Western Europe
Applications Solutions Market

	CAGR (Percent)
Application Products	9.0 / 20.8 → 18
Turnkey Systems	12.3 / 24.3 → 15

■ 1991
□ 1996

User Expenditures ($ Billions)
Scale: 0 5 10 15 20 25
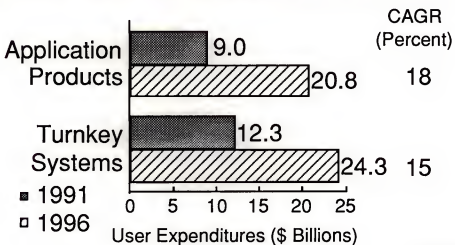
ESP- 1

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Notes

9/30/91

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Application Software Products, Western Europe

Leading Vendors. 1990

Company	Revenues ($M)	Mkt. Share (%)
IBM	340	4
Microsoft	250	3
Lotus	240	3
SAP	180	2
CA	170	2

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Notes

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Application Software Products, Western Europe

Equipment Platform Analysis

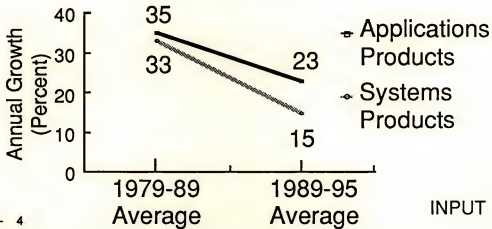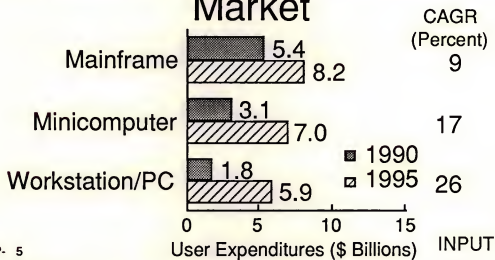| Subsector	User Expenditures ($ Billions)		
	1991	CAGR (%)	1996
Mainframe	1.0	3	1.2
Minicomputer	2.9	14	5.6
Workstation/PC	5.1	23	14.0

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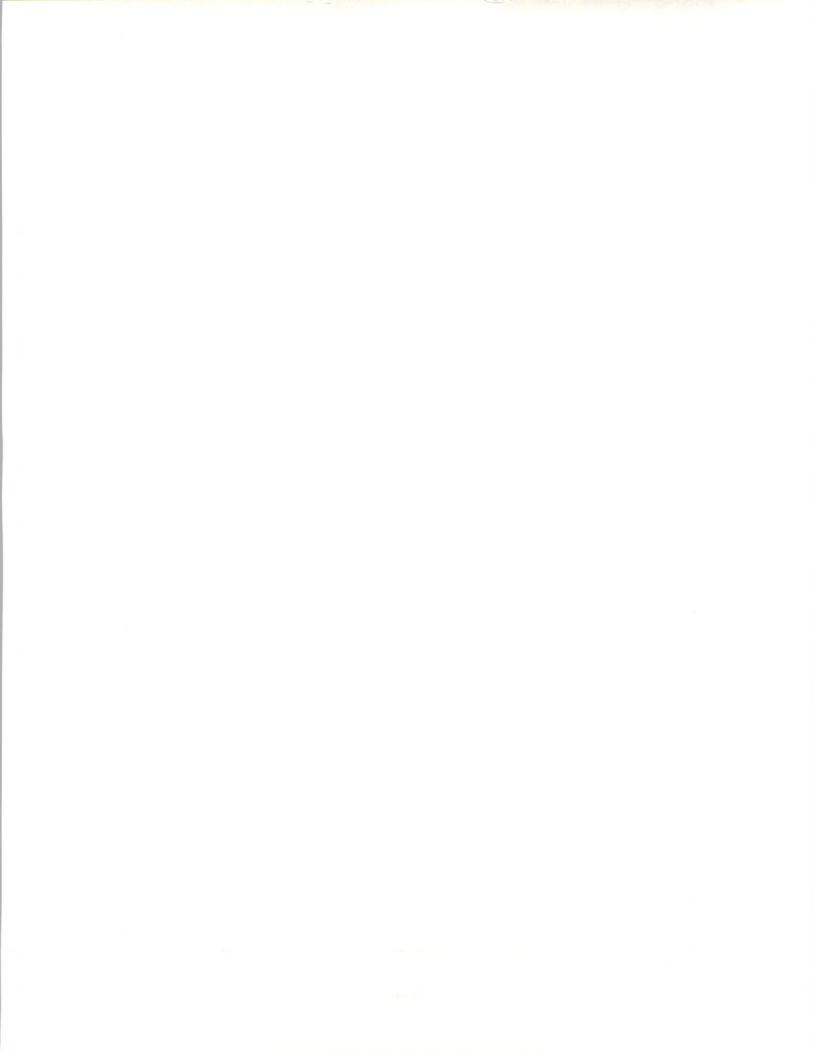
Systems Software Product Growth Declines in Western Europe

Notes

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Western Europe, 1990-1995

Systems Software Products Market
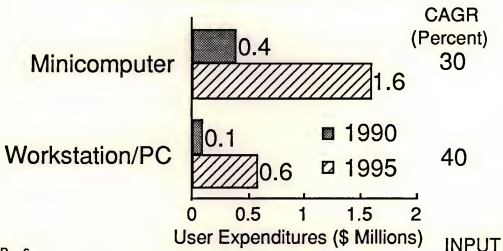
CAGR (Percent)

	1990	1995	CAGR (Percent)
Mainframe	5.4	8.2	9
Minicomputer	3.1	7.0	17
Workstation/PC	1.8	5.9	26

User Expenditures ($ Billions)

ESP- 5

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Notes

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Western Europe, 1990-1995

The Impact of UNIX

CAGR (Percent)

Minicomputer — 0.4, 1.6 — 30

Workstation/PC — 0.1, 0.6 — 40

■ 1990
▨ 1995

User Expenditures ($ Millions)

ESP- 6

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Notes

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Leading Vendors—Western Europe, 1989

Systems Software Products

Company	Mkt. Share (%)	Revenues ($ M)
IBM	25	2,255
Digital	8	700
Siemens	6	560
Bull	4	360
ICL	3	265

INPUT

Notes

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Leading Independent Vendors—W. Europe, 1989

Systems Software Products

Company	Mkt. Share (%)	Revenue ($M)
CA	2	215
Oracle	2	195
Software AG	2	155
Microsoft	1	85
Cincom	1	65

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Notes

5/1/91

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System Control Products Market

		CAGR (Percent)
Mainframe	2.4 / 3.4	8
Minicomputer	1.2 / 2.4	15
Workstation/PC	0.8 / 1.8	20

■ 1990
□ 1995

0   5   10   15

User Expenditures ($ Billions)

ESP- 9

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Notes

5/1/91

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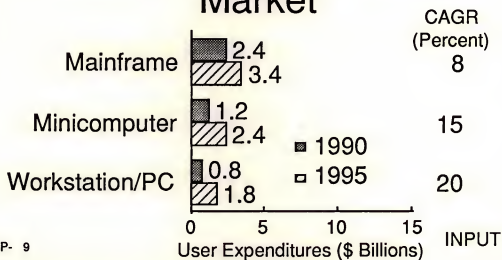
Western Europe, 1990-1995

Operations Management Tools Market

CAGR
(Percent)

Mainframe	1.4 / 2.3	10
Minicomputer	0.7 / 1.5	18
Workstation/PC	0.1< / 0.5	41

■ 1990
□ 1995

0   5   10   15

User Expenditures ($ Billions)

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Notes

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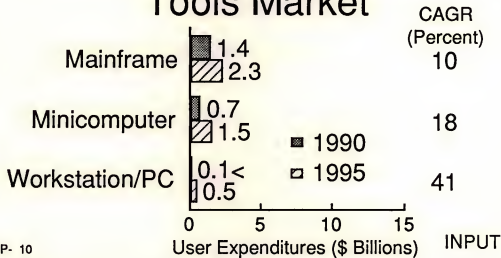
Western Europe, 1990-1995

Application Development Tools Market

	CAGR (Percent)
Mainframe	1.6 / 2.6	11
Minicomputer	1.3 / 3.1	19
Workstation/PC	1.0 / 3.6	29

■ 1990
▨ 1995

User Expenditures ($ Billions)

0   5   10   15

ESP- 11

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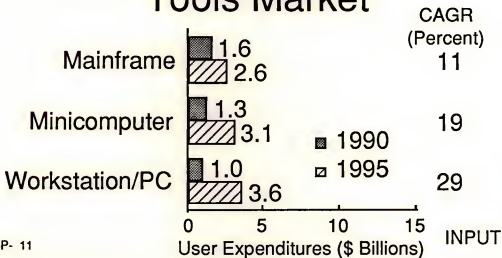
Notes

Western Europe, 1990-1995
Application Development Product Opportunities

	User Expenditures ($ Billions)	CAGR (Percent)
DBMS	2.0 / 4.3	16
4GL	0.6 / 1.4	20
CASE	0.2 / 1.4	42

■ 1990
▨ 1995

ESP- 12

Notes

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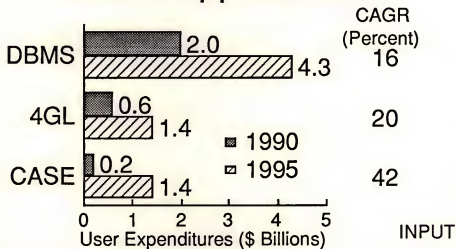
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Application Software Products, Western Europe

Country Markets

Country	User Expenditures ($ Billions)		
	1991	CAGR (%)	1996
France	2.3	20	5.9
Germany	1.5	18	3.4
United Kingdom	1.3	14	2.6
Italy	1.3	16	2.7

ESP- 13

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Notes

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SAP

Heritage	Mainframe-based accounting software
Strengths	Level of functionality German client base
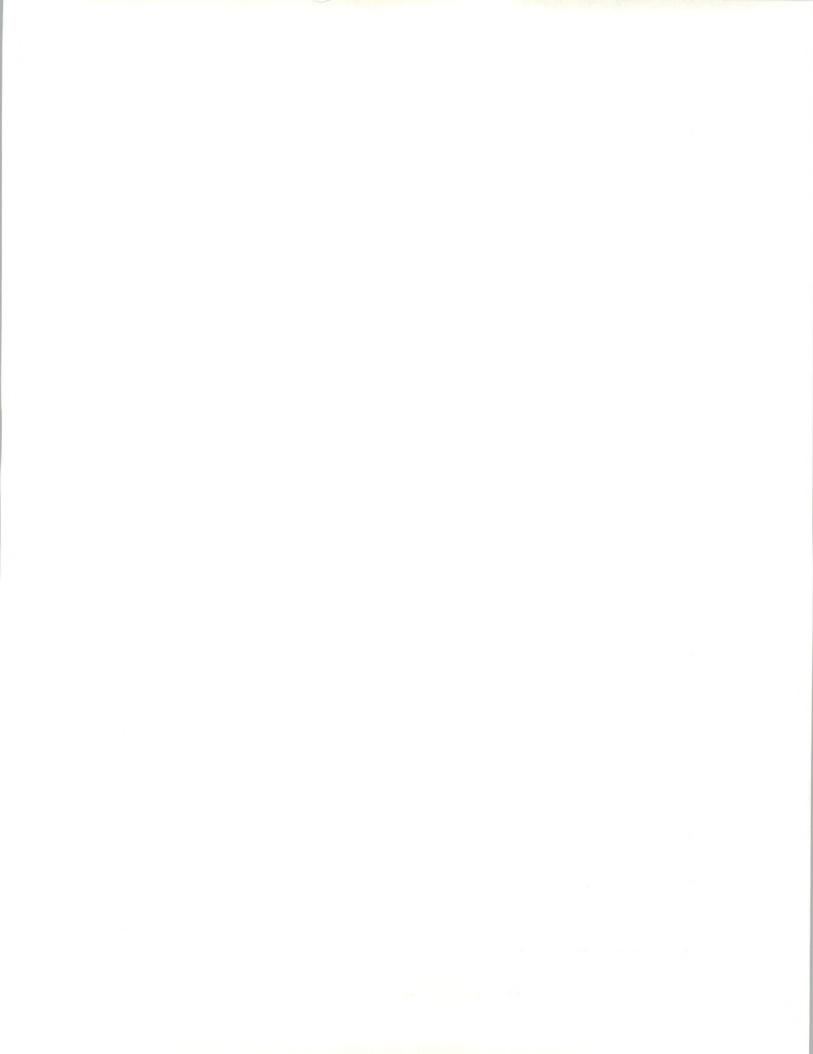
Notes

SAP

Focus	Developing midrange market New technology
Direction	UNIX and AS/400 Increased global presence

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Notes

9/30/91

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