

## IT Services Market Share

### GLOBAL (US\$Bn, 2001)\*

Rank	Company	Sales	Share
1	Company a	35.0	6.4%
2	Company b	21.5	4.0%
<b>3</b>	<b>Fujitsu</b>	<b>12.4</b>	<b>2.3%</b>
4	Company c	11.6	2.1%
5	Company d	11.3	2.1%

\*Source: Gartner Dataquest July 2002  
(GJ02528)

### JAPAN (¥Bn, 2000)\*

Rank	Company	Sales	Share
<b>1</b>	<b>Fujitsu</b>	<b>977.4</b>	<b>13.4%</b>
2	Company A	720.9	9.9%
3	Company B	678.5	9.3%
4	Company C	630.3	8.6%
5	Company D	516.2	7.1%

\*Source: Gartner Dataquest March 2002

# Services & Software Business Composition

## From Consulting and Systems Integration to Operation and Maintenance

Market Segments		Characteristics
<b>Solutions, Systems Integration</b>		<ul style="list-style-type: none"> <li>•Enhanced consulting capabilities from synergies between Accenture's management consulting strengths and Fujitsu's IT consulting expertise</li> <li>•Pioneered packaged services offerings in Japan 10 years ago; 6,000 services products now</li> <li>•Strength in high-quality, high-reliability large-scale systems</li> </ul>
<b>Infra-structure Services</b>	<b>Managed Services</b>	<ul style="list-style-type: none"> <li>•System Operations Management</li> <li>•Support Desk</li> <li>•Security Services</li> <li>•Maintenance</li> </ul>
	<b>Network Services</b>	<ul style="list-style-type: none"> <li>•Outsourcing Services</li> <li>•Network Services (B-FENICS, @nifty, etc.)</li> </ul>
	<b>Middleware</b>	<ul style="list-style-type: none"> <li>•Collaborative Business Integration (Interstage)</li> <li>•Operations Management Software (Systemwalker)</li> <li>•Database (SymfoWare)</li> </ul>
		<ul style="list-style-type: none"> <li>•Full range of HW/SW support, from maintenance to operations monitoring and security, with largest number of systems support personnel and offices in Japan</li> </ul>
		<ul style="list-style-type: none"> <li>•1,200 Outsourcing customers</li> <li>•70,000 ASP services users</li> <li>•50,000 B-FENICS customers</li> <li>•5.2M ISP subscribers (@nifty - Japan's largest ISP)</li> </ul>
		<ul style="list-style-type: none"> <li>•Middleware to support customers' systems</li> </ul>

# Services & Software Market Position in Japan

Rank	Solutions/ Systems Integration	Managed Services	Outsourcing	Total
1	<b>Fujitsu</b>	<b>Fujitsu</b>	IBM Japan	<b>Fujitsu</b>
2	HITACHI	NEC	<b>Fujitsu</b>	HITACHI
3	NTT Data	HITACHI	HITACHI	NEC
4	NEC	IBM Japan	NTT Data	NTT Data
5	IBM Japan	NTT Data	NEC	IBM Japan

Source : Fujitsu Analysis (excludes middleware)

# Competitive Strengths in Services & Software

	<b>Strengths</b>
<b>Customer Base</b>	<ul style="list-style-type: none"> <li>•Largest base of users in Japan 170,000 customers; 4,000 corporate mainframe users</li> </ul>
<b>Products/ Services</b>	<ul style="list-style-type: none"> <li>•Comprehensive lineup of solutions offering PROPOSE: 6,000 industry- and business-specific offerings GLOVIA: World-class ERP package (installed on 5,600 systems worldwide)</li> <li>•Most widely recognized ASP vendor in Japan (IDC Japan xSP market survey results)</li> </ul>
<b>Organization</b>	<ul style="list-style-type: none"> <li>•Large global corps of Services &amp; Software professionals Japan: 86,000 (largest in nation) Fujitsu: 9,000 Group Companies (49 companies): 27,000 FCA/FSA*: Two associations comprising 200 companies developing software and services in cooperation with Fujitsu, 50,000 technical staff Overseas: 24,000</li> </ul>
<b>Support</b>	<ul style="list-style-type: none"> <li>•Nationwide network of local support offices                             <ul style="list-style-type: none"> <li>-Largest support business revenues in Japan</li> <li>-Largest number of systems support personnel in Japan (approx. 10,000)</li> <li>-Approx. 1,000 support offices</li> </ul> </li> </ul>

Note: FCA is largest association of IT services companies in Japan; FSA is only manufacturer-affiliated association of software companies in Japan.

## ■ Our specialists are certified to handle a wide array of business needs.

- IT coordinators, Project Management Professionals, SAP consultants, Oracle-certified specialists
- Fujitsu-certified GLOVIA and Interstage consultants

## ■ We develop IT professionals through in-house certification programs.

- **Consultants:** Assess customer's business environment and offer solutions.
- **Project Managers:** Responsible for project planning and execution.
- **IT Architects:** Specialize in system methodology design and solutions creation.