

The Services Market and the User Revolution

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Roger Fulton
Software and Services
Programme Manager, Europe

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U.K.—17 Hill Street, London W1X 7FB, U.K.

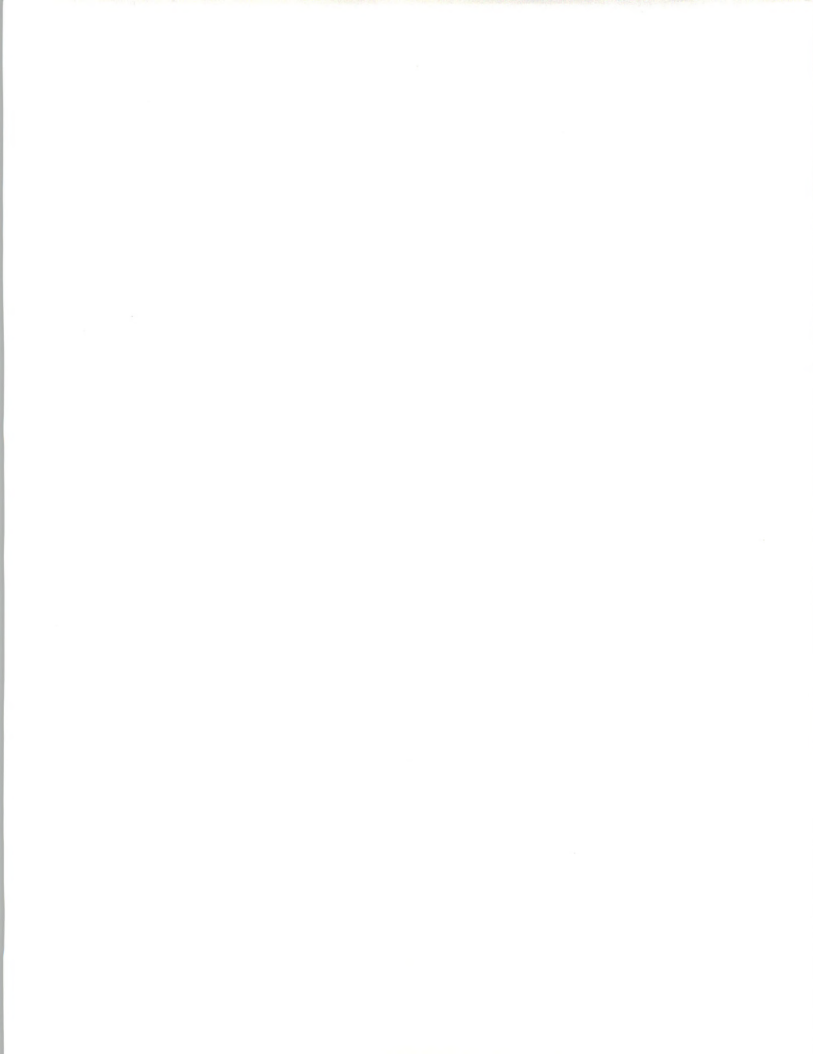
France—24, avenue du Recteur Poincaré, 75016 Paris, France

Germany—Sudetenstrasse 9, W-6306 Langgöns-Niederkleen, Germany

+44 71 493 9335

+33 1 46 47 65 65

+49 6447 7229



Researched by
INPUT
17 Hill Street
London W1X 7FB
United Kingdom

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**Information Services Market Analysis
Programme—Europe**
(IEU-MAP)

The Services Market and the User Revolution

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Agenda

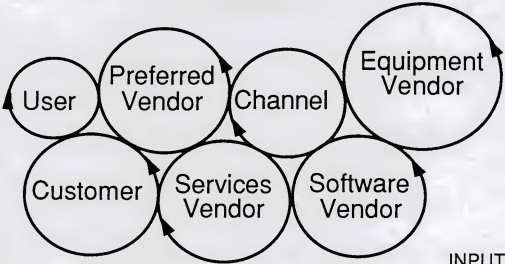
- IT Industry Revolution
- The New Software and Service Vendors
- Service Opportunities for Technology Change

E-IS-65

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Notes

IT Revolutions

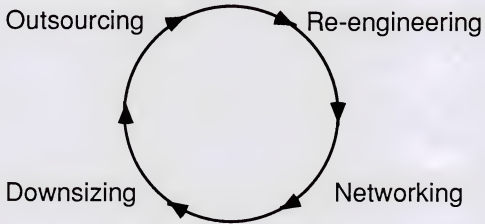


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Notes

Customer Revolution



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Notes

Customer Needs

- Results
- Solutions and tools
- Vendor responsibility
- Global and local support
- Business knowledge
- Simpler decisions

E-IS-68

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Notes

Preferred Vendors

Software Tools
Vendor

Database
Vendor

Hardware
Vendor

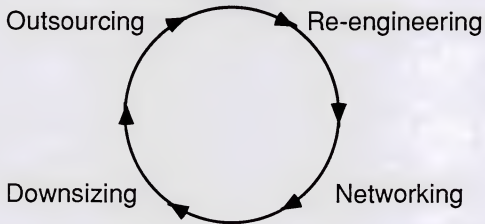
Full Service
Vendor

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E-IS-69

Notes

Vendor Revolution



E-IS-70

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Notes

Vendor Needs

- Face the customer
- Deliver business benefits
- Easier to buy and use
- Deliver services value
- Win market share
- Profit

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Notes

Vendor Roles

—	Operations
—	Solutions
—	Packaging
—	Technology

E-IS-72

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Notes

Channels

—	Operations
—	Solutions
—	Packaging
—	Technology

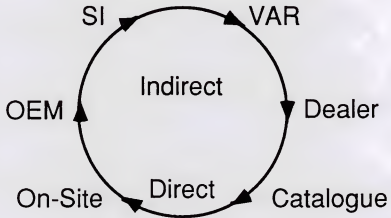
On-Site —————> Catalogue

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Notes

Channel Revolution

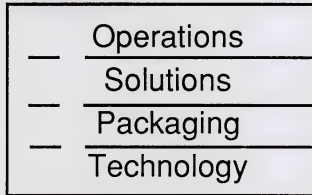


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Notes

IT Value Chain

Vertical
Integration

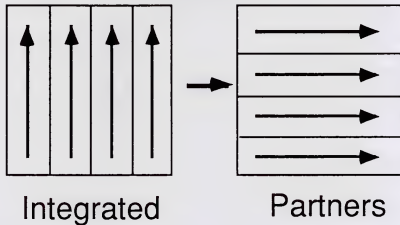


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Notes

Industry Restructuring

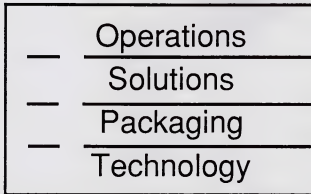


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Notes

Cultures



Support
Projects
Products



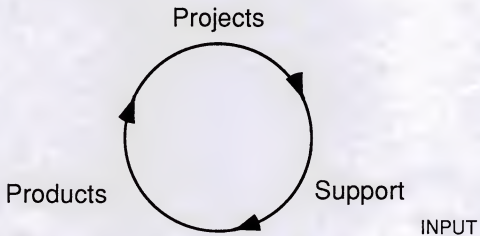
Custom \longrightarrow Commodity

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Notes

Integrated Services Co-working



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Notes

Metamorphosis of the Equipment Vendors

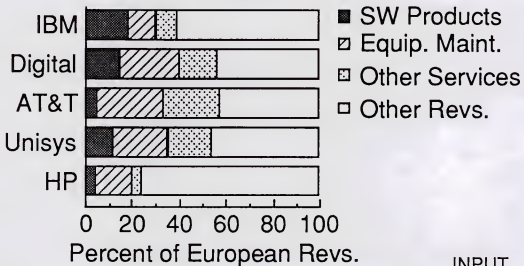
The Challenge from New
Services Competitors

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Notes

U.S. Equipment Vendors

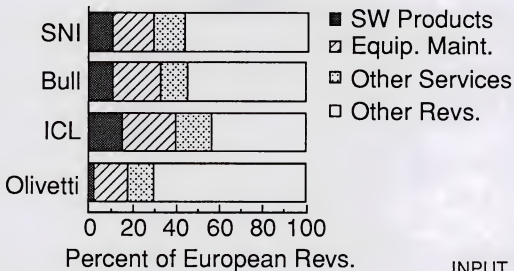


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Notes

European Equipment Vendors

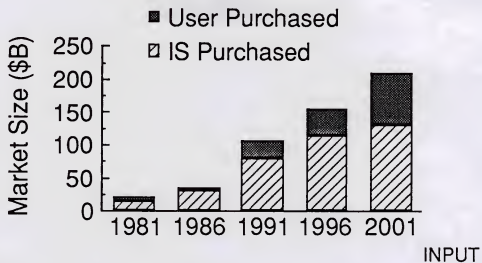


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Notes

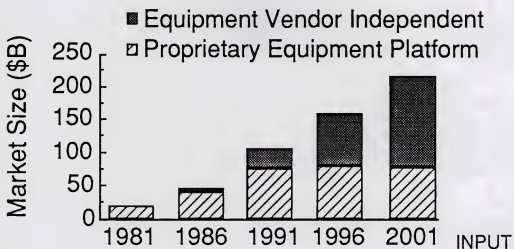
End-User Purchasing Trend



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Notes

Open Software and Service Trends



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Notes

Migrating to Standards

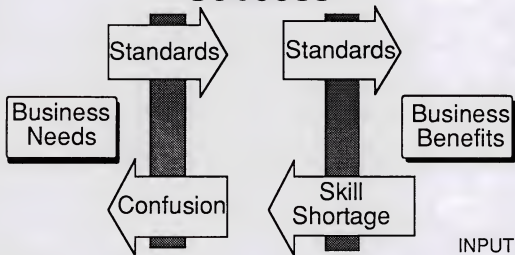
Skills Shortages Create Service Opportunities

E-PF-12

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Notes

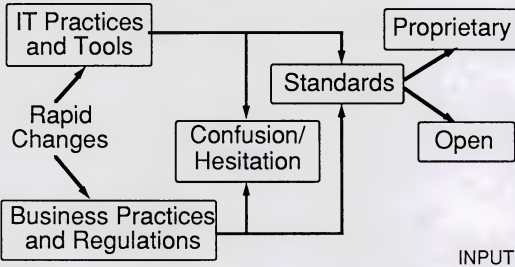
Barriers To Migration Success



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Notes

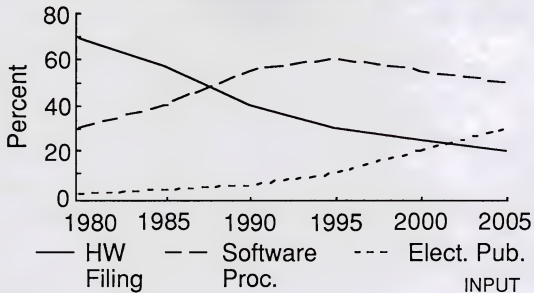
Drive Towards Standards



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Notes

Technology Market Shares

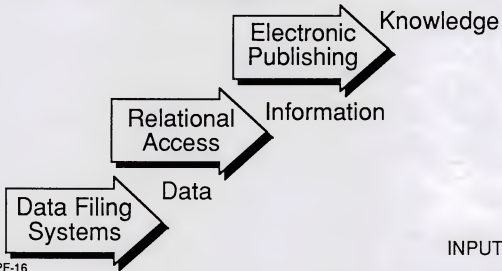


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Notes

Information Access Potential Demand Evolution



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Notes

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Distributed Data Types

Records Accounting
Inventory

Text

Sales
Notes
Letters
Documents

Graphics Charts

Maps
Drawings
Facsimile
Video
Pictures

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Notes

Distributed Data Types

Voice Messages
Annotations
Response

Other Programs
Knowledge Rules
Metadata

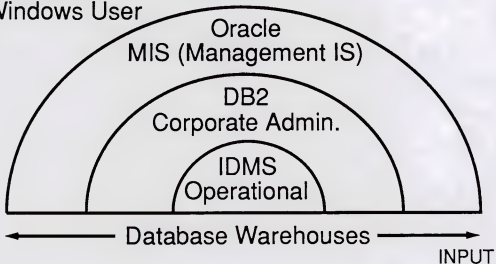
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Notes

Data Warehouse Strategy

MS Office for
Windows User



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Notes

Software Standards A Benefits Case Study

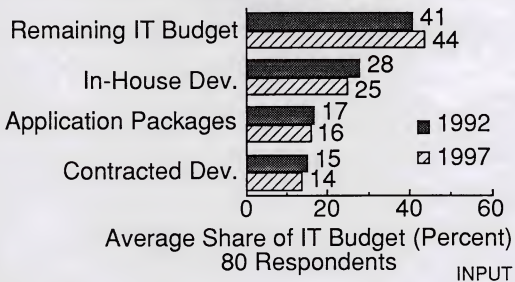
- Scalable duplicate applications
- Data centre consolidation
- Improved customer information
- Efficient in-house development
- Minimised duplicate efforts
- Real time executive information

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Notes

IT Budget Changes, Europe



E-PF-21

Notes

Recommended Migration Services

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

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Notes



The Key Industry Trends

- Revolution
- Metamorphosis
- Migration

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- 7 Cross-Industry Markets
- The Worldwide Market (30 countries)

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- Systems Integration
- Customer Services

- Outsourcing
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- Systems Integration

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- EDI/Electronic Commerce
- IT Vendor Analysis
- U.S. Federal Government
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INPUT WORLDWIDE

London — 17 Hill Street
London W1X 7FB, England
Tel. +71 493-9335 Fax +71 629-0179

Paris — 24, avenue du Recteur Poincaré
75016 Paris, France
Tel. +1 46 47 65 65 Fax +1 46 47 69 50

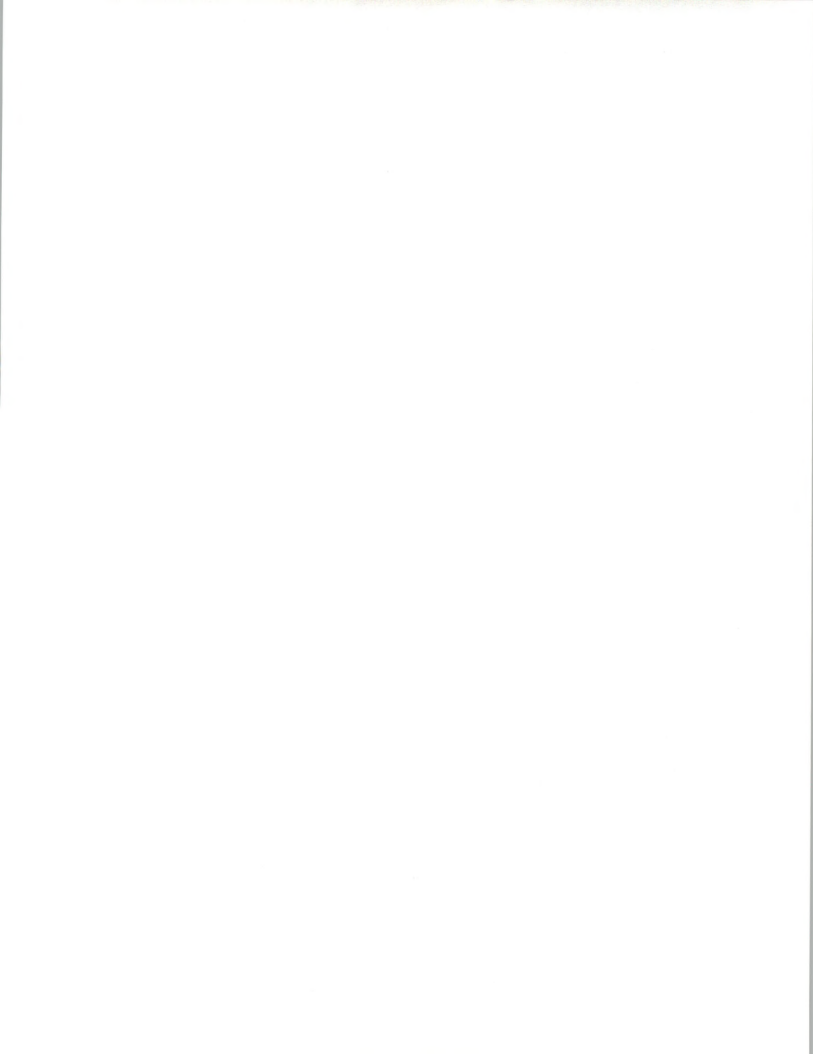
Frankfurt — Sudetenstrasse 9
W-6306 Langgöns-Niederkleen, Germany
Tel. + 6447-7229 Fax +6447-7327

San Francisco — 1280 Villa Street
Mountain View, CA 94041-1194
Tel. (415) 961-3300 Fax (415) 961-3966

New York — 400 Frank W. Burr Blvd.
Teaneck, NJ 07666
Tel. (201) 801-0050 Fax (201) 801-0441

Washington, D.C. — 1953 Gallows Rd., Ste. 560
Vienna, VA 22182
Tel. (703) 847-6870 Fax (703) 847-6872

Tokyo — Saida Building, 4-6
Kanda Sakuma-cho, Chiyoda-ku
Tokyo 101, Japan
Tel. +3 3864-0531 Fax +3 3864-4114



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