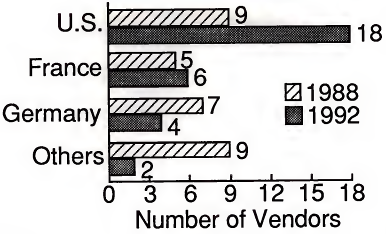
Top 30 Software Product Vendors Europe



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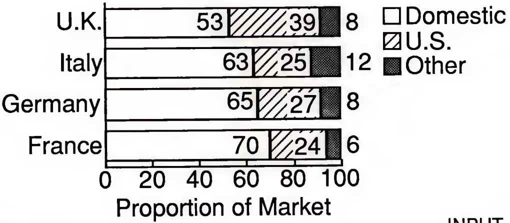
European Market Shares
Information Services 1992



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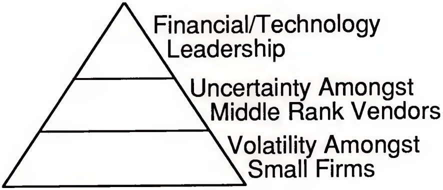
European Info. Services Industry Structure



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European Success Strategies Built on:

- U.S. products
- U.S. experience
- European resources

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PETER LINES
VICE PRESIDENT
MANAGING DIRECTOR

PROFILE

CAPABILITIES

- Peter Lines has twenty-five years of experience in the computer industry. He currently has responsibility for all of INPUT's European Programme research and custom consulting. He specializes in analysis and forecasting of major trends in the computer software and services business in Western Europe.

BACKGROUND

- With INPUT since 1983, Mr. Lines originally set up the Western European Market Analysis Programme for the computer software and services business. Subsequently he took management responsibility for all research in Europe, including INPUT's Customer Services Programme and custom consulting assignments. Mr. Lines became a Director of INPUT, Ltd. on the 1st January 1988.

- Prior to INPUT, he was with Sperry Computer Systems' U.K. subsidiary where he held a variety of posts, including those of Regional Software Support Manager, Regional Marketing Support Manager and Marketing Planning Manager.

- Mr. Lines commenced his career in the computer industry in 1966 with English Electric Computers (subsequently ICL), as a systems analyst.

EDUCATION

- B.Sc. (Economics), London School of Economics

Leading Vendors Client/Server Strategy

Peter A. Cunningham
President
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Tandem

Client/Server Strategy

- Fault tolerance and high availability for client/server (Himalaya Range)
- "Instant Information Everywhere"
- Client/Server as a customer service/customer delivery tool
- Shift away from proprietary systems

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Tandem

INPUT Analysis

- Fierce market ⟶ forced layoffs, hurt profits (Q3,'93)
- Himalaya Range must succeed
- UNIX-based OLTP focus for client/server strategically wise

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GUPTA

Client/Server Strategy

- Develop/market easy-to-use, scalable, open software
- Build on success in comprehensive PC-based systems
- Enhance compatibility through alliance programs (ISV, NCP)

MC3-DR-3

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Notes

GUPTA

INPUT Analysis

- Good products, smart market focus, successful results
- Support and marketing need improvement
- Comprehensive vision faces competition (Powersoft, KnowledgeWare)

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Andersen

Client/Server Strategy

- Business Integration (BI) philosophy
- Strategic partnering (BIP program)
- Comprehensive software/service provisions

MC3-DR-5

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Andersen

INPUT Analysis

- Powerful, dynamic tools (Foundation)
- Business Integration=intelligent, successful strategy
- Well positioned, focused for client/server

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EDS

Client/Server Strategy

- Match technology to customer business needs
- Help customers define/implement client/server solutions (Right Step Program)
- Explore/develop new client/server technology

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EDS

INPUT Analysis

- Multi-platform, multi-application expertise
- Deep understanding of business/industry needs
- Substantial experience and resources

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OpenVision

Client/Server Strategy

- Offer all-encompassing client/server system (OpenV*OPSS)
- "Customer-centric" service
- Strategic acquisition/alliance practices

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Notes

OpenVision

INPUT Analysis

- Young company, old experience (Mike Fields, Oracle)
- OpenV*OPSS not a "make-or-break" product
- Successful integration/ development of acquired products

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Microsoft

Client/Server Strategy

- Windows=fundamental client/server structure
- Develop and market for low- through high-end users
- Continuous development, end-user focus (Hermes, Cairo)

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Microsoft

INPUT Analysis

- Position=top end-user GUI vendor
- NT is ambitious, but not proven
- NT, HERMES focus of extreme competition

MC3-DR- 12

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Digital

Client Server Strategy

- Integrate technology, expertise, and industry focus
- New, comprehensive client/server services and business practices
- October 12, 1993—Over 170 new, C/S-focused products (Largest product announcement in Digital's history)

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Digital

INPUT Analysis

- Acting on the need to change
- Positioned to provide client/server to installed base, and new customers
- Intriguing, strategic product direction

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Intersolv

Client/Server Strategy

- Open applications development, regardless of platform mixture
- "Mix and match" hardware, networks, and software development
- Fast, cost-effective development to give customers competitive advantages

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Intersolv

INPUT Analysis

- Competitive player in applications development market
- Strategic alliances (ex. Powersoft, Digitalk) bolstering market presence, installed base
- Modular product strategy—avoiding problems of being "all encompassing" solutions vendor

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Powersoft

Client/Server Strategy

- LAN-focused applications development
- Client/Server Open Development Environment (CODE) partner program of alliances
- "Object Easy, SQL Smart, Windows Rich, MIS Friendly" product design

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Powersoft

INPUT Analysis

- One product company—risky position
- Strong competition—Gupta, KnowledgeWare, Microsoft
- PowerBuilder successful, but still evolving
- CODE program serving well

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Conclusions

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Conclusions

The best of times *IS* here,
for vendors who can:

- Deliver client/server solutions
- Achieve global presence
- Deliver open systems solutions
- Sell/consult at strategic levels

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Notes

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Conclusions

The best of times *IS* here,
for vendors who can:

- Provide software solutions on multiple operating systems
- Form alliances to expand client/server product scope, skill sets, market coverage

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Notes

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Conclusions

The best of times *IS* here,
for vendors who can:

- Build alternate delivery channels
- Provide customizable products
- Offer a continuum of services

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Conclusions

The best of times *IS* here, for vendors who can:

- Invest in sales training
  - Sales staff
  - Support staff

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Conclusions

The best of times *IS* here,
for vendors who can:

- Leverage their expertise
  - Vertical market
  - Technology/establish technology centers

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Avec INPUT, les Directions Générales, impliquées sur les marchés des technologies de l' information, prennent des décisions plus rapides et optimales. Depuis 1974, utilisateurs et fournisseurs bâtissent leurs réflexions stratégiques et engagent leurs actions à partir des données, analyses et recommandations délivrées par INPUT, société internationale spécialisée sur les marchés des logiciels et services.

N' attendez plus pour tirer parti, vous aussi, des connaissances et de l' expertise mondiale d' INPUT. Contactez-nous.

Programmes en souscription

- **Information Services Markets**
  - Données mondiales et nationales
  - Analyses par secteur d' activité
- **Systems Integration and Business Process Change**
- **Client/Server Applications and Directions**
- **IT Outsourcing Opportunities**
- **Information Services Vendor Profiles and Analysis**
- **EDI/Electronic Commerce**
- **U.S. Federal Government IT Markets**
- **IT Customer Services Directions**
- **Interactive Communications Services**
- **Multimedia Opportunities**

Composantes des programmes

- Etudes de marché (plus de 100 titres par an)
- Bulletins de recherche sur les principaux enjeux, tendances, ...
- Projections à 5 ans
- Analyse de la concurrence
- Accès aux experts consultants
- Hotline

Bases de données

- **Software and Services Market Forecasts Europe**
- **Software and Services Vendors**
- **U.S. Federal Government**
- **Commercial Application LEADS**

Etudes spécifiques

Pour les offreurs

- **Stratégie de marché**
- **Analyse d' opportunités**
- **Etude de satisfaction**
- **Positionnement**
- **Conseil en acquisition**

Pour les utilisateurs

- **Evaluation de fournisseurs**
- **Scenario d' outsourcing**
- **Opportunités de marché**
- **Aide à la planification**
- **Analyse comparée d' utilisateurs**

Autres services

- Présentations, conférences
- Conseil Fusion/Acquisition
- Recherche de partenaires
- Newsletters

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FOILS

European Opportunities in Client/Server Information Services

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Peter Lines

Director
INPUT—Europe

MC3-PL- 2

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European Client/Server Markets

- Economic/political environment
- User community impacts
- Five-year market forecasts
- Services industry—year 2000
- Strategies for success

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European Community
1993

- Shattered vision and economic difficulties create new environment for IT decisions

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European IT Users

- Demand client/server applications
- Require support and services
- Drive IT expenditure externally

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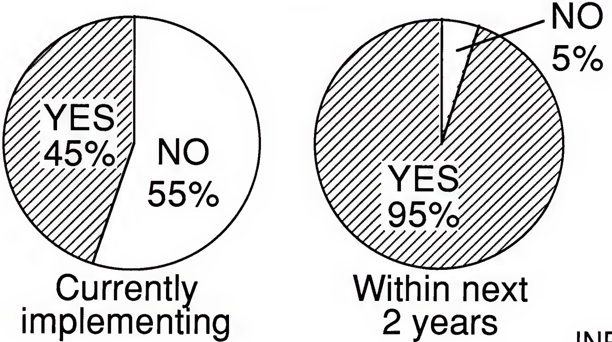
European Client/Server Implementation Plans



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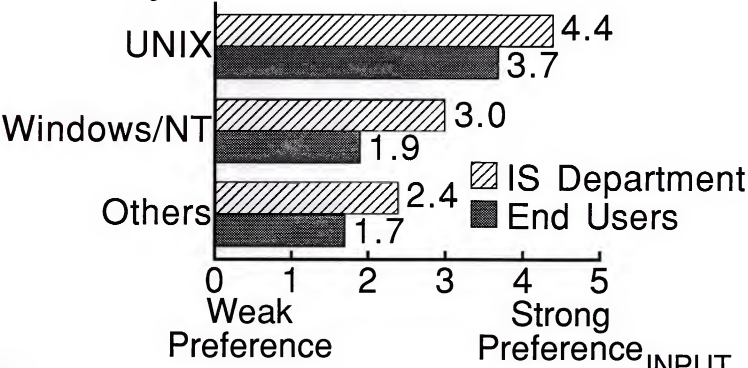
European Operating System Preferences



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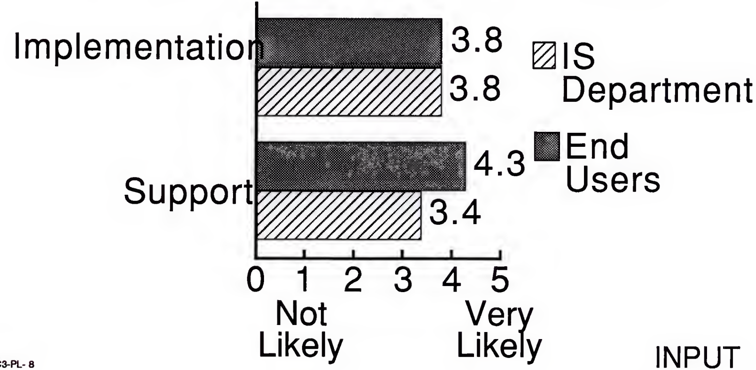
European User Need for Client/Server Services



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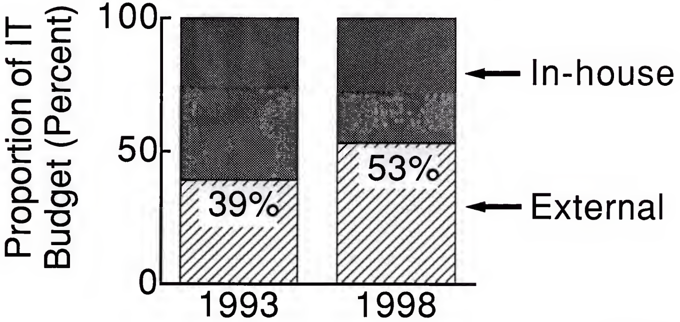
European IT Spending Changes



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European Client/Server Markets

- Software product brand leaders scale up
- Open competition for client/server projects
- Transition costs fuel outsourcing

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European Software and Services Market C/S Impact

Sector	1993-1998 CAGR (%)	1998 Market Proportion (%)
C/S	+43	65
Non C/S	-9	15

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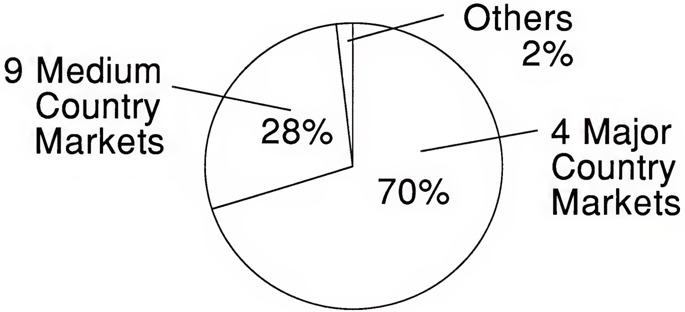
European Market Analysis 1993



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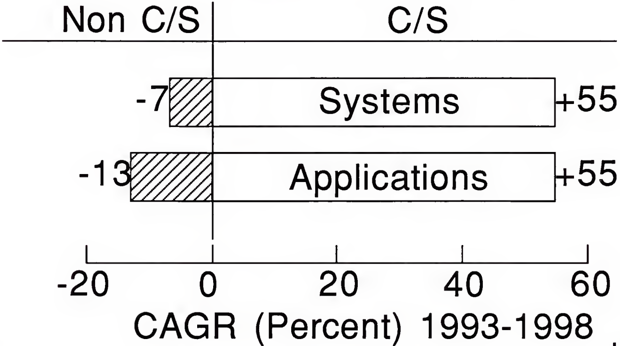
European Software Products Market Growth



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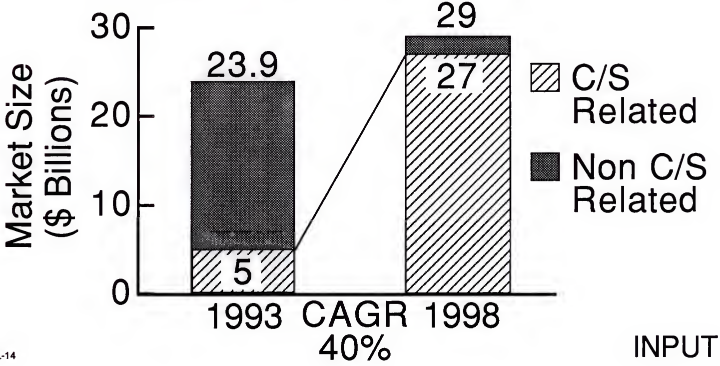
European Professional Services Market



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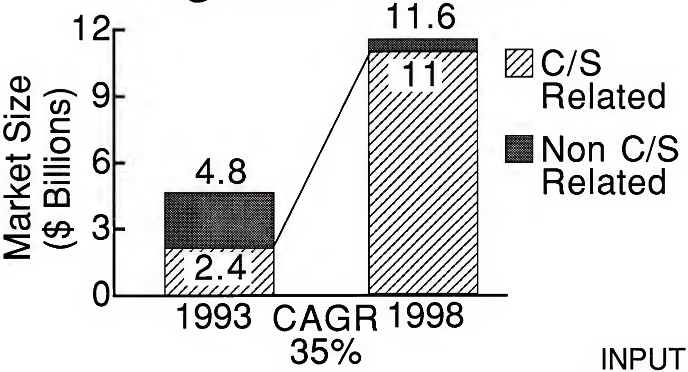
European Systems Integration Market



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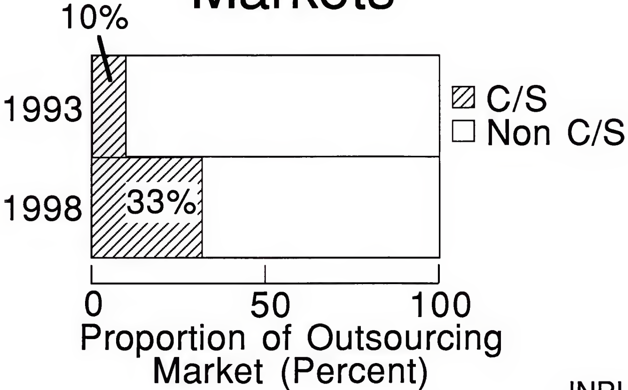
European Outsourcing Markets



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The European Information Services Industry—2000

- U.S. vendors strengthening market position
- Mid-sized firms challenged

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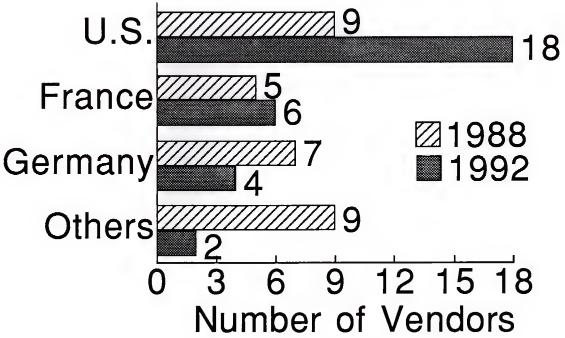
Top 30 Software Product Vendors Europe



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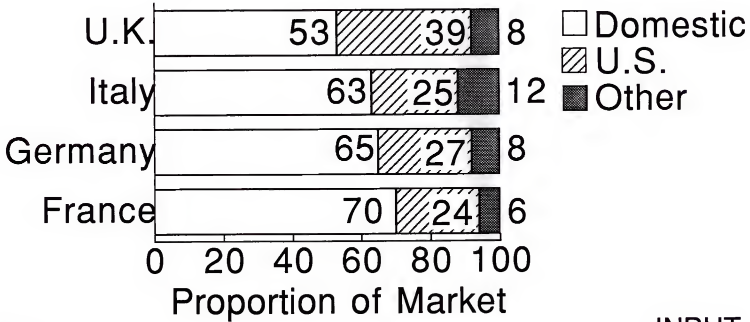
European Market Shares Information Services 1992



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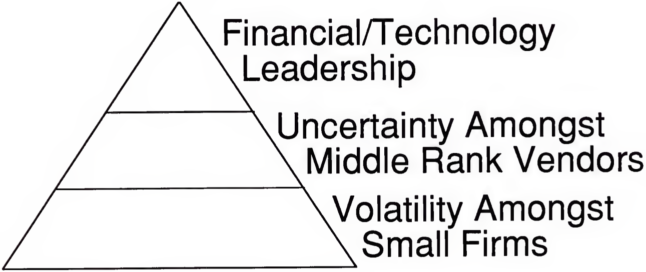
European Info. Services Industry Structure



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European Success Strategies Built on:

- U.S. products
- U.S. experience
- European resources

MC3-PL-21

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