

# Asia/Pacific

AP-1

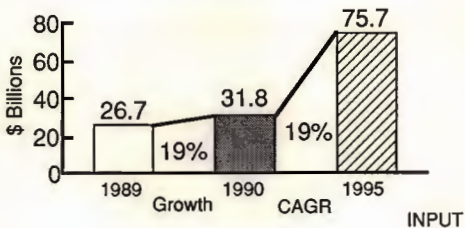
INPUT

Notes



Asia/Pacific

## Market Forecast



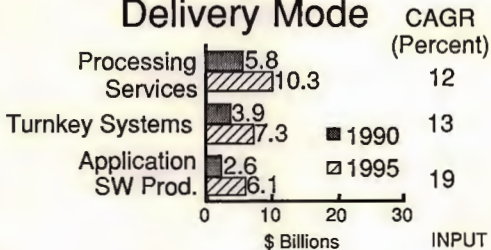
AP-2

Notes



Asia/Pacific

## Market Forecast by Delivery Mode



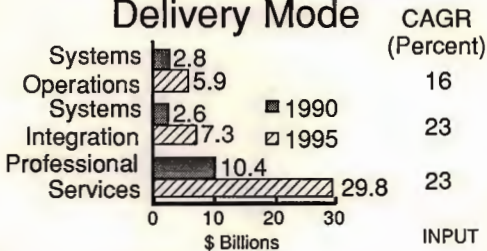
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Notes



Asia/Pacific

## Market Forecast by Delivery Mode



AP-4

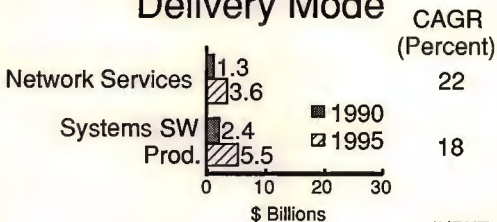
Notes





Asia/Pacific

## Market Forecast by Delivery Mode



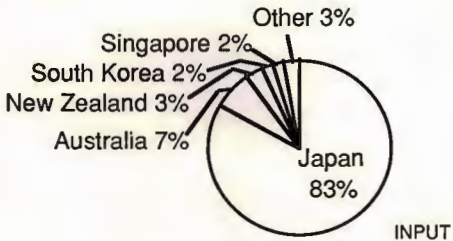
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Notes



Asia/Pacific

## Market Distribution



AP-6

Notes



Asia/Pacific

## Driving Forces/Inhibitors

- Strong economic growth
- Improving labor skills
- Nationalism
- Political stability varies
- Technology value recognized
- Small size of many markets

AP-7

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Notes



Asia/Pacific

## Market Entry Considerations

- Diversity of region
- Alliances required
- International competitors
- Vendor stability—foreign and local
- Long-term view essential

AP-8

INPUT

Notes





Asia/Pacific

## Areas of Opportunity

- Applications software products
  - CASE
  - Industry-specific—PC-based
- Turnkey systems—mini & PC

AP-9

INPUT

Notes



Asia/Pacific

## Areas of Opportunity

- Systems integration & operations
  - Emerging markets
- Professional services—tied to software products
- New technology—transfer of skills

AP-10

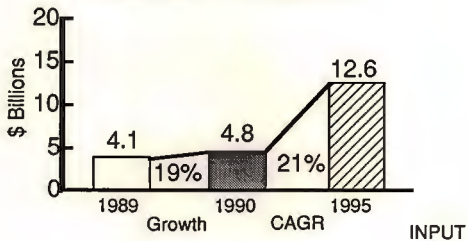
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Notes



Asia/Pacific (Excluding Japan)

## Market Forecast



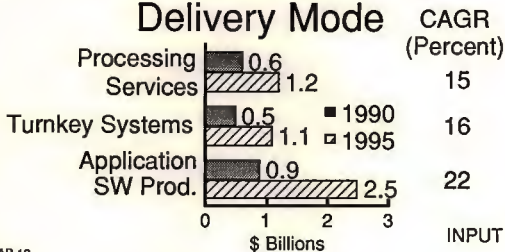
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Notes



Asia/Pacific (Excluding Japan)

## Market Forecast by Delivery Mode



AP-12

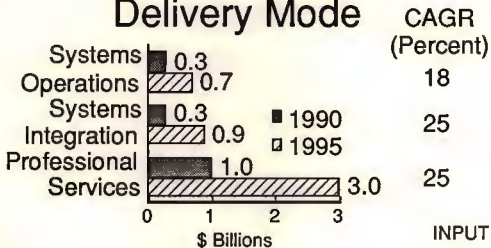
Notes





Asia/Pacific (Excluding Japan)

## Market Forecast by Delivery Mode



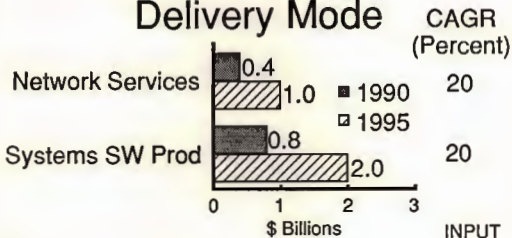
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Notes



Asia/Pacific (Excluding Japan)

## Market Forecast by Delivery Mode



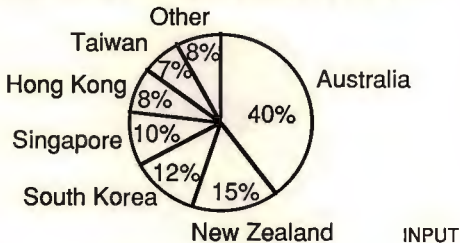
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Notes



Asia/Pacific (Excluding Japan)

## Market Distribution, 1990



AP-15

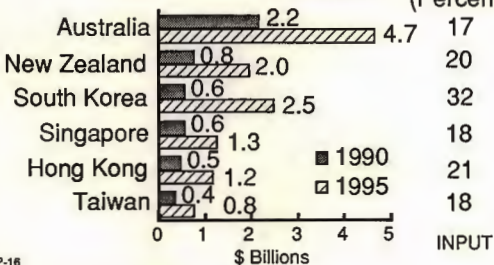
Notes



Asia/Pacific (Excluding Japan)

# Market Forecast

CAGR  
(Percent)



AP-16

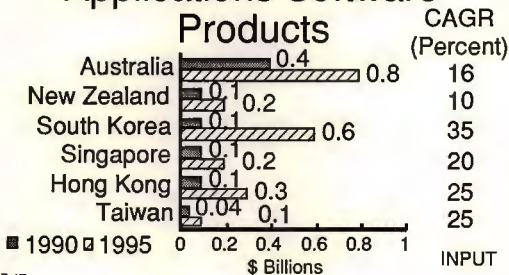
Notes





Asia/Pacific (Excluding Japan)

## Applications Software Products



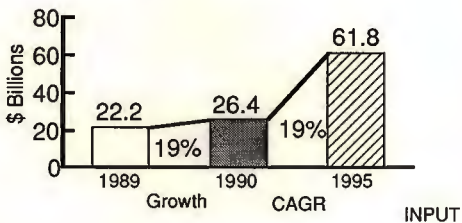
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Notes



Japan

## Market Forecast



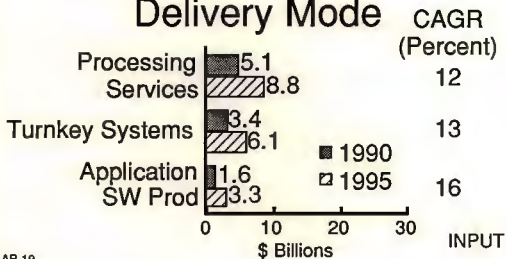
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Notes



Japan

## Market Forecast by Delivery Mode



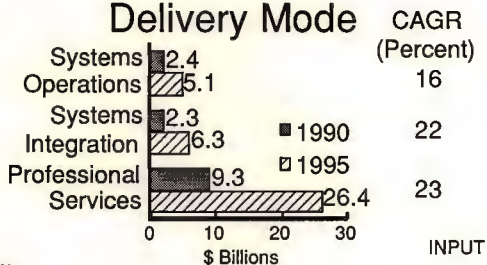
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Notes



Japan

## Market Forecast by Delivery Mode



AP-20

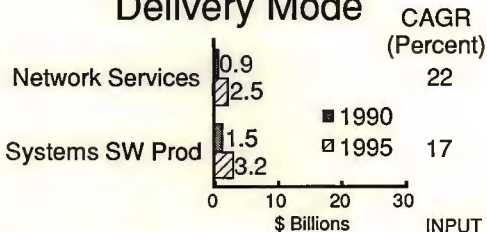
Notes





Japan

## Market Forecast by Delivery Mode



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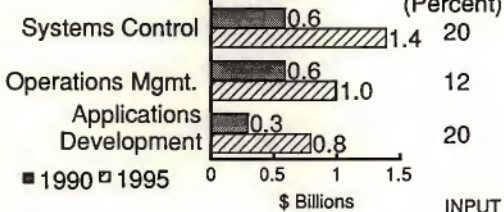


Japan

## Systems Software Products

### Forecast

CAGR  
(Percent)



AP-22

Notes



Japan

## Leading Information Services Vendors

Company	1989 Revenue (\$ U.S. Billions)
NTT Data	2.2
Nomuro Research	0.8
Hitachi IS	0.7

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Notes



Japan

## Leading Information Services Vendors

Company	1989 Revenue (\$ U.S. Billions)
CSK	0.5
Japan Research	0.5
Hitachi Software	0.4

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Notes





Japan

## Driving Forces

- Office automation
- Governmental investment/incentives
- Worldwide opportunities
- Software is an enabler of capabilities

AP-25a

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Notes



Japan

## Driving Forces

- Culture
- Language inhibits foreign vendors
- Customized versus packaged software

AP-25b

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Notes



Japan

## Market Entry Considerations

- High cost of entry
- Long-term view essential
- Kanji language
- Native representation essential

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Notes



Japan

## Areas of Opportunity

- Applications Software Products
  - Less than 10% purchased
  - CASE/RDBMS
  - DSS/EIS/Project Mgmt.

AP-27

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Notes





Japan

## Areas of Opportunity

- License agreements
  - Local translation
  - Local marketing

AP-28

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Notes

