

Portia Isaacson Wright, Ph.D.

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The newsletter for users of published market information in the computer, telecommunications, electronics and office products industries.

Future Thinker is dedicated to executives who plan the future using the best information they can buy.

FUTURE THINKER

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A FEW WORDS

Companies Complete, Live Lives and a Creativity Exercise for You

Companies Complete

Future Think Companies is complete. We're tired, but happy. It's the first ever compilation and indexing of market information publishing companies in the information technology industry. We admit it — we way underestimated the effort required. But we are very proud of the end result. *Future Thinker* subscribers will receive their copy in January. If you're not a subscriber, it's \$195.

Live Lives

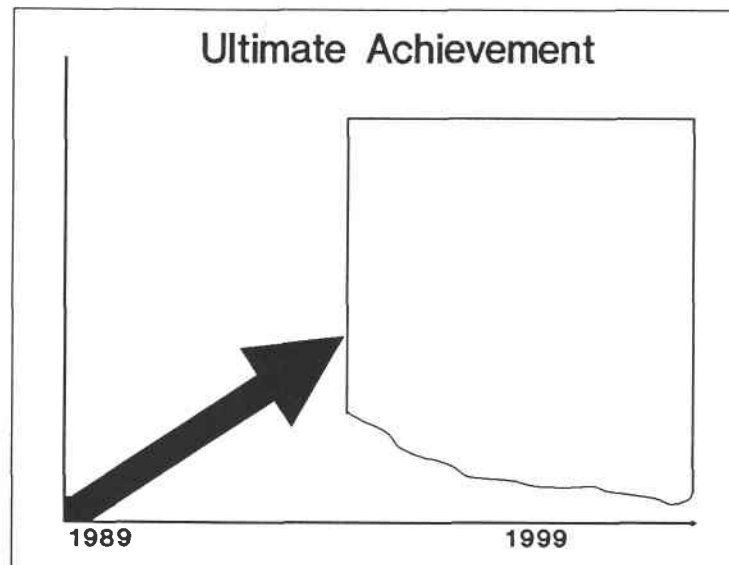
Call for a brochure

Future Think Live is my new one-day seminar about the future of information technology. It's not like any seminar you're ever attended before. We're holding it in Colorado Springs (do you ski?), Silicon Valley, and Dallas in early 1989. And I'll do a *Live* in your company, for your customers, distributors, or whatever. It's fun, creative, and packed with information about the future to help you make decision today. See back cover.

Many of us start the new year by looking at our goals. Try using this chart to state your (or your company's) ultimate achievement in the year 1999 by putting it in the form of a brief press headline.

Think about the imaginary press headline often, particularly when you are relaxed. When you are very comfortable with the 1999 headline, imagine headlines in earlier years that are necessary steps to your ultimate achievement. Wouldn't it be constructive if other key people in your company had the same clear goal and vision of success? This idea and many others are the basis of *Future Think's Creativity* audio-tape/workbook series (\$55 each) which guides the listener in relaxing imaginary trips into the future to experience success in specific segments of information technology

Creativity Exercise for You



EDITORIAL

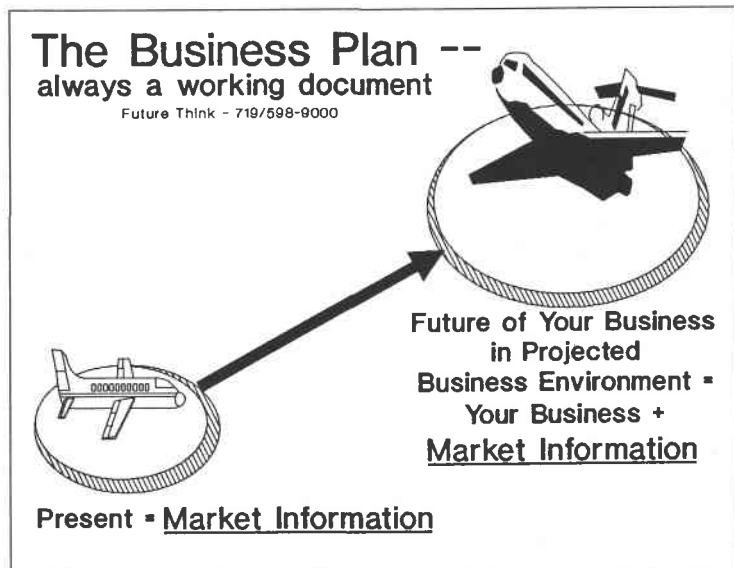
Why Vendors Need Market Information -- Part 1

Would you fly an airplane without maps, instruments or weather forecasts? Well, you can as long as you don't go anywhere.

Maps define for the pilot the terrain over which he or she will travel. Instruments provide real-time feedback about the speed of the aircraft relative to the air, the speed relative to the ground, the exact location of the aircraft, and the route to the destination. The weather forecast is an expert opinion about the weather along the planned route during the time of the trip. Clear, stormy, icy, turbulent — you may go anyway, but you'll be prepared

There's a leading personal computer word processing (their only product) company that is a perfect example of a company that has been very successful flying with homemade maps, instruments, and weather forecasts. Its officers have been quoted in the press bragging that they do not use outside market information. We'll call them the We-Know-Everything Company. We-Know-Everything is a single-product company par excellence. We-Know-Everything flies in its own back yard without knowing its true ground speed

Now let's talk basic instruments — You need good market size and market share data consistently measured or estimated from the same source year after year (or month after month if the segment is volatile enough such as personal computer software)



It's no different for high-tech vendors. You can be in business without market information as long as you don't go anywhere. That is as long as you stay in the niche where you know the customers and the business environment and where all the information you need can be gathered yourself — the equivalent to flying in your own back yard.

Your customers can tell you their needs only in the context of their knowledge. When the next quantum-leap product comes out, a customer's perception of needs changes based on the new knowledge. And you may wake up with no back yard.

Frequently such quantum-leap products are foretold by visionary market research companies. Even when not foretold, once a trend begins to rumble, you can count on tons of maps pointing the way in and around the new market eruption.

You may think your plane's high ground speed is hot-stuff because you didn't measure the tail wind. You may think your company is really moving, only to discover that your excellent growth was not keeping up with your industry segment — a sometimes fatal condition in segments where market forces select a few large winners. You wake up to find that in spite of burning all that gasoline, you didn't go anywhere.

Maps, instruments and weather forecasts are essential — buy the best plus another set or two to check them!

FEATURE REVIEW

LOCALNetter® Architecture Technology Corporation

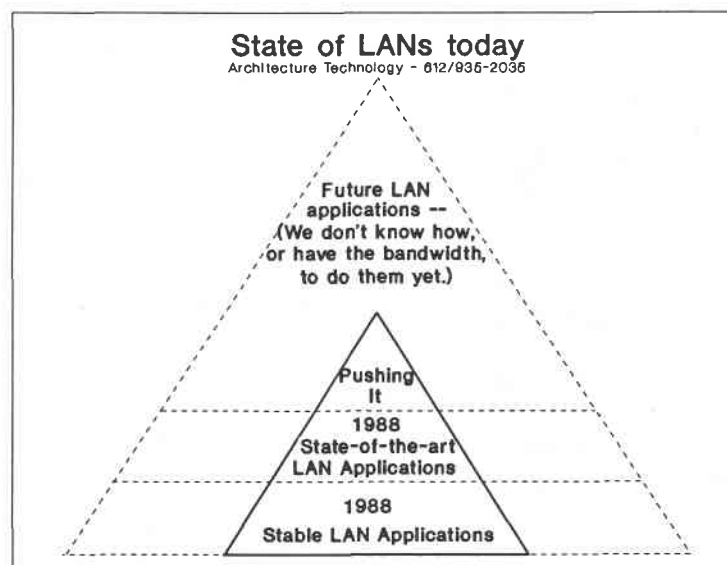
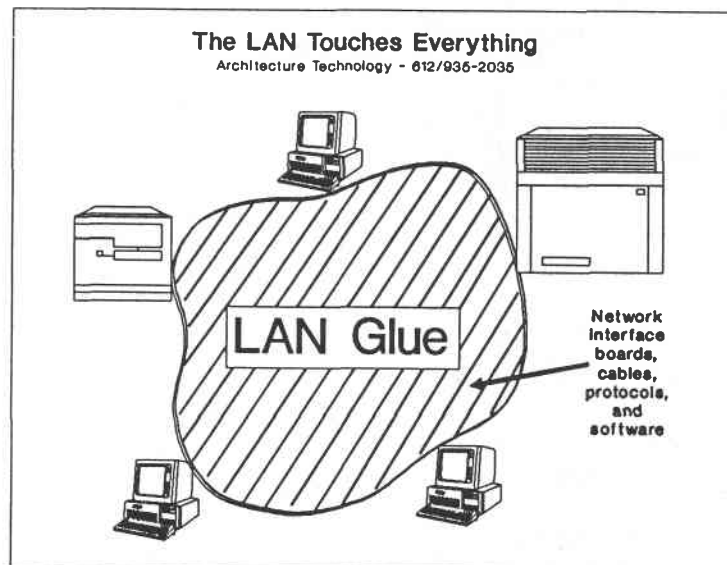
"Think about confusion."

— Dr. Ken Thurber, President
Architecture Technology Corporation

Recipe for a LAN application — Take a few computers (whatever kind you like) from supers to PCs. Pick a server or two (a computer designated as the big base for data). Add a network interface card to each computer — just use any kind you like as long as they work with every computer you plan to have on the network. String some cable as specified by the interface boards. Now pick some network software. It'll come in a big box with a piece for the server(s) and a little piece for each workstation. Now you have a local-area network. Doesn't do much yet. So you'll need some applications software. Be sure it will work with the network software. The LAN or network is embodied in the particular combination of interface cards, cables, and network software that you choose.¹ Probably you think of it as having computers and a LAN. And you just wouldn't believe how many ways there are to make or apply the glue we call LANs.... Thousands! Overwhelming

According to Ken, there's a whole passel of problems that today can't be solved for some reason, but that will one day be solved using LAN technology. The restraining factor at any given time could be workstations, mainframes, operating systems or communications. But usually it has to do with sufficient bandwidth at the right price

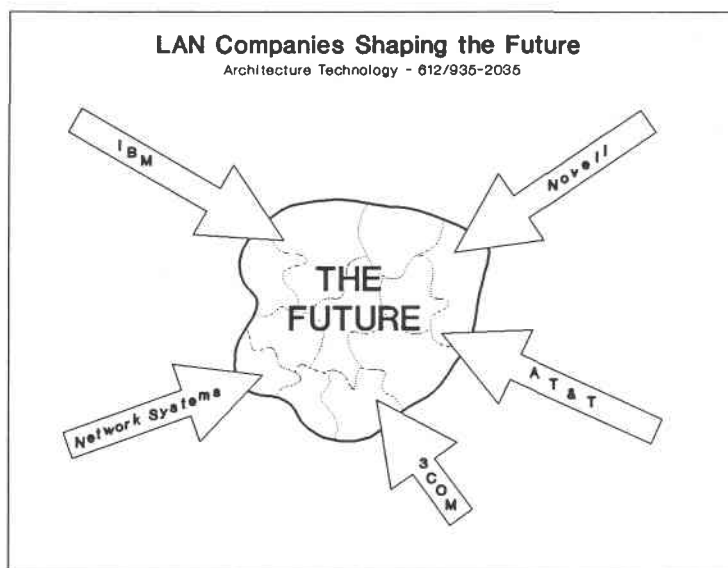
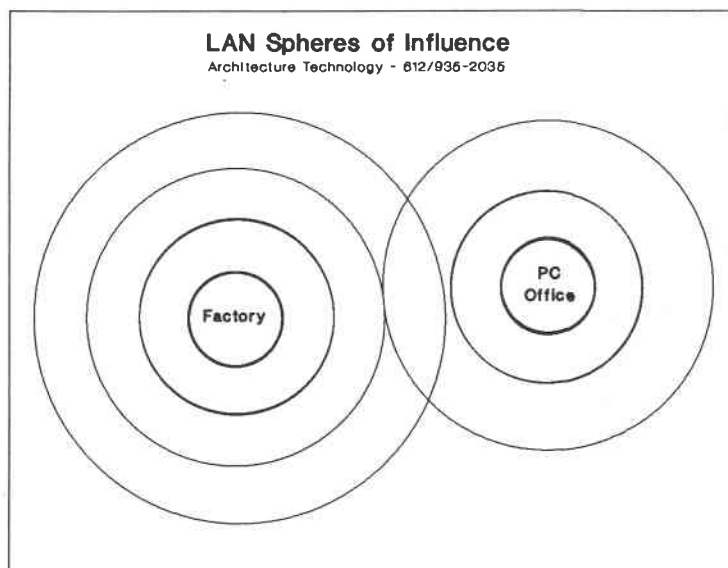
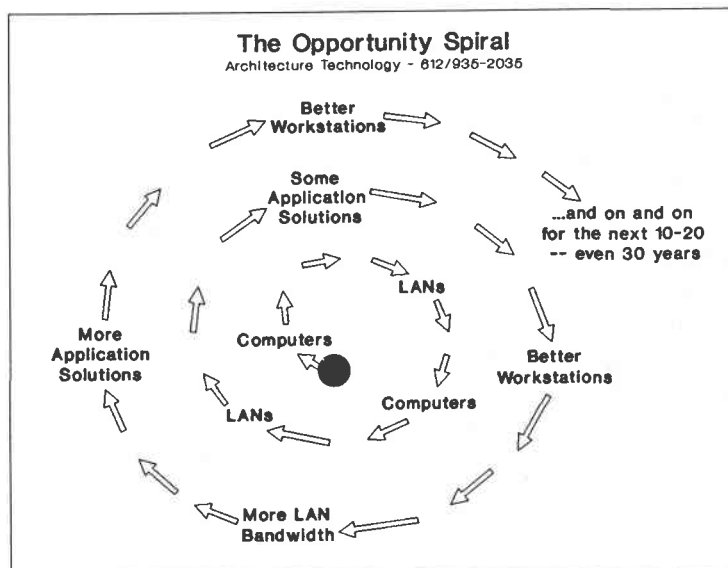
That's how Ken responded when I asked him to describe the state of local-area networks today.



Ken says the opportunity spiral won't slow in my lifetime.² It started with computers. Then we connected them. Which made us want more and better computers. Then more and better connections. The trick for a user is to buy into high-performance, non-freaky technology. How? Well, that's why LOCALNetter[®] and Architecture Technology's consulting business is so successful — there's a zillion non-optimal ways to LAN at any given time. Then there are the really bizarre applications like image transmission on LANs. Someday. The trick for the vendor is to cause the next escalation in the spiral while being just compatible enough with the preceding standards that you don't lose the market. Good luck. The half-life of a LAN product is nine months, then it's on to the next level in the spiral. These jumps occur when all the pieces have jostled into place

There are no dominant players. Each LAN company has a sphere of influence. They create an application with some combination of their network technology and computers and are successful in a given market niche. Attempts to broaden are rarely successful. The number of glue companies (LAN suppliers) is not quite uncountable

According to Ken Thurber, "IBM has created a class of LANs unto themselves called Token-Ring. IBM has 95% of this market. IBM has accomplished this through intimate, bizarre software interfaces that make it very, very difficult for other people to build compatible products — all in the name of performance, of course. . . . AT&T is assembling a broad spectrum of LANs. They'll become the big broad-based LAN supplier. Novell and 3Com are head-to-head in dominating the PC arena. Network Systems dominates the mainframe LAN business." Ken says to take a look at Network Systems Hyperchannel DX



LOCALNetter® Delivers

These days you can't consider yourself a computer pro without a thorough knowledge of LANs. I know of no better guide through the tangle and the maze than LOCALNetter®. You might also try a couple of Architecture Technology's books — little gems, and well kept secrets except for those hidden in the briefcase of the guy next to you

For: LAN users and vendors, computer and software vendors

Authors: Dr. Ken Thurber and the Architecture Technology Staff

What: Newsletter

Pages: 750 pages/year

Price: \$300/year U.S.

Reviewing **LOCALNetter®** is like old home week for me — I've relied on it for years. Ken and I traded subscriptions back when PCs were toddlers and LANs weren't much more than a gleam in the eye of Bob Metcalfe and a few others.

Since April 1981 **LOCALNetter®** has been a leading source for independent expert opinion and information on LANs. It grew up with the business and it shows in every word. The 500 to 1,000 subscribers are mostly large end-users and, of course, all the vendors.

Every month **The LOCALNetter®** delivers twenty pages of objectively presented news with plenty of straight-forward opinion about what's really important. There are also a couple of in-depth Special Reports (15-25 pages each) every month about an important LAN product. That's a lot of material. But that's what it takes to stay up with an industry with a technology half-life of nine months.

Acclaimed features —

Comprehensive. If it is not in **The LOCALNetter®**, it's likely not significant in the land of LANs. **The LOCALNetter®** is independent opinion written for large LAN users.

Limits or not so acclaimed features —

Vendors get excellent value from **The LOCALNetter®**, but its not where to find your market numbers and forecasts. It does, however, have good product-centered strategic analysis of competitors.

For Additional Information Contact:

Architecture Technology
P.O. Box 24344
Minneapolis, MN 55424

612/935-2035

Fax: 612/829-5871

"The network is the system."

— Ken Olsen
Digital

"Now that's an understatement."

— Portia

1. For the record, I love my LAN. The server is a 300MB 25MHz ALR 386. Racore network interface boards (16 Mbit bandwidth). Five assorted workstations (ATs, XT modified with 12 MHz 286 mother board, and a 286 DataFox box with home-brew innards. Novell network software. I work from home with a ALR 25 MHz 386. I call (regular phone line, 2400 baud modem) into a dedicated workstation (Carbon Copy is clever, clever, clever). Every workstation has an HP LaserJet II (couldn't share the way we use them). We use Microsoft Word (looking forward to 5.0 and more), Paradox Multiuser (wonderful), Harvard Graphics (I'm still miffed that I can't upgrade my three single-user versions to the multiuser one), Microsoft Excel (infrequently), and PageMaker (only when we have to). Our network was simple as pie thanks to my husband, Dexter, and Colorado Software. It worked the second time! Stand-alone fax . . . sure would be handy on the network.
2. I'm 46, healthy, vegetarian, rarely exercise, positive thinker, and my observation is that life's a great trip! I'll be around awhile.

FEATURE REVIEW

COMTEC Market Analysis Services Gartner Group

This thought was not in the context of information technology, but it couldn't be more appropriate

"Chaos is order that is not yet understood."

— "I read this somewhere recently and I've been thinking about it ever since."

— Portia

We Understand the Chaos in Information Technology — Now Where's the Order?

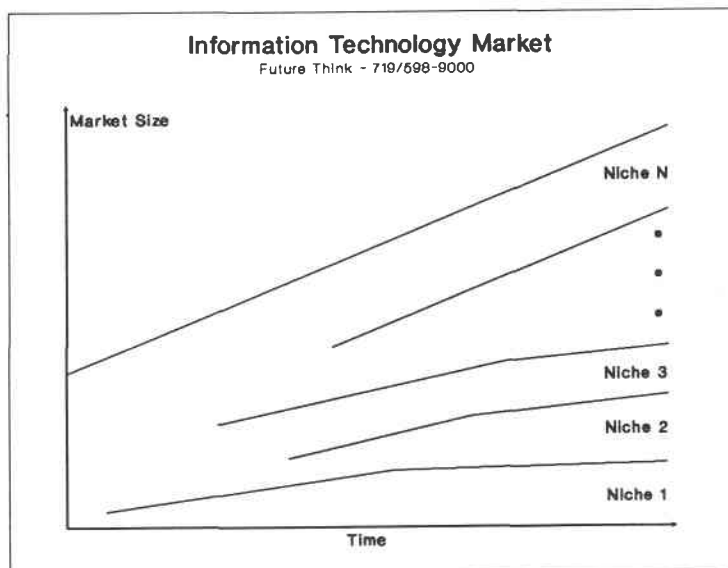
With accelerating technology turnover, new product introductions before we've understood the old, myriad markets with disparate characteristics, markets that further subdivide almost as we watch them, competitors galore — each with unique strengths in unique markets — and market requirements changing sometimes in the blink of an eye; the information technology industry is a clear candidate for the most chaotic business environment of any type on the globe.

No wonder we disagree on the future — disagreements on the past and the present abound

It's difficult to be a market guru — even in a given segment. It's harder still for purveyors of information technology to trust their gurus. After all, a multitude of conflicting perspectives may be correct depending on the context, timing, market segmentation and data. The press abounds with conflicting stories about how it is — all based on someone's data.

The Niches are the Market

My opinion is that in information technology today all marketing is niche marketing. There may be no horizontal products, but there are no horizontal markets — there are lots of jumbo niches. Even the small-but-beautiful niches are large for certain products. Understanding the niches and treating each uniquely from beginning to end is absolutely essential to success in information technology today, and in the future. What foundations do you use for your business planning, product planning and marketing? If you are using whole-market generalizations, you'd best go home



Now That's What I Call Vision!

I needn't tell you regular Future Thinker readers that I am a Gartner Group fan. I don't have a bias or connection. In fact, at one time I had a negative bias based on the non-information and perspective of a competitor (my Future Computing days). It's just that the more I study the information industry, the more I appreciate what Gartner Group has built — perfect it's not, but terrific it is. And COMTEC is probably the single most farsighted commitment Gartner Group has made

Gartner Group foresaw our intensifying need for increasingly segmented market data — the kind of data that consumer goods markets have enjoyed. Data not based on estimates from vendor guesses, nor data on just a few product types in a given market, (e.g. mainframes in large corporations), but data across many classes of computer and telecommunications equipment and services that would accurately represent the whole market as well as the nearly endless niches. Data gathered in a consistent manner year after year. Data designed, gathered, processed and analyzed by respected experts in the phases on market research.

From Vision to Reality

COMTEC started as a joint venture in 1982 between Gartner Group, Burke (one of the largest U.S. market research firms), and Infratest (one of Europe's most prominent industrial market research organizations). In November 1986, Gartner Group acquired the interests of the other two partners.

Today, Burke continues to conduct the telephone and personal interviews and compiles and checks the data. Westat, an internationally recognized source of sample design, handles COMTEC sample design. Datan, a specialist in survey tabulation and analysis, turns the raw data into information.

The entire COMTEC process is quite awesome and very costly. Each year in the fall, the entire methodology is reviewed including the objectives, special considerations, statistical methods, lists, etc. The new questionnaire is prepared and the interviewers are trained. In January data collection begins. Three months and 35,000 interviews later, the editing, checking and cross-checking are in full swing. In June the data is weighted to project it to the entire U.S. market. And by July clients are receiving the data, reports, cross-tabs, tapes, and diskettes — and are digging into the online database. I can just imagine the "Aha's!" and "Oh, wow's!" all over the industry.

Such data is not inexpensive. Gartner continues to invest year after year. With annual expenses in the early years of \$2.5 million (about \$5 million today), and in the beginning, only a handful of sophisticated clients who understood the need, I can imagine that every year it must have been a big decision to continue — given that Gartner's profitability wasn't nearly as interesting as its growth. But now it appears COMTEC has turned the corner and so has our industry's understanding that not all data are created equal. And frequently you get what you pay for.

COMTEC's Clients are Who's Who

Today COMTEC's clients pay an average of \$100,000 per year for the COMTEC Modules of their choice. I've seen a partial list of 28 clients that read like who's who in computers, software and telecommunications. I wish I could have printed that list here but you know how shy some companies are.

One's commitment to a vision can be measured by one's continuing investment over unprofitable startup years relative to one's ability to invest. Gartner Group scores very high for their COMTEC vision

Our industry is growing up and so is its demand for sophisticated, accurate, projectable, disaggregatable data

Quality market data in the information industry is critical as our industry becomes larger, more segmented, and structured more like consumer markets. Back when markets were small and homogeneous and vendors knew each customer personally, market research companies could provide market size and share estimates based on compiled vendor sources and everyone was happy. Not so today. Although there are some markets that are so homogeneous that supply-side estimates (based on unofficial vendor sources) suffice, most need to be segmented by industry, by business size, by geographic region, by type of establishment and by combinations of installed products. The reason — different sales and marketing approaches are needed for different segments — sometimes even different products. There are different combinations of competitors, different leading vendors, different equipment installed, and different distribution channels in different segments — even for the same product class. Companies with over 500 employees are not like those with 100-249 employees. The wholesale industry is not like banking. Successful vendors know the differences. Properly segmenting your market with a thorough understanding of the characteristics of each segment is key to success. Even data gathered from end-users may not give you what you need. Because nationally projectable data is generally very expensive to gather, most end-user survey data, though informative, does not represent the entire market. There are a few important exceptions in very narrowly defined segments such as mainframe computers. Frequently there are biases in the data that you should understand before relying on it. COMTEC's data is nationally projectable and disaggregatable across a wide spectrum of products, business sizes, SIC codes, establishment types, and geographic regions

The COMTEC Data

There are surveys and there are surveys. There's data and there's data. COMTEC is in a class by itself.

Dimensions of COMTEC data

For five years, COMTEC has collected data from 35,000 executives in 8,000 non-farm, non-residential establishments on the most important information technology products including: key telephone systems, centrex, PBX, typewriters, word processors, plain paper copiers, coated paper copiers, facsimiles, duplicators, personal computers, minicomputers, mainframes, computer terminals, long distance services, and microcomputer software. For each of these products COMTEC determines: number installed, year installed, makes and models, distribution channel, applications, budgets and future plans. The questionnaire is 300 questions in all and may require interviews with scores of different people in an establishment.

Solid, documented statistical design

The 8,000 establishments are selected from a COMTEC population frame which is a combination of various lists that, taken together, form a high coverage of the universe of all non-farm, non-residential U.S. establishments. The basic list sources include the Dun & Bradstreet file (which includes the National Business List file). These are supplemented with lists which cover schools; hospitals; post offices; and federal, state and local governments. Each year the COMTEC sample design has been improved. It is designed so that data can be projected to represent the entire U.S. market of 7 million establishments, 110 million workers, 60 SIC-code-based vertical markets, 7 geographical regions, and 12 establishment types — all with known sampling error. The market sizes for products in wide use across all business sizes and industry segments have a coefficient of variation of $\pm 3\%$. For products that are more narrowly used only in certain business sizes or in particular industries, the projected data is as close as $\pm 10\%$.

Quality data in — actionable information out

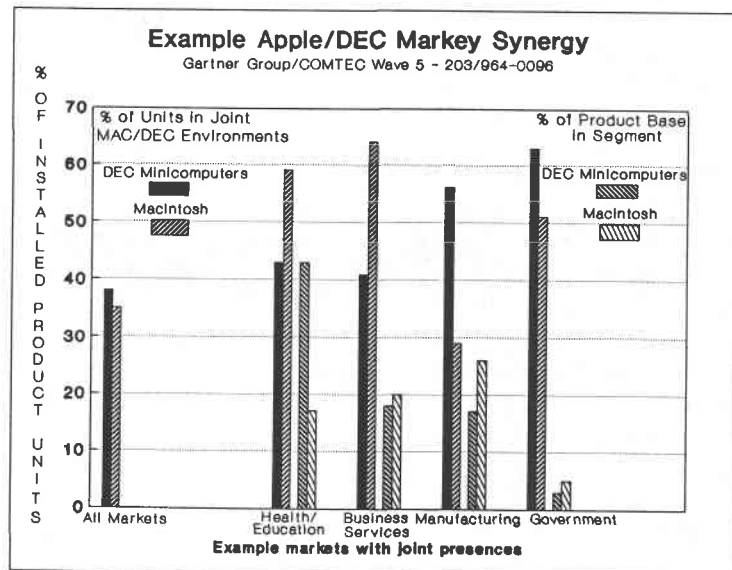
The COMTEC response rate is 70% of the 11,800 establishments contacted — very high for a survey of this type. The Burke interviewers are relentless over the three-month interview period, even making trips to companies to complete a partially complete questionnaire if necessary. Many quality checks and automatic data consistency checks are built into the data collection, entry and processing phases. Six months after interviews begin, the data is available for clients online from Datan, on PC diskette, as cross-tabs, as summaries, as Gartner analyses, and as custom reports. But let me warn you, this data is so rich and its analysis for a given company so important, that you will want an analyst assigned to be the COMTEC answer-person. Buying the COMTEC data is just the beginning. The COMTEC-based analyses specific to a given company are nearly boundless. I recommend a program to prioritize and disseminate client-prepared analyses to management. Done correctly, these initial reports and the ensuing questions will provide critical insight needed for planning and daily decision-making.

COMTEC Data Speaks for Itself

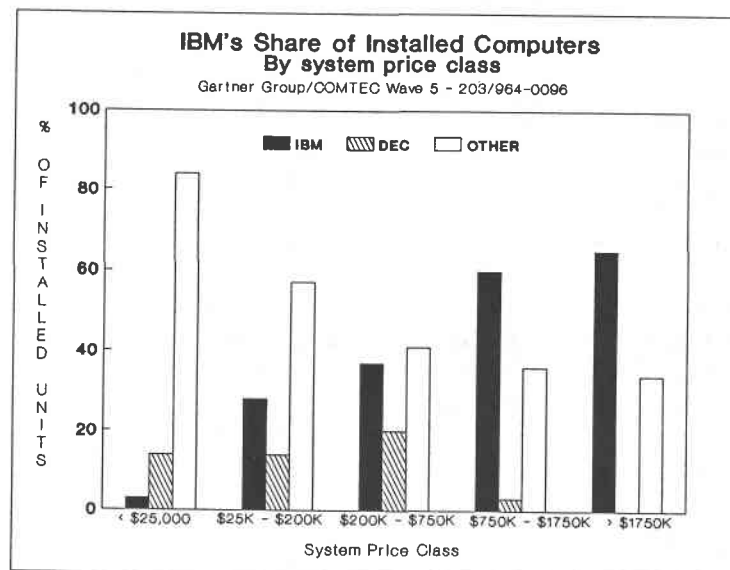
*Next to writing **Future Thinker**, the job I would most like to have is building layer upon layer of information industry analysis based on COMTEC data, then creating order from perceived chaos by communicating the evolving information technology industry structure that COMTEC is documenting so well. For from this new order, we have the best vantage point for building the future*

Want to understand the potential synergy between Apple and Digital? Nearly 40% of DEC's minicomputers and Apple's Macintosh PCs are in joint environments. In market segments that are key for each player, DEC and Apple enjoy a strong joint presence. Gartner Group predicts excellent market leverage and significant opportunities for technical systems integration

The best way for me to tell you about the richness of the COMTEC data is to show you examples. I had a very difficult time selecting so few from all the choices available. And each chart is an extreme simplification of the available data. I just can't do a chart showing the variations of more than 60 vertical industries — I can't even show the 12 industry groups frequently used in the Gartner presentations. The multi-dimensional nature of the COMTEC data has made me crazy — crazy to dig into it more and more. To finally see some order in the chaos we call information technology.



According to Gartner Group, each of the twelve major computer systems vendors have a unique (and less than all encompassing) market perspective. Even IBM — the leader with a 26% share of the installed base — has blind spots in the market it serves. IBM sees a mainframe market — 76% of it's installed base by value is mainframes

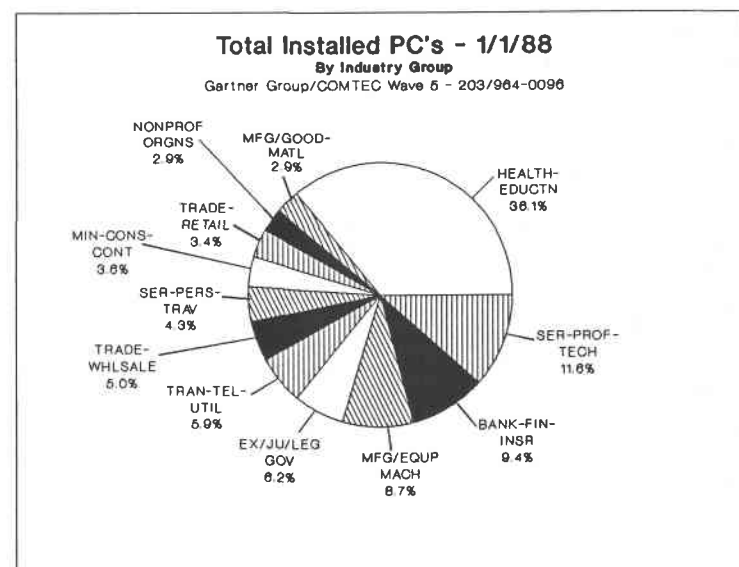
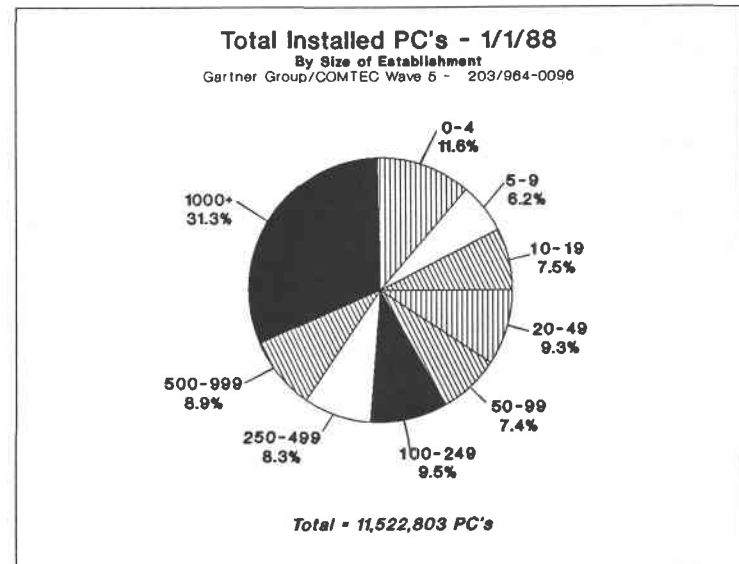
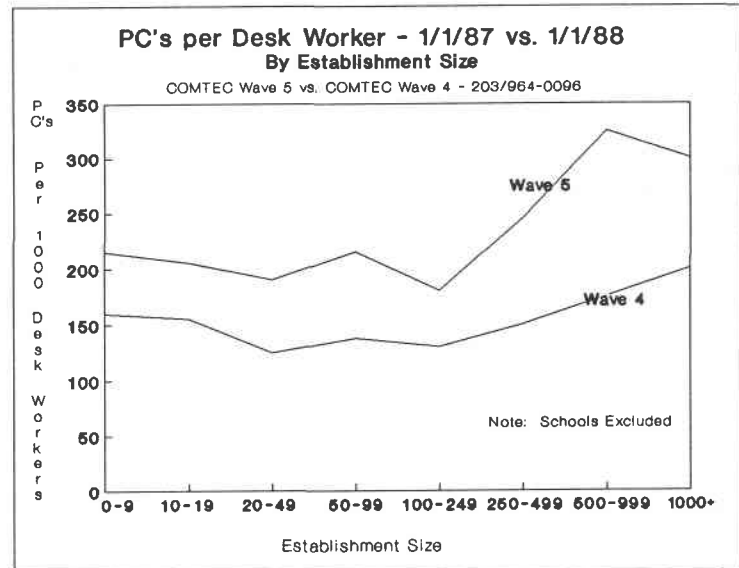


According to COMTEC, the number of personal computers in non-farm, non-residential establishments as of 1/1/88 was 10.8 to 12.2 million (95% confidence). Gartner says that the self-employed, working-at-home market not in the COMTEC data may account for as many as 10 million (not 1, not 100 — 10 million is the nearest order of magnitude) PCs — Gartner has recently done a special study

COMTEC believes that the number of desk workers (a Gartner concept) is the best single indicator of market segment characteristics

Contrary to popular belief, most of the personal computer market is not in Corporate America — establishments with over 1,000 workers. It accounts for only 31% of the installed base. The remainder are in small establishments. The smallest establishments (0-4 employees) account for 12% — and don't forget we may have another 100% (10 million) in home businesses. So the world of small may be as big or even much bigger than the world of big, with the other half in between

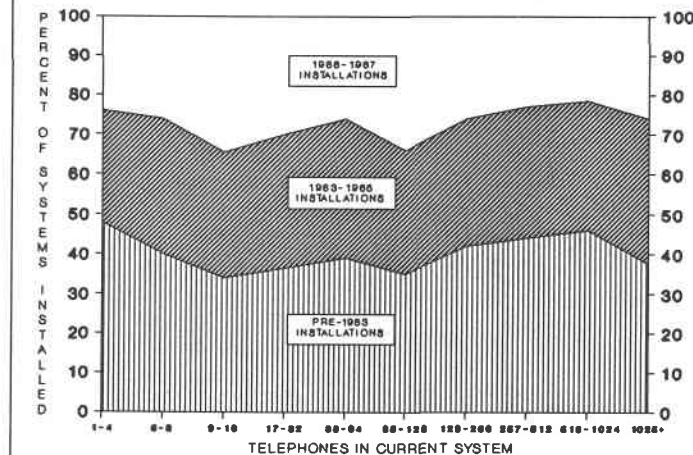
Health-education is the industry group with the largest number of installed PCs. That's because schools have 23.7% of all PCs covered by COMTEC. Schools are like another planet when compared to the rest of the PC market. In schools Apple is the leader with 60% of the installed base. And instead of Lotus 1-2-3 and dBase we find MECC and Sticky Bear. IBM's share of the COMTEC universe has had its ups and downs — mid-1983 — 10%; 1/1/85 — 29%; 1/1/86 — 37%; 1/1/87 — 39%; and 1/1/88 — 35%. The IBM share of planned purchases at 1/1/88 was 40%



According to COMTEC, 95% of telephone system sales are replacements for existing installations. Replacement rates range up to 25% for pre-1983 systems. In contrast, rates for 1986/87 systems are less than 5%. In mature markets, market sizing must consider segment availability

1988 U.S. Telephone Systems Market

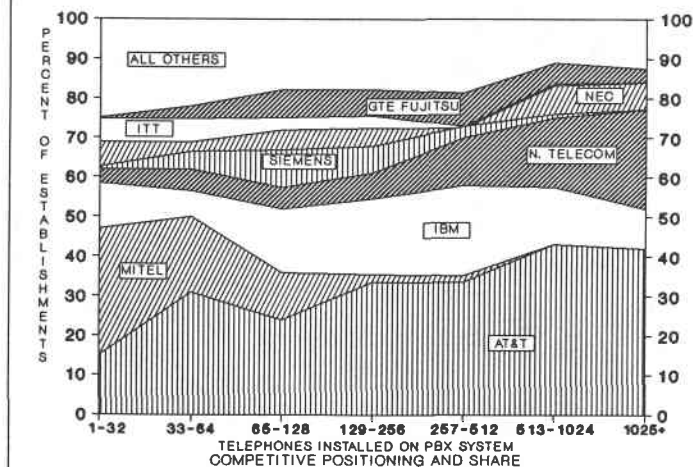
Gartner Group/COMTEC Wave 5 - 203/964-0096



AT&T sees a large systems market. Northern Telecom and NEC are focused entirely on the top end of the market. IBM/Rolm is AT&T's strongest competitor across most PBX size ranges — within segments, however, others may be stronger

1988 U.S. PBX Systems Market

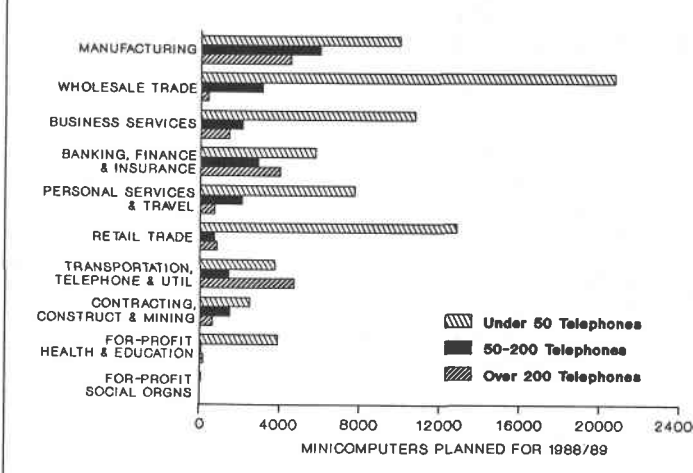
Gartner Group/COMTEC Wave 5 - 203/964-0096



According to COMTEC, minicomputer players have little to gain from merging forces with large telephone systems players. While 24% of minicomputer sites also have a PBX, only 5.2% of minicomputer sites, containing 14% of minis installed, have a telephone system with over 200 phones. Although 70% of minis are in sites with under 50 telephones, no alliances involve players with a small telecom system focus

Telephone System and Minicomputer Synergy

Gartner Group/COMTEC Wave 5 - 203/964-0096



*Fred, Oakey, Dick, and Bert —
I thank you for your patience in
teaching me something about
COMTEC. I thank you even more
for the important contribution you
are making to the information
processing industry*

*For some vendors, this under-
statement of what they believe is
their market share, causes anxiety.
Some just can't believe that that
many of their PCs are in residences
where they are not counted by
COMTEC. But I'll bet there are.
How big's the Missing Market?
Maybe Gartner Group will tell us*

*Remember, even if the data is a year
old at the time you use it, one-year
old solid data is better than one-
week old grab bag numbers*

*Sorry if we seem demanding,
Gartner Group. It's just that now
that you've answered our first
zillion questions, including many
that we didn't know we had; can't
you answer just a few more . . .*

COMTEC People

COMTEC is the collaborative effort of many. But the four names you should know are Fred Abbott, General Manager & Vice President, COMTEC; C. Oakley Mertz, Vice President, COMTEC; Dick Cryer, Publisher; and Bert Heath, Director of COMTEC Applications.

COMTEC's a Winner, But . . .

How big's the Missing Market?

COMTEC data does not provide information on farms or homes or even on offices in homes. For certain markets, e.g. PCs, this leaves a major gap in our understanding — probably bigger than many manufacturers understand (perhaps as many as 20 million lilliputian enterprises — many of them thriving). So if a manufacturer has a significant portion of its products sold to farms, businesses in homes, or to individuals; these products are not counted by COMTEC and that manufacturer's market share in the COMTEC-quantified market does not represent the manufacturer's whole market. Too bad.

All in good time

COMTEC reports are available in July with data as of January 1st of that year. And that's all there is until the following July; so data is always 1/2 to 1-1/2 years out of date. Some might complain, but the six months it takes COMTEC is as prompt as you'll get it for this scale project. The other variable is the frequency of collection. Now that there is solid support for yearly collection, perhaps we'll see updates between cycles for more volatile industry segments.

OK, but what I would really like to know is . . .

A potentially important segmentation not possible with the COMTEC data is job or work-group functions across industries, e.g. marketing departments, engineers, secretaries or technical writers. COMTEC, you've told us how important the number of desk workers is to understanding a market segment; now tell us how requirements and market characteristics vary across types of desk workers and types of work groups.

Smile, COMTEC. You didn't think it would be easy to stay ahead of us, did you?

For Additional Information Contact:

Gartner Group
56 Top Gallant Road
Stamford, CT 06904-2212

203/964-0096

Fax: 203/324-7901

FEATURE PROFILE MediaMap¹

MediaMapTM — the Product

MediaMap's Market

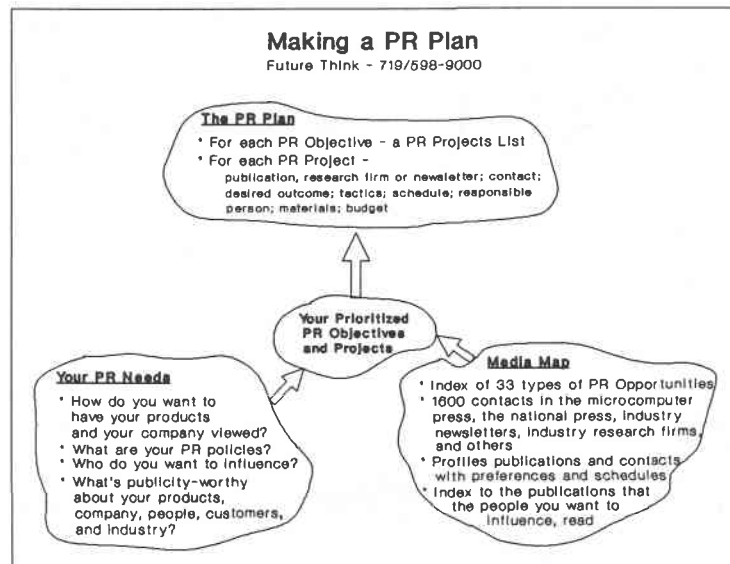
MediaMap, the information product, is for microcomputer industry vendors and PR firms. The more than 300 subscribers include the most respected PR firms and personal computer industry vendors. For example, PR firms include: Franson & Associates whose clients include Hewlett Packard and 3Com Corporation, and Miller Communications whose clients include Conner Peripherals and Plexus Computers. Vendor subscribers include Aldus, Apple, Ashton-Tate, Bell Atlantic, DEC, Kodak, Hayes, IBM, Lotus, Novell, Peter Norton Computing, Symantec, Tandy, Unisys, and Zenith. And there were several PR firms and vendors with names unknown to me — small firms for whom **MediaMap** is essential. But **MediaMap** is not just for beginners — it's also for PR pros who spend their every working moment on the fast-track of personal computer industry PR. Some publishers even use **MediaMap** for competitive analysis — clever.

MediaMap's Objective

Simple — to be the indispensable reference (tattered with use) for information you need as the basis of your PR program — facts about the microcomputer industry information structure, publications, editors, writers, columnists, newsletters, market research firms, industry analysts (gurus), and even radio and TV shows. **MediaMap** meets its objective and more.

*My impression is that for many companies **MediaMap** would pay for itself (\$1,450/year for four big editions, a client newsletter and phone support) the moment you handle one influential press contact more effectively — and that's very likely if you'll just scan **MediaMap**'s 700 pages with 1,600 press contacts in 100 microcomputer and national press pubs, 35 market research firms, 80 newsletters, assorted columnists, radio & TV shows, and user groups & associations — all specific to personal computers. All detailed with interviews with key editors, writers and analysts so that you know just how to approach them. I needn't tell you that what works with one editor is the pet peeve of the next. The entire contents of **MediaMap** are replaced quarterly with updated information. If you're handling PR in the microcomputer industry, it's either buy **MediaMap**, do what **MediaMap** does yourself (I hope you have a big staff), or just go back to mailing out press releases (who needed an intelligent, aggressive and effective PR program anyway?)*

A PR program with big payback needs much more than press releases. You'll need PR brain power, a PR strategy, tactics for PR projects, substantial management involvement — and press releases. Remember you're not just generating press coverage — you're creating your product's position and your company's position in the minds of your customers and in the opinions of those who influence your customers. Need I say more?



Using MediaMap is not like having a top-notch personal computer industry PR consultant at your side, but it's better than having a ho hum one

Very useful — it knows the PC industry for you

John Pearce, MediaMap's founder, says that most companies resist putting more resources into PR programs relative to advertising, because they think they have reached the point of diminishing returns. Not so, says John. They have only just begun. PR dollars, well spent, can do wonders relative to the same dollars in advertising. To achieve fantastic results you need a press-centered view — treating each targeted publication individually as the center of the world and tailoring your approach and material exactly to fit its needs. Practical, simple, and it works. Opportunities abound. In fact, John defines the PR profession as helping the press do its job

In the front of the new pages every 3 months is a stapled update memo giving you all staff changes at a glance. Thanks

For example, PC Week's Buyers Guide section in the Editorial Profile has a half-page description telling you exactly what material it uses and how to make the contact

MediaMap's content — index delights

In the indices are embedded a wealth of knowledge. In fact, the indices make **MediaMap** a system of PR — not just a useful, but passive, reference tool. The three indices are:

- ✓ The Topical Index — with 400 entries like ADA, COMDEX, plotters, LANs, electronic publishing and information centers — references the page of the editorial contact who might, if he/she likes what you have to say after you contacted them correctly, make your publicity dream come true.
- ✓ The 2,000 entry People, Publications, and Organizations Index helps you remember just which publication that writer works for, or find them in their new position.
- ✓ The Publicity Opportunities Index organizes everything in the book by PR Objective. The 33 types of publicity opportunities indexed are shown in the chart below. Under each publicity opportunity type, the index is further segmented by audience.



MediaMap's content — profile pleasures

Profiles continue the system theme, giving you what you need to know to implement your PR projects. Tabs divide Microcomputer Press, National Press, Industry Newsletters, Industry Research Firms, and Additional Opportunities (columnists, TV & radio, and users groups & associations).

Each profile starts with the publication or firm's positioning statement, audience profile, the circulation, the ad rate, frequency, parent company and address. An overview paragraph captures the mission in a nutshell. A chart at the bottom of the page shows audience demographics. The thorough Editorial Profile starts with recent changes then lists and describes every section, such as news, product reviews or columns, of the publication, with content, what type of outside input they use, schedule and who to contact.

You'll know who's in charge and who works for whom. And you'll know their pet peeves, hot buttons, and which days not to call

My favorite section of each profile is the Annotated Masthead — it tells about the people. There is something about any editorial person that you might wish to contact — right down to the last writer and columnist. You will never go in blind. Frequently interviews with key editors and staff members provide insights into personalities that may make or break your PR project. And if you'll carefully read what these people have to say, you'll be an expert PR pro in no time. Here's a sampler —

"My single biggest problem with PR people is the lack of homework they do. . . They think they work for their clients — they're wrong. They think too much client, and not enough customer. They should understand that we in the press are the customer, and if we don't buy, it's over."

— *writer, Washington Post*

"By all means send, send, send . . . I like receiving all sorts of information; if I'm interested, I'll call you back."

— *Alice Greene, Managing Editor, CRN*

"If someone calls me and says, 'we have a new—' I stop them right there and tell them to talk to One of the realities of PC Week is that we are not just concerned with micros any more. We have talk with people involved with voice and data communications, telecommunications, networking, mainframe architecture. . ."

— *Sam Whitmore, Editor, PC Week*

"The key is competition. We're interested in stories about how the industry is going to shake out, who's competing with whom, who's going to end up on the top. We don't get technical."

— *Mark Alpert, Reporter, Fortune*

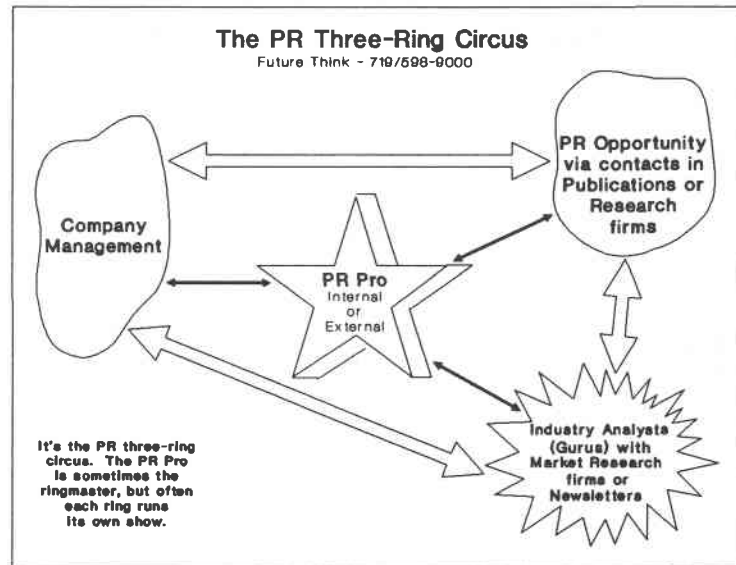
"I'm a contrarian by nature. When everybody's agreeing on something, I'm likely to disagree."

— *Stewart Alsop, Editor, P.C. Letter*

"I sign and observe non-disclosure agreements. I'm always looking for new things. It's my job to find people nobody knows about, but there has to be a story there. . . I don't like it when someone calls and then they don't know anything about their product."

— *Esther Dyson, Editor, Release 1.0*

MediaMap does a great job of providing the complete structure of microcomputer information channels by identifying, not just the publications, but also the mega-influencers such as industry analysts with market research firms and newsletters. I argue that the top five industry analysts in your segment should be the first step in your PR program. These star gurus influence the industry not only through their own publications but through their tremendous influence on and through the press. They are called on almost every important story. You must understand the real (not the simplistic, apparent) flow of information to your target audience



MediaMap™ — the Company

John Pearce started Cambridge Communications as a PR agency bootstrapped from savings from his computer industry consulting. From his PR working notebook he formed the vision for *MediaMap* when he realized that every PR person in the industry was keeping the same notebook. In July 1986, with a table of contents and one sample profile, John's crew went to PC Expo, talked up the product booth-to-booth, and came back with the orders needed to launch. He and two others produced the first edition (500 desktop published pages) in 3 months of 16-hour days and 7-day weeks. Today MediaMap is 10 people and besides the *MediaMap* product, is also launching a PR consulting activity called *PR Blueprints* (\$1,000 and up) which are tailored turnkey PR plans for in-house implementation. MediaMap also performs custom PR and opinion-leader research for vendors in any computer industry segment.

The company incorporated in 1988 with some interesting private placement funding. It'll be fun to watch the future. My request, along with many others, is an electronic form. Even the print product is a PR knowledge base with a not-quite-expert system — what a trip if it were on my PC.

A board member is Ed Fredkin, one of the fathers of AI (at MIT he headed their computer science lab). Rich Barno, an ex-Xerox executive and management consultant, is also on the board

For Additional Information Contact:

MediaMap/Cambridge Communications, Inc.
7 Central Street, #226
Arlington, MA 02174

617/646-4800

1. You may know them as Cambridge Communications, Inc. MediaMap has become so well known that the company uses it as its name.

VIEW & REVIEW

Future Utilization and Application of Cellular Technology in Telecommunications Technology Futures, Inc.

A View of the Future —

"Cellular radio technology has almost unlimited potential for further development over the next decade. We believe that, in the course of this development, cellular operating companies will provide strong competition for the wireline telephone entities in many areas of telecommunications services."

— from the report

Technology Futures expects the total monthly costs (including telephone) for cellular service to drop from the present \$145 per month to \$40-\$60 per month by 1997. And guess what — it's those chips again making it all possible. Increases in cellular system access, switching, and transport capabilities will allow cellular companies to provide both portable and fixed local communications services. And cellular will be all digital before wireline systems. If you think that the cellular system will be capacity limited, better think again. Maybe not. This report provides much to consider. Maybe each person will only need one phone . . .

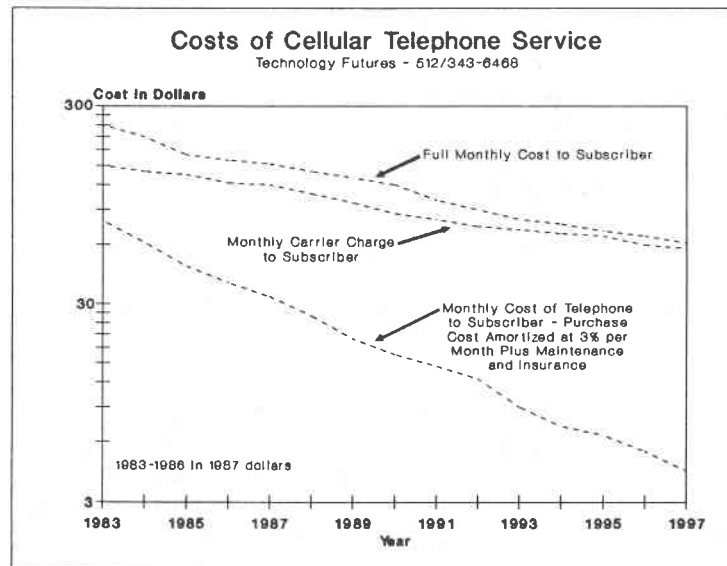
For: Telecom & services vendors

Author: Ralph C. Lenz

What: Report

Pages: 54 Exhibits: 18

Date: 1/88 Price: \$455



And Review — This study was originally done for GTE of Florida. Covers basic concepts of cellular radio, expected advances, potential areas for expansion, quantifies expected timing, and delineates the competitive impact. The great graphics in this report make complex concepts clear.

Celebrated features — Technology Futures, Inc., founded in 1978 by Dr. John Vanston, is well-known for its research, consulting, and training programs in technology forecasting. This report is an excellent example of the results of technology forecasting methodologies applied to predicting the rate of substitution of one technology for another. I am fascinated by Technology Futures's work (*Future Thinker* profile soon).

Limits or not so celebrated features — Now I have to learn even more about cellular and technology forecasting.

For Additional Information Contact:

Technology Futures, Inc.
6034 West Courtyard Drive, Suite 380
Austin, TX 78730-5014

800/832-3887

Fax: 512/343-6576

VIEW & REVIEW

Network Management Hardware & Software Markets International Resource Development

A View of the Future —

A network management system (NMS) is a hardware/software system that supports the network manager (person) in keeping the network optimally operational (under a wide range of conditions) and evolving (to fit changing needs). No small chore and we have a long way to go in building the ideal NMS. But build it we must. Successful NMS vendors will have enormous leverage for their other products and services since the NMS is the user's view of the system and the system is the entire worldwide complex of computing & telecom hardware, software, and network services in use by an enterprise. No wonder all types of vendors are playing, "go for the throat," from the beginning of this embryonic market

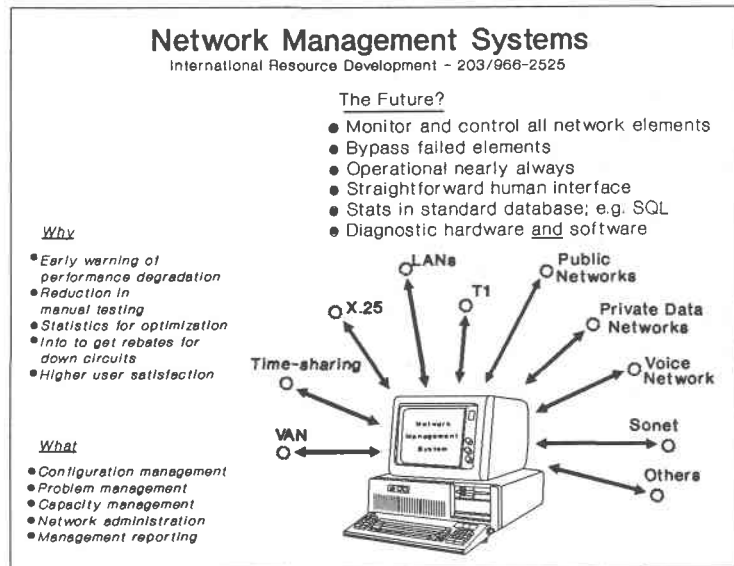
For: Hardware & software computer & telecom vendors

Author: Ken Bosomworth

What: Report

Pages: 254 Exhibits: 49

Date: 2/88 Price: \$2,300



And Review — The content: summary; nature of the opportunity for NMS; functions of NMS; segmentation & demographics of private & public networks; datacom NMS product examples; application examples; prominent NMS suppliers & products; specific vertical markets; market size & market shares; market & technological trends; ten-year market forecast by category; and company directory.

Fabulous features — Comprehensive.

Limits or not so fabulous features — Some might wish for a user or potential-user survey; but I agree with Ken, "In this and many other fast moving markets, customers are sufficiently behind the leading edge thinking that they don't understand the questions, and their snap answers to the questions turn out to not represent what they are really going to do."

For Additional Information Contact:

International Resource Development
P.O. Box 1716
New Canaan, CT 06840

203/966-2525

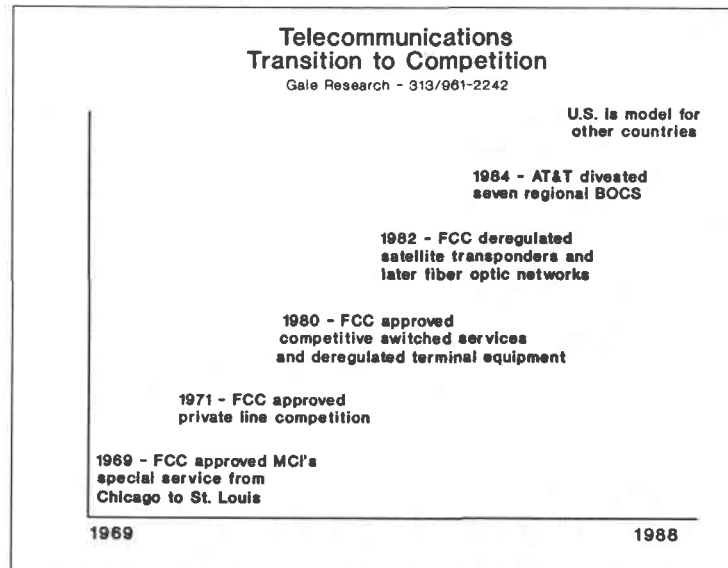
Fax: 203/966-3040

VIEW & REVIEW

Telecommunications Systems and Services Directory -- Third Edition Gale Research

A View of the Future —

This view of the evolution to competition is abstracted from the Foreword of Telecommunications Systems and Services Directory by Mark S. Fowler, Chairman, Federal Communications Commission, 1981-1987. There could hardly be a better testimonial to the increase in telecom competition than this stupendous Gale directory



Each entry provides: company info, date service founded, manager, related organizations, service type, headcount, description, applications, equipment required, geographic areas served, rate structure, publications, clientele, key features, planned new services, other info, contact, and notes. Very complete, e.g. there are 17 entries over 11 pages for AT&T. Architecture Technology's entry is nearly a page. NTT (Japan's telecom company) covers 3 pages. What a treasure!

And Review — Detail on 2,000 organizations worldwide, systems, and services; telecom glossary; and master, functions/service, geographic, and people indices. Covers providers of audiotex, cellular, datacom, E-mail, fax, LANs, microwave, satellite, shared-tenant, teleconferencing, telegram, telex, transactional, videotex/teletext/interactive TV, voice, and voicemail. Also associations, consultants, law & financial firms, publishers & information services, regulatory & standards bodies. And seminar, research, marketing, and training firms.

Phenomenal features — This is a Gale Research Company directory. To libraries the world over, that's all I would need to say because Gale's name on a directory means quality. It is.

Limits or not so phenomenal features — I didn't read all the 1,116 beautifully typeset, two-column, big pages; but I liked everything I did read and I know the rest is there when I need it.

For: Telecom vendors and users, libraries

Author: John Krol, Editor

What: Directory

Pages: 1,116 **Exhibits:** none

Date: 1/88 **Price:** \$285

For Additional Information Contact:

Gale Research
Book Tower
Detroit, MI 48226

313/961-2242

Fax: 313/961-6815

VIEW & REVIEW

CASE Industry Directory CASE Consulting Group

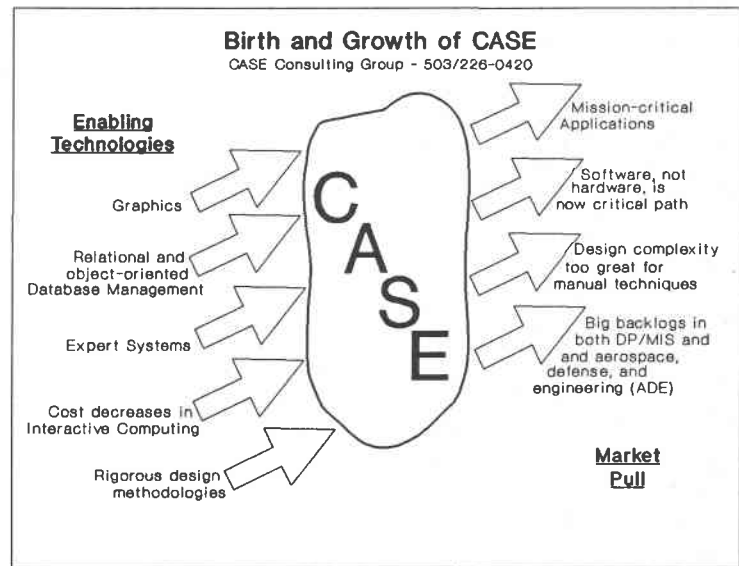
A View of the Future —

According to the authors, "CASE is an acronym for an activity that has been going on since the advent of computers, namely the automation of the process of developing software programs. . . . Some think CASE only means automated structured analysis and design tools. We feel that CASE includes any computerized tool that automates a portion of the software development life cycle." Today CASE is experiencing explosive interest — possibly the forerunner of explosive growth. Why now? The increasingly desperate need and, at last, the affordable enabling technology. If CASE delivers on its promises, when we look back from 2009, CASE will be seen as the pivotal technology from which came information systems so beyond mission-critical that we called them Enterprise Symbiots¹

For: Users and potential users of CASE, and CASE vendors

Authors: Gene Forte and the editors of *CASE Outlook*

What: Directory
Pages: 265 **Exhibits:** 7
Date: 5/88 **Price:** \$195



And Review — Nice CASE introduction. Thorough information on vendors, products, workstations, conferences, seminars, consultants, market research, recruiters, standards, associations, R&D, books, newsletters, articles and papers.

Grand features — Shows phases supported for each CASE product: Technical (requirements, program design, database design, real-time, rapid prototyping, automatic code generation, programming support, testing), Management (strategic planning, methodology, configuration management, requirements tracing, project management), and Support (testing & maintenance, reverse engineering, performance analysis).

Limits or not so grand features — Stiff pages plus perfect binding are a combination that will not lay flat on one's desk.

For Additional Information Contact:

CASE Consulting Group
224 Southwest First Avenue
Portland, OR 97204

503/226-0420 Fax: 503/228-8163

1. I made it up. An Enterprise Symbiot is a System (capital "S" intentional) so intertwined with a company's business that the two are indistinguishable — or at the very least symbiotic. We're counting on you, CASE!

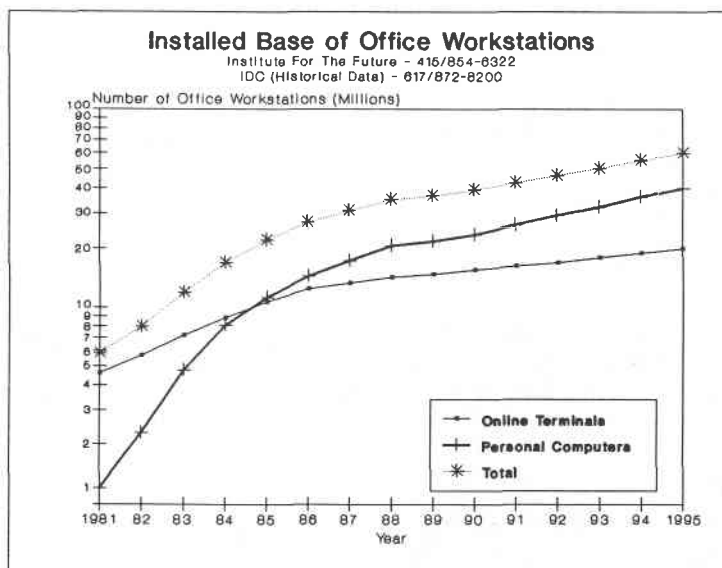
VIEW & REVIEW

1988 Ten-Year Forecast Institute for the Future

A View of the Future —

From the diverse forecasts in this report, I chose the Institute for the Future forecast for the installed base of office workstations, for viewing. According to Institute for the Future, the ratio of PCs/terminals will increase from 55/45 in 1986 to 67/33 in 1995. Obsolete workstations will be replaced after five years. The growth rate of total installed workstations will slow markedly in the late 1980s and early 1990s due to a business recession. The white-collar workforce of 60 million in 1986 will grow 1.5% a year to 68 million by 1995.

Average annual growth rates will be 5.4% for terminals and 11.9% for PCs. Sales of PCs will grow from 6 million in 1987 to 8 million in 1994. The ratio of workstations to white-collar workers will increase from 51% in 1987 to 88% in 1995



And Review — The ten-year forecast is not just a set of forecasts, but an integrated view of the U.S. business environment in the nineties. Presents several essays in the core forecast: Economy (e.g. The Consumer Boom: Is the End in Sight?), Demography (e.g. Changing Households), Labor Force (e.g. An Improving Educational Picture), Technology (e.g. Information Technology: Invention, Innovation, and Diffusion), and Government (e.g. The Regulatory Environment). Issue titles include: Trend Toward Business Teams, New Twists in Corporate Training, and Neural Nets.

For: Those responsible for corporate-wide planning decisions.

Authors: Essays by many IFTF staff

What: Report¹

Pages: 265 **Exhibits:** 106

Date: 1988 **Price:** \$6,000¹

Distinguished features — Review of their 1979 forecast. For example, they accurately predicted PCs and their impact on business organizations; but were too high on the diffusion of PCs, robots and videotex.

Limits or not so distinguished features — Excellent overview, but in any particular area you may want more depth — it's available through custom and multiclient studies.

For Additional Information Contact:

Institute for the Future, Attn: Greg Schmid
2740 Sand Hill Road
Menlo Park, CA 94025

415/854-6322

Fax: 415/854-7850

1. This report, an annual conference, 5 CAP reports, and consulting constitute the \$6,000/year Corporate Associates Program.

VIEW & REVIEW

RISC Architecture Trends & Markets The Information Network

A View of the Future —

The view of this report is clear — RISC (reduced-instruction set computers) will, from a dead start just a couple of years ago, capture 44.5% of the value of the computer market above personal computers by 1992 (that's four years away folks). Since 1987, that's a compounded annual growth rate of 58% — versus 8.7% for the whole computer market. RISC eliminates complex instructions in the interest of speed and simplicity. Simple instructions mean less processing logic (eventually lower chip cost) and faster execution rate (this report claims 70% faster on all computer functions). Power comes from optimizing the use of CPU registers and main memory. In spite of a software shortage, this report takes the position that the more than 30 RISC computer and chip vendors (among them HP, SUN, Convex, Intel, TI and IBM) have enough momentum and drive to force success. Indeed some of these vendors, e.g. HP, have nearly all their chips in the RISC basket

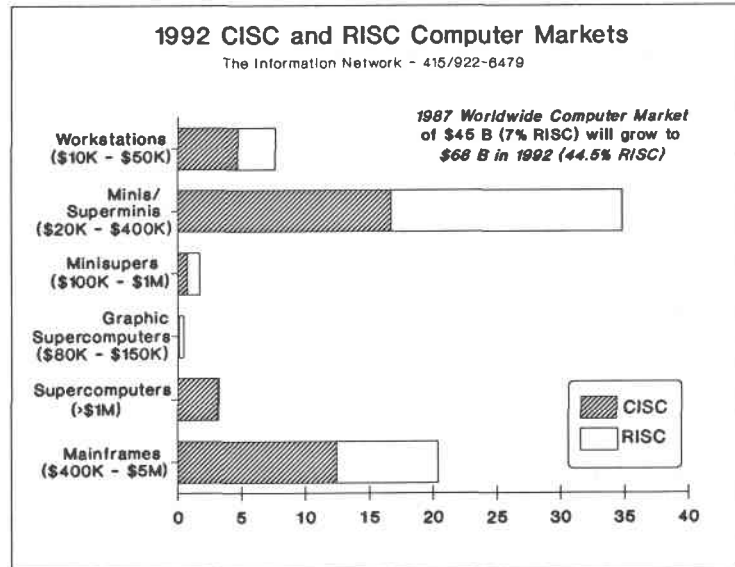
For: RISC computer, board, and chip vendors

Author: Robert Castellano

What: Report

Pages: 145 **Exhibits:** 21

Date: 8/88 **Price:** \$495



And Review — Straight-forward study of the emerging market for RISC technology. Covers RISC technology trends; RISC R&D; RISC chips, boards, and computer systems, RISC vendors, issues for users and vendors, and market forecasts.

Noteworthy features — Tutorially written history of RISC and CISC (complex-instruction set computer) architecture research in both industry and academia. Good descriptions of RISC activity by semiconductor manufactures and computer systems vendors. I was convinced that computer systems vendors are convinced that RISC is a winner.

Limits or not so noteworthy features — Focused on RISC technology more than on the characteristics and motivations of the end markets for RISC-based computer systems.

For Additional Information Contact:

The Information Network
2295 Vallejo Street, Suite PH-2
San Francisco, CA 94123

415/922-6479

VIEW & REVIEW

IBM Futures: A Five-Year Outlook Gartner Group

A View of the Future —

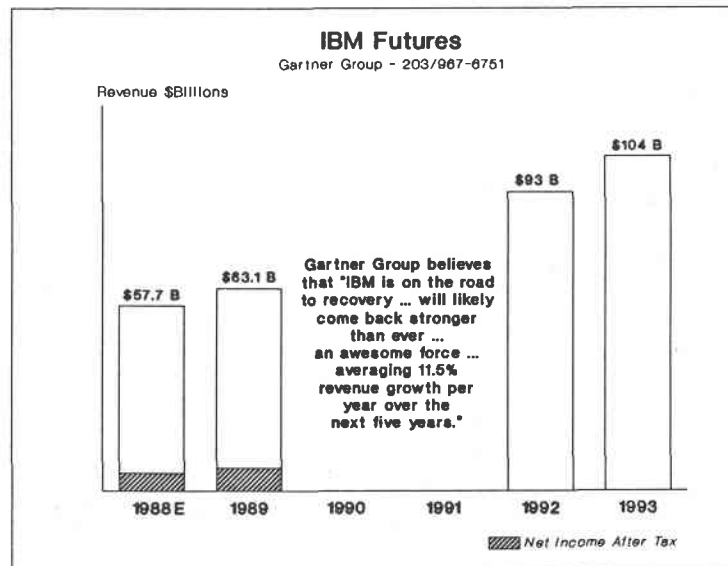
Gartner Group does not mince words and this report is a sterling example. While many of the words about IBM from other sources bear doom and gloom for Big Blue, Gartner's position is persuasively positive. In a nutshell Gartner says that in spite of many who would like to believe otherwise, IBM knows what it is doing. . . . And what it is doing is positioning every aspect of its business to dominant information processing in the 1990s, even if that means short-term challenges

If you are not a Gartner Group client today IBM Futures is an easy way to get started — non-threatening price for the value received

For: Computer, software, maintenance, telecom and . . . vendors and users

Authors: Edward L. Younker plus Gartner Group Staff

What: Report
Pages: 367 **Exhibits:** 97
Date: 8/88 **Price:** \$2,500



And Review — *IBM Futures* draws from nine Gartner Areas: *Gartner Securities, Software Management Strategies, IBM Large Computer Market, Small Computer Systems, Local-Area Communications, Enterprise Network Strategies, Office Information Systems, Personal Computing and Financial Strategies* — a wealth of expertise. Bullet format plus Q&A from Gartner's June *IBM Futures Conference*. For each area of IBM's business *IBM Futures* presents IBM's present products and strategic state, expected significant product announcements, affect on key competitors, effect on IBM customers and strategic planning assumptions for the five-year period. Glossary.

Smashing features — You'll want to keep it nearby — great reference. Bullets make browsing easy. Very specific!

Limits or not so smashing features — Rich, tasty and well-presented appetizer that makes one hunger for more and . . .

For Additional Information Contact:

Gartner Group
56 Top Gallant Road
Stamford, CT 06904-2212

203/967-6751

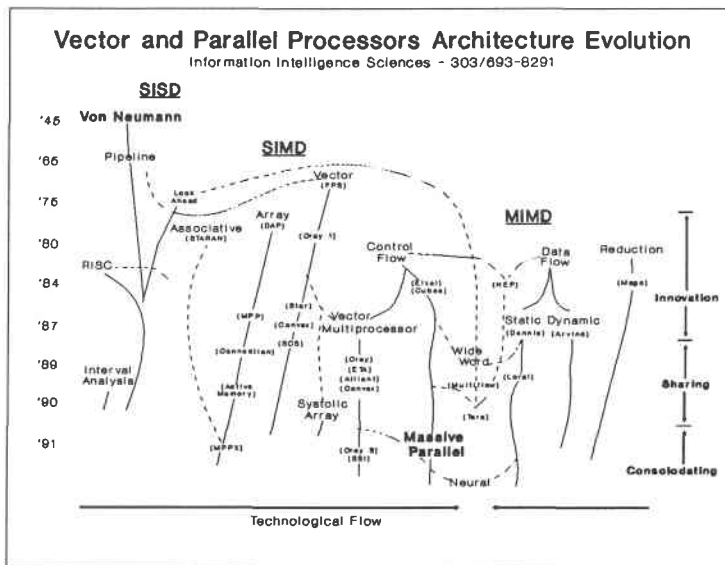
Fax: 203/324-7901

VIEW & REVIEW

Vector and Parallel Processors Information Intelligence Sciences

A View of the Future —

According to Howard Johnson, the first thirty-five years of computing was marked by significant innovation in computer architectures followed by the most recent ten years of sharing of the results from different approaches. There has been a technology flow towards vector-multiprocessing and massively parallel machines. In the future a consolidation may occur so applications can begin to efficiently exploit results of the surviving architectures. This chart shows the flow of technology from classical Von Neumann SISD (single instruction stream, single data stream) machines on the left to tomorrow's massively parallel (neural even) MIMD (multiple instruction stream, multiple data stream) machines on the right



And Review — After an 11 page introduction and definitions of database parameters, the database printout provides characteristics of vector and parallel processing computers with common feature nomenclature and quantitative units. Profiles cover 198 machines from 91 companies. The data for each computer includes: company, address, phone, contact person, model, first installation date, number of installations, price, architecture (10¹), technologies (9¹), word size & format (6¹), execution (6¹), function units & instruction (5¹), storage (13¹), communications (5¹), performance (7¹), and software (5¹).

Notable features — Good quick reference guide. Consistent data for each computer.

Limits or not so notable features — Just what a computer architect may need, but a less technical audience would need tutorial information and analysis to make use of this database.

For: Technical and competitive analysis staffs of computer vendors and high-performance computer users

Author: Howard Johnson

What: Report
Pages: 117 **Exhibits:** 1
Date: 9/88 **Price:** \$100

For Additional Information Contact:

Information Intelligence Sciences
15694 East Chenango Avenue
Aurora, CO 80015

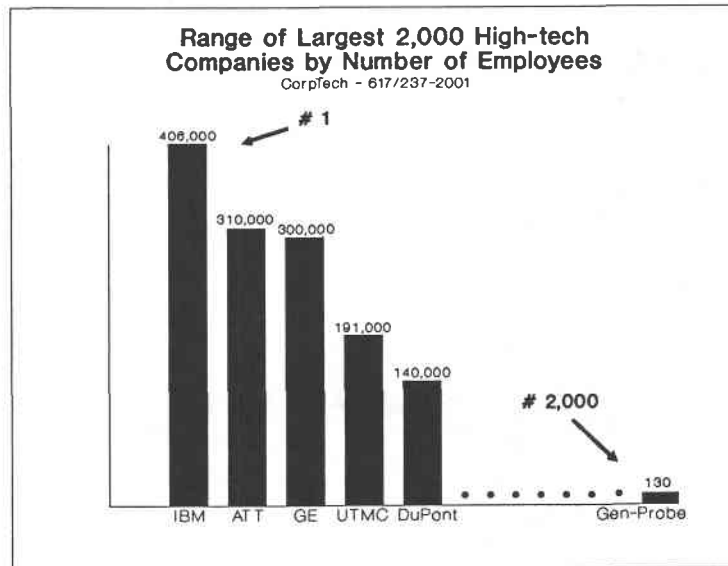
303/693-8291

VIEW & REVIEW

The CorpTech 2000 Marketing Guide 1988 CorpTech

A View

The headquarters and top officers of 1,037 private companies and 963 public companies are ranked by number of employees. 167 have over 5,000 employees, 90 have 2,500-4,999, 225 have 1,000-2,499, 274 have 500-999, 473 have 250-400, and 771 have 100-249. The CorpTech 2000 is the tip of the iceberg. It is extracted from a database of 30,000 companies that you can segment just about any way you want



And Review — CorpTech 2000 has just the information¹ you need if you sell to the top officers of high-tech firms.

Worthier features — Indexed by employee count, cities, and 200 product codes (half in information technology).

Limits or not so worthy features — Units, no matter how large, are not listed. That information is available in other CorpTech products.

For: Those who sell to high-tech companies

Author: Steven Parker

What: Directory
Pages: 397 Exhibits: none
Date: 9/88 Price: \$95

For Additional Information Contact:

CorpTech
P.O. Box 81281
Wellesley Hills, MA 02181

617/237-2001

Fax: 617/237-3235

1. Directory lists the home offices of the largest (by number of employees) 2,000 firms in: factory automation, biotechnology, chemicals, computers, defense, energy, manufacturing equipment, advanced materials, medical, pharmaceuticals, photonics, services, software, subassemblies, test & measurement, telecommunications, and holding companies. For each company the directory includes: company's full legal name, CEO, headquarters address, employee count and annual sales (may be range), ownership, telephone/fax/telex, senior officers responsible for sales, for R&D, for finance, brief company description, product codes for major businesses, references to other CorpTech directories.

VIEW & REVIEW

Microwave Monolithic ICs ElectroniCast Corporation

A View of the Future —

According to ElectroniCast, MMICs are single-chip devices or hybrids operating in frequency bands from one GHz through millimeter. MMICs are device families commonly used in military applications, satellite communications and instruments. Consumers see MMICs in microwave ovens and radar detectors. Today's worldwide MMIC research expenditures of \$200M will create a market that will grow to \$2.3B in 1997 (63% captive). Equipment manufacturers in the captive MMIC market include GE, Hughes/GM, ITT, Sanders, TI, Raytheon and Westinghouse. Merchant market suppliers will include MSC/Siemens, NEC, M/A-COM, Plessey, Toshiba, and Fujitsu

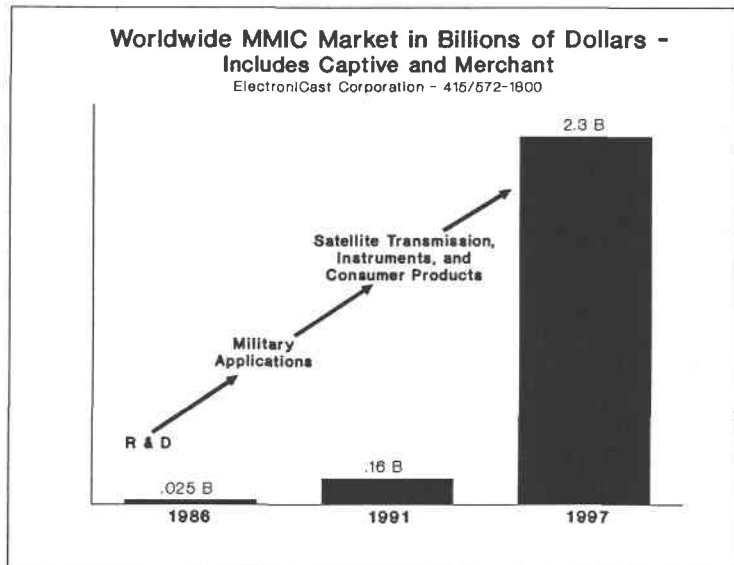
For: Microwave component subsystem manufacturers, MMIC suppliers, OEMs

Authors: Jeff Montgomery
Saba Hailu

What: Multi-client Study

Pages: 1,329 **Exhibits:** 563
Date: 1987 **Price:** \$18,000¹

1. Second copies \$500. This study plus the new Annual Forecast Service is available as a package.



And Review — Monumental. If you're building or using MMICs, by any measure this multi-client study is a good value in spite of the price (typical for studies of its kind). Covers the market, applications, technology, competition, and forecasts. If requested, data is available on diskette.

Lofty features — The forecast database supplies details of a ten-year forecast of production value, quantity, average price, input/output coefficient and growth rates for each of 26 MMIC categories and seven geographic regions further segmented into 16 equipment production categories and six non-consumption categories. Based on ElectroniCast expertise (considerable) and over 100 vendor interviews. Well-defined methodology.

Limits or not so lofty features — The three big volumes are formidable. It's nice they come with a client-site briefing. There is also a good summary. Multiple copies of the summary for each client would be a nice touch.

For Additional Information Contact:

ElectroniCast Corporation
2121 El Camino Real, Suite 1215
San Mateo, CA 94403

415/572-1800

Fax: 415/572-0519

VIEW & REVIEW

Rewritable Optical Media Rothchild Consultants

A View of the Future —

According to Rothchild, "We are approaching the limits of magnetic recording and the successor is likely to be optical. Rewritable optical disks are likely candidates to replace fixed, rigid disks in computers.

They combine the rewritability of magnetic recording with the high data density of optical recording. The most advanced and promising form uses Thermo-Magneto-Optic materials in which writing is done by a combination of a magnetic field and heat from a laser beam."

Abi says next year rewritable optical disks will not only be comparable in drive price to winchesters, have removable 50MB-600MB media (\$50-\$300), be the same form factor as winchesters (can be integrated by your neighborhood Computerland), they will also equal winchesters in access time. Sounds like a dream, or maybe a vision; but it will probably be reality sooner than you think

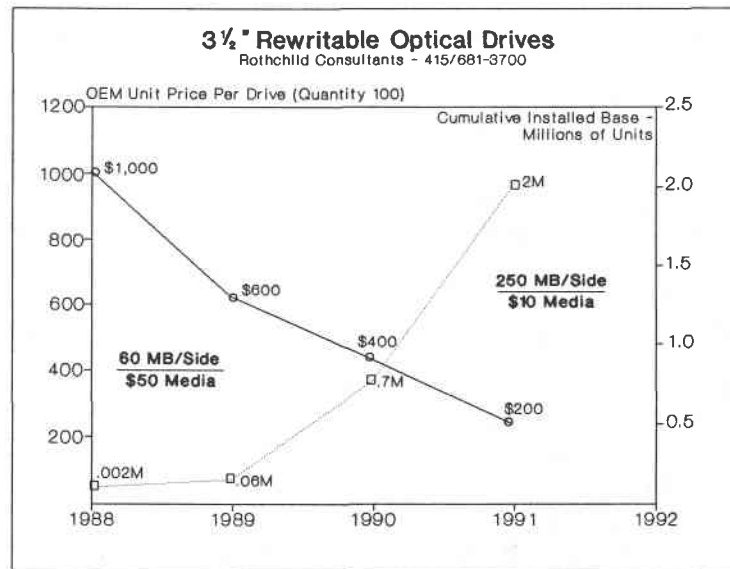
For: Manufacturers of optical drive and media, materials suppliers and OEMs

Authors: Abigail Shaw, Editor plus independent authors

What: Report & Newsletter

Pages: 189 **Exhibits:** 20

Date: 7/88 **Price:** \$1,495



And Review — Overview of optical recording: read-only, write-once, and rewritable. Focuses on drive and media Thermo-Magneto-Optic recording technology. Covers future technology, major players and issues.

Stellar features — The technology of rewritable optical disk technology is made crystal clear. Good synopses of rewritable disk programs of GE, IBM, Tandy, 3M, Verbatim, Daicel, Fujitsu, Mitsubishi, Olympus, Ricoh, Sharp, Sony, Toshiba, Philips, BASF and others.

Limits or not so stellar features — Although a solid treatment of the rewritable optical media technology, this report is lacking on application and market perspective. Rothchild now provides 6 months of *Optical Memory News*, Rothchild's newsletter, with the report. Abi, the report editor, is on top of the market and — within limits — is available by phone to support the study. There's a lot of market action and a more market-oriented study is coming soon.

For Additional Information Contact:

Rothchild Consultants
256 Languna Honda Boulevard
San Francisco, CA 94116-1496

415/681-3700

Fax: 415/681-3732

Thanks!

125 Participating Market Information Publishing Companies

Our Thanks

Every day a few more market information publishers become positive about Future Think's plan. And so they should. I see our role as being an advocate for excellence in market information publishing. Of the 159 market information publishing companies that we have contacted, 125 have agreed to cooperate with *Future Thinker* reviews. They are:

*New since last issue are
starred (★)*

See *Future Thinker* #1 & #4

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✓ California Technology Stock Letter San Francisco, CA	415/982-0125

	✓ Camarro Research Fairfield, CT	203/255-4100
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CLARIFICATION

Remarks about IDC in *Future Thinker* #4

My comments about IDC were meant with good humor and respect for the company who practically created the market research business in the computer industry

I hit on IDC a bit hard in *Future Thinker* #4. In the FIND/SVP article I stated that IDC isn't known for talking about itself lately. The fact is that most (not all) large computer industry market research companies have been shy of publicity about themselves (not about their research) the past few years. It wasn't fair of me to single out IDC. Sorry.

I also referred to *Boston Globe* briefs on brief IDC presidents. Since 1984 IDC is on its 3rd President. I do consider this turnover to be unusual among computer industry market research firms. I hear Tom Swithenbank, the current President, is doing a good job, and it is certainly a more upbeat time in our industry than a few years ago.

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Author: Portia Isaacson

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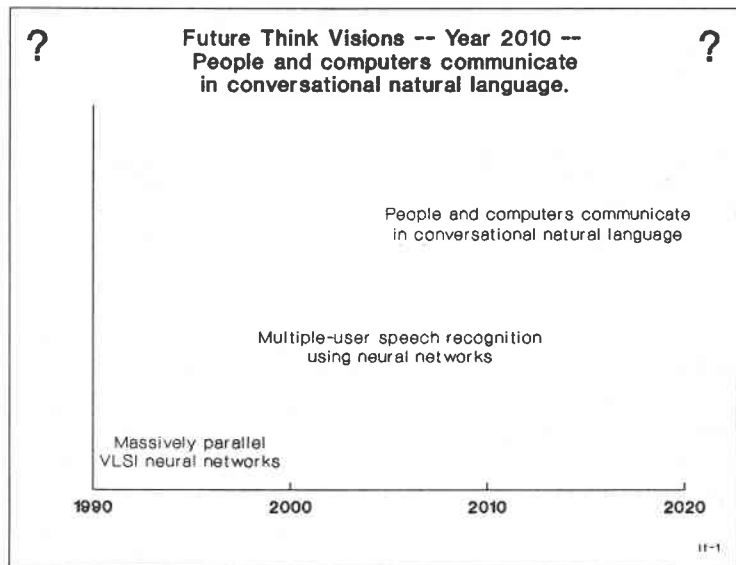
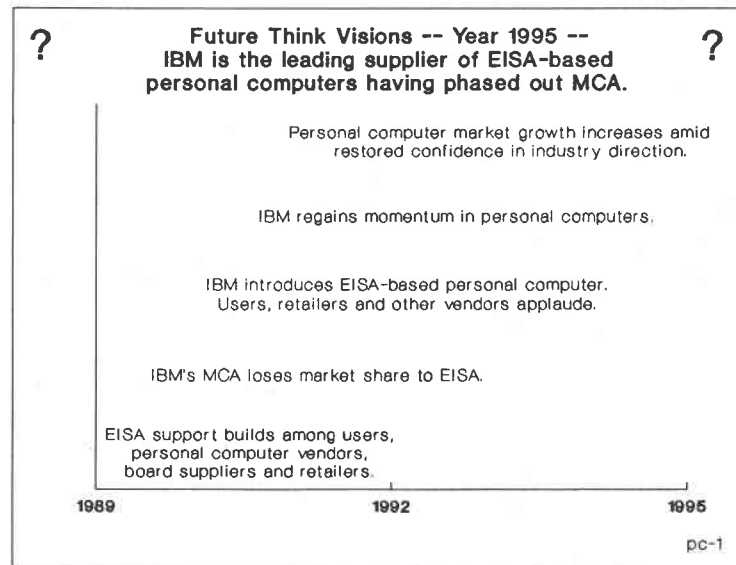
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