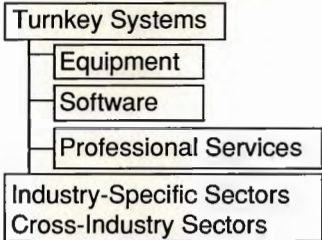


Turnkey Systems/ VARs

TS-1

Notes

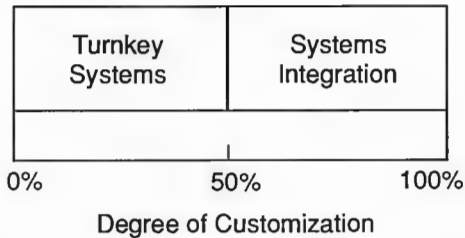
Turnkey Systems Market Structure



TS-3

Notes

The Customization Spectrum



TS-4

INPUT

Notes

Similarities Between System Integrators and Turnkey Systems

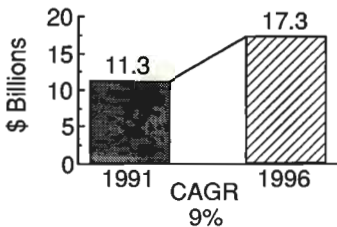
- Prime contractors role
- Multiple vendors involved
- Equipment delivery
- Software customization
- Installation, training, and support

TS-7

INPUT

Notes

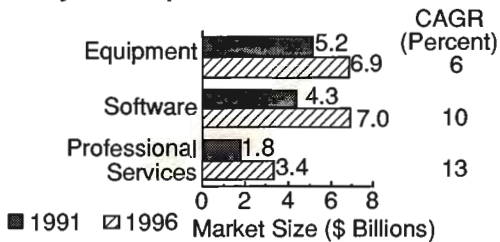
U.S. Turnkey Systems Market, 1991-1996



TS-10

Notes

U.S. Turnkey Systems Market by Component, 1991-1996



TS-11

Notes

Turnkey Systems Driving Forces

- Downsizing
- Emphasis on solutions
- Aggressive VAR recruitment efforts
- Infusion of new products
- Systems and network integration needs

TS-30

Notes

Turnkey Systems Growth Inhibitors

- Weak economy
- Declining hardware margins
- Competition from alternative channels
- Vendors/VARs exiting

TS-31

Notes

Opportunities in the 1990s Turnkey/VARs

- Telecommunications
- LAN integration
- Distributed applications
- Downsizing
- Services versus software
- UNIX-based applications

TS-16

INPUT

Notes

Vendor Strategies

Increase typical system size/price

- Enhance product offering
- Sell larger systems

Expand industry coverage

- Related opportunities within current industry
- New/additional industry markets

INPUT
MPRE-81

Notes

Expanding Services

Provide new/additional services

- Consulting
- Customized programming
- Additional training/education
- Data-center management

INPUT
MPRE-82

Notes

Major Vendors' Shares of Turnkey Systems Market—1990

Company Name	Market Share (%)*
Intergraph	5
Mentor Graphics	2
Reynolds & Reynolds Company (The)	2

*INPUT estimates

TS-21

Notes



Major Vendors' Shares of Turnkey Systems Market—1990

Company Name	Market Share (%)*
Schlumberger	1
Gerber Scientific	1
Triad	1

* INPUT Estimates

TS-23

Notes

