

# secrets of software

## SUCCESS -

Management Insights from 100  
companies Around the world in  
one of the Most Dynamic Industries

ITAA webcast

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February 8, 2000

## **ITAA WEBCAST, FEBRUARY 8, 2000**

Introduction to Secrets of Software Success

Industry structure and history

Illustration of selected best practices

Future trends

Discussion

## ITAA WEBCAST, FEBRUARY 8, 2000

### ➡ Introduction to Secrets of Software Success

Industry structure and history

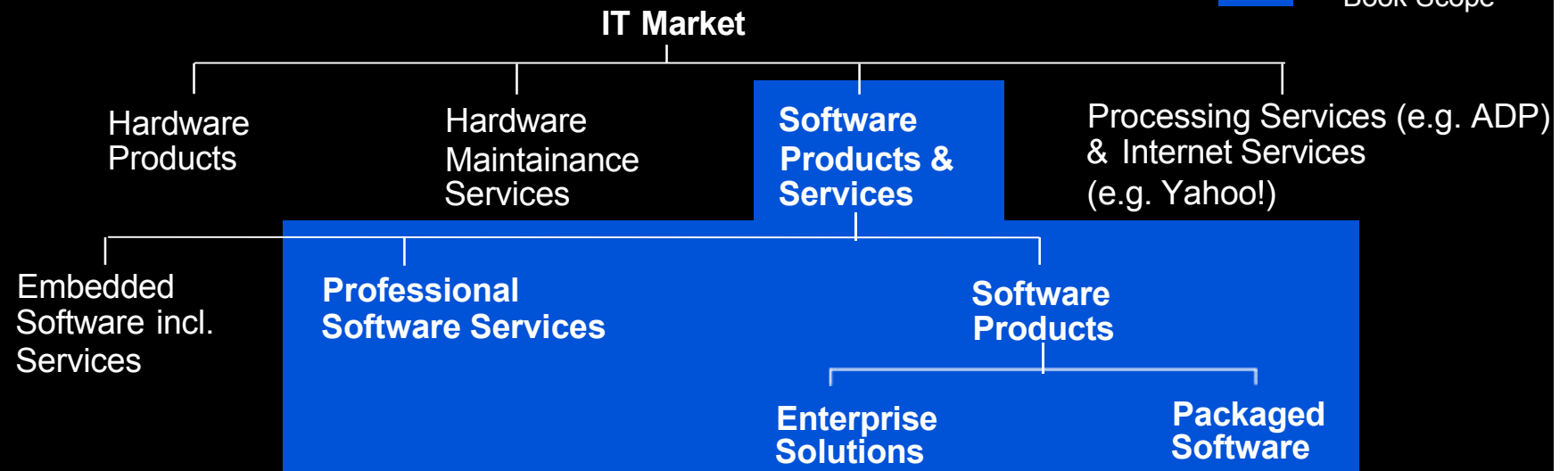
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# TOP TEN PLAYERS PER SEGMENT

Survey and Book Scope



	Revenues <sup>1</sup>	\$ m	Revenues <sup>2</sup>	\$ m	Revenues <sup>2</sup>	\$ m
<b>Top ten players in each segment</b> (1997 estimated revenues in specific segments)	1. Andersen Consulting	5,300	1. IBM	10,270	1. Microsoft	11,600
	2. IBM	4,920	2. Oracle	4,260	2. IBM	2,560
	3. EDS	3,750	3. Computer Associates	3,240	3. Computer Associates	1,080
	4. CSC	3,510	4. SAP	2,360	4. Adobe	760
	5. Science Applications	1,910	5. HP	2,190	5. Novell	710
	6. Cap Gemini	1,620	6. Fujitsu	1,810	6. Symantec	550
	7. HP	1,520	7. Hitachi	1,270	7. Intuit	520
	8. DEC	1,410	8. Parametric Technology	760	8. Autodesk	420
	9. Fujitsu	1,370	9. Peoplesoft	700	9. Apple	380
	10. BSO Origin	1,320	10. Siemens	680	10. The Learning Company	350
	<u>26,630</u>		<u>27,540</u>		<u>18,930</u>	

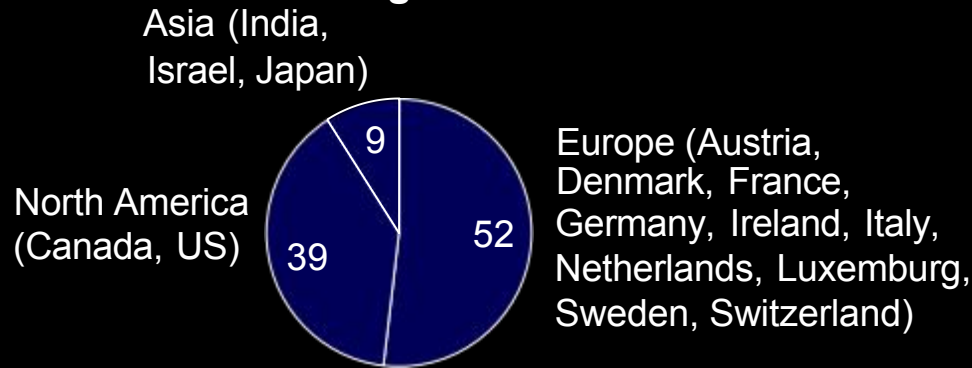
<sup>1</sup> Worldwide professional software services revenues

<sup>2</sup> Worldwide software licenses and maintenance/support revenues

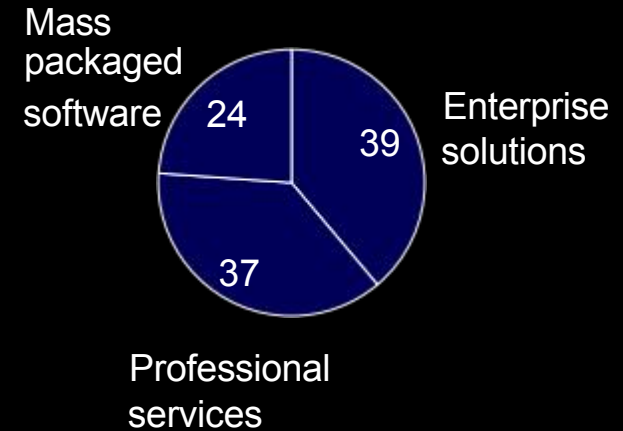
Source: IDC, McKinsey database, McKinsey analysis

# DISTRIBUTION OF PARTICIPATING COMPANIES

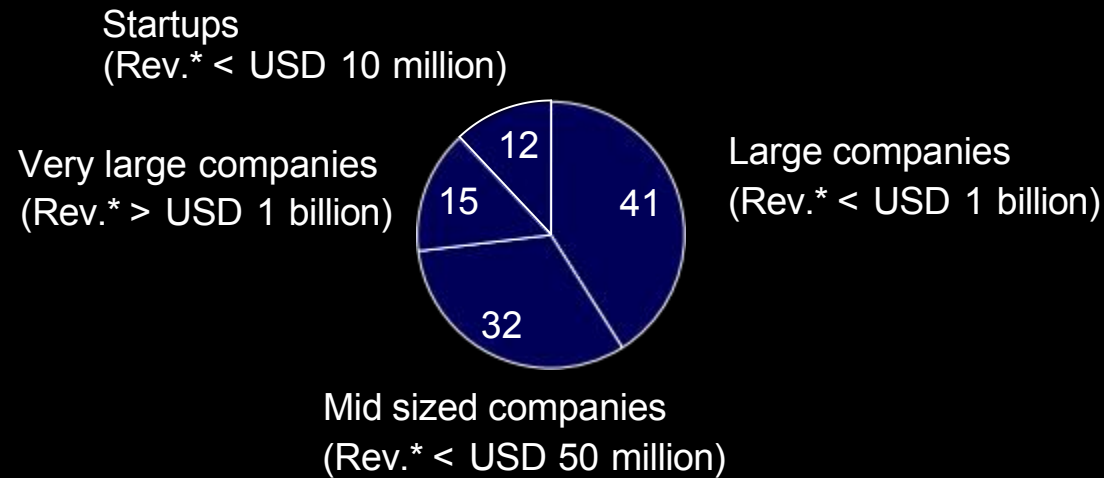
## Region



## Business type



## Size



# SCOPE AND METHODOLOGY OF SURVEY

## Interview partners

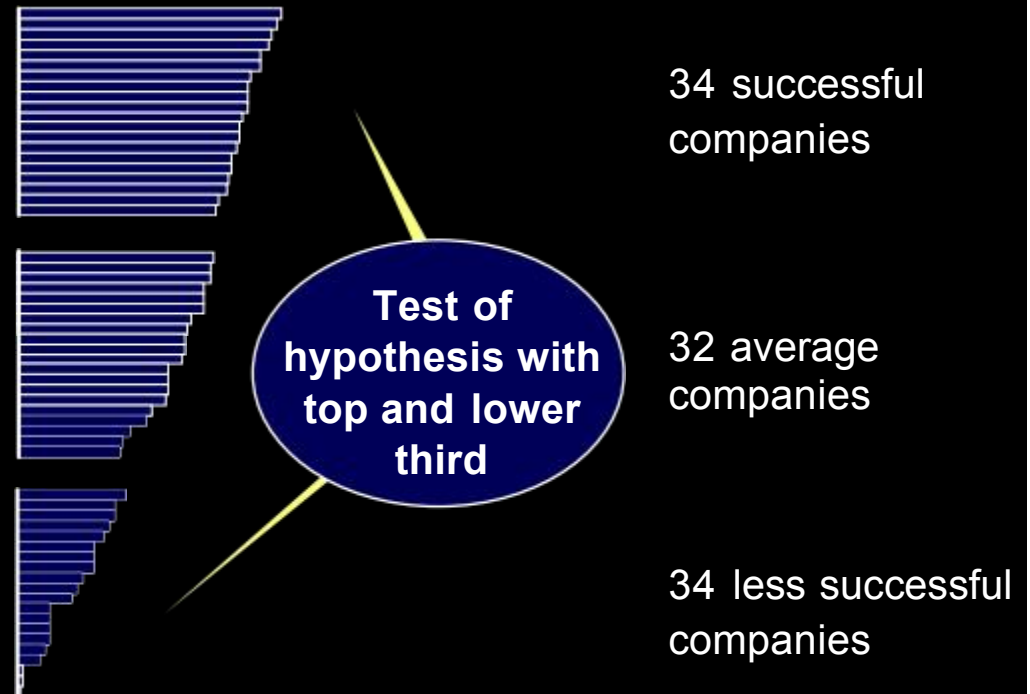
During the survey we did interviews with ...

- ... more than 450 executives
- ... 100 companies in 15 countries on 3 continents
- ... 6 of the 10 largest software companies in the world
- ... firms of all 3 industry segments



## Research methodology

Rank of companies by margin and CAGR\*



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