

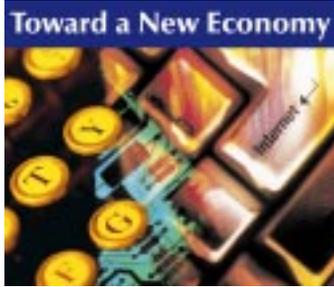


From Heritage to Vision - Internet Trends

The Internet in the Greater Washington Region - from Heritage to Vision

Section III

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The heritage of the Greater Washington Region is pivotal to the future development of the InfoComm Cluster.

The Greater Washington Region has been a leader in the InfoComm Cluster of industries in many ways. Examples include:

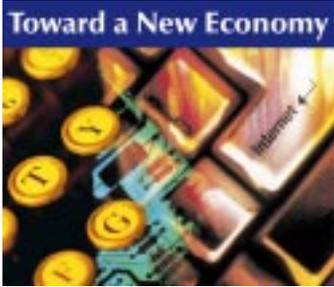
- Birthplace of the Internet and home of many of its most important developments
- Center for satellite communications ventures and development
- Center of policy debate and adoption of initial competition in telecommunications
- Location for government-funded research, with institutions such as NASA and NIH
- Sizable systems integration businesses, spurred by the Federal Government as a major customer

The Greater Washington Region is well positioned to take advantage of the rapid growth in the InfoComm industries, as demonstrated by:

- The opportunities offered by the Internet and related activities
- A rising, strong entrepreneurial community and spirit in the region, driven by major successes of earlier entrepreneurs that grew to scale in this region
- An increase in venture capital availability in the region, with 1998 VC investment more than doubled from the same point last year

Greater Washington Region:

- **InfoComm and enabling Computing/Systems Integration - almost equal in employment size to the Federal Government**
- **Nearly 30% of all national systems integration sales**
- **Hub of the global satellite communications industry**
- **Almost 50% of on-line service subscribers are served from Greater Washington Region companies**
- **VC commitments in the region in 1997: \$390 million**



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While it is difficult to label a new phenomenon during its early evolutionary stages, the path towards a New Economy in the Greater Washington Region seems clear.

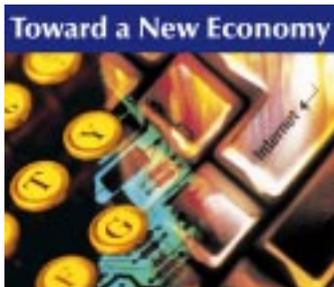
- The thread linking dynamic regional developments in the InfoComm Cluster is the Internet and related activities.
 - “There was other interdependency before the Internet became so big, but not to the same extent. Three years ago communications was not an issue for us at all... I think it all points to the Internet.” Cheryl Gustitus, Primark/Disclosure
- Many of the new InfoComm entrepreneurs had roots in the traditional InfoComm industries in the region and are branching out into newly created opportunities.
 - New net-based companies build on the expertise and resources from the traditional telecommunications industries and systems integration.
 - New content providers find significant opportunities in the vast and rich archive of original, statistical and educational material in the Greater Washington Region and draw on talent from the Hill and policy-related journalism.
- While companies and entrepreneurs are building on their and/or the region’s heritage, they are not limited by the past
 - The majority of new talent is hired very young and trained in-house on the newest technological developments and trends.
 - Understanding equity compensation (vs. fixed salary) is key in hiring and training.

“It is very tough to put a name to something in progress. The horseless carriage was the right word for the product that was in process until someone said it’s an automobile.”

Gary Arlen, Arlen Communications

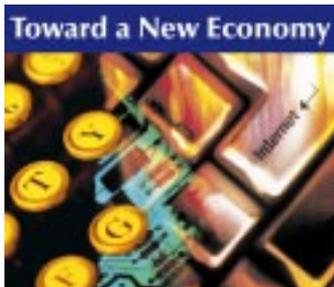
Merging heritage with vision:

- **Disclosure, Inc** - from SEC contractor to value-added provider of information to commercial markets through the Internet
- **Proxicom, Inc** - entrepreneur started as government systems integrator and moved to becoming a provider of Internet-based solutions



The Greater Washington Region, the birthplace of the Internet, has successfully built on that early foundation.

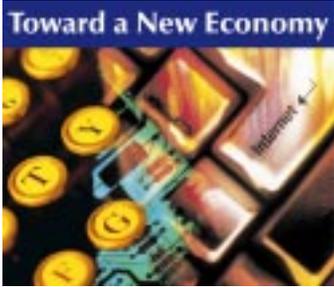
- ORIGIN AND EVOLUTION OF THE INTERNET
- Many Internet users are not aware that the Greater Washington Region played a key role in the establishment of the Internet.
 - When the Internet began approximately 25 years ago it was a hierarchy of networks developed for research and academic use. In the late 1960s, the Department of Defense Advanced Research Projects Agency (ARPA) explored designs for a packet-switched network that could withstand the loss of any of the nodes on the network, driven primarily by military concerns. That network, which was called ARPAnet, became today's Internet.
 - In 1985, ARPA transferred control of the network to the National Science Foundation (NSF), which maintained the Internet (then called NSFnet) from 1985 until 1995. Over that time the Internet began to shape itself into the network we know today -- a network for commercial interests as well as academic communities.
- Today's network consists of several high-speed backbones which exchange traffic through Network Access Points (NAPs).
 - Washington D.C. was one of the original four NAPs, originated by a grant from NSF awarded to MFS Datanet. The others were accorded to Sprint for New Jersey, BellCore for Chicago (operated by Ameritech) and San Francisco (operated by Pacific Bell).
 - Smaller ISPs purchase access to the global Internet as "transit customers" of the major backbone providers.
 - The Internet was handed over to the private sector in 1995, when the NSF grants expired. Additional private NAPs (e.g. MAE's) are already appearing.
- Routing tables are maintained by the RA(Routing Arbiter project), which is also responsible for the continuing research and development on Internet routing.
 - Outside the United States, Internet access is provided by international carriers such as AT&T and BT.
 - Today, an estimated 6,000 Internet Service Providers (ISPs) connect to these NAPs, either directly or through wholesalers. An increasing number of ISPs are starting to bypass the original network by directly connecting with each other.
- The U.S. government is introducing a new domain name system that will encourage competition. In addition, Internet oversight is expected to move from a U.S. to an international body.
 - Network Solutions Inc. is losing its near-monopoly over the domain name business, but so far business is still good, and the company is preparing for the new competitive environment. In the first five months of 1998, NSI registered more than 340,000 domain names, an increase of 73 percent from the same period in 1997.
 - The acquisition of idNames, a Houston-based firm, will allow NSI to expand its business internationally.



MCI and AOL are the largest Internet-related success stories in the region.

- The Greater Washington Region has again become the location for key Internet developments with the formation of IOPS.ORG in 1997.
 - IOPS.ORG is mandated with resolving network integrity problems, addressing issues that require technical coordination and facilitating information-sharing among ISPs. IOPG.ORG's current members are AGIS, ANS Communications, AT&T, EarthLink Network, Epoch Internet, Exodus Communications, GTE/BBN, IBM, Icon CMT Corporation, MCI, NETCOM, PSINet, Sprint, and UUNET.
 - IOPS.ORG is being "hosted" by the Corporation for National Research Initiatives (CNRI), the Reston, Va.-based nonprofit organization that works with industry, academia and government on national initiatives in information technology.
 - The Commercial Internet Exchange, the original and largest ISP trade association, is based in Herndon, Va.
- The growth of the Internet among both consumers and business users is impressive. Forrester Research forecasts the business ISP market alone to grow to \$16.6 billion in 2000 from \$1.6 billion in 1997. It expects the market to be dominated by a few major carriers - AT&T Corp., GTE/BBN, MCI Communications Corp., Sprint Corp. and WorldCom/UUNET.
 - Although WorldCom will have to sell MCI's Internet activities as one of the conditions of its merger approval with MCI (possibly to Cable & Wireless), three of these expected leading players are located in Greater Washington.
- WorldCom, one of the largest emerging global players in the communications industry, has recently focused its acquisitions and deals on the Greater Washington Region: the acquisition of MCI and the purchase and outsourcing of most of AOL's network infrastructure.
 - The recent WorldCom deal with AOL has created a Greater Washington Region-based powerhouse focused and based on the Internet.
 - WorldCom's emergence as a global player in Internet services is highlighted by UUNET's Global Transit Service, which offers European and Asian ISPs connectivity with North America, Asia and Europe.
- AOL, which started in 1985 as an on-line service provider, has ultimately emerged as the largest player in this industry. Its shift from an integrated content provider that also owns conduit, to a primary focus on content could be an indication of the direction non-facilities-based ISPs might take.

Sources: Datapro, Gartner, TRI, Forrester Research

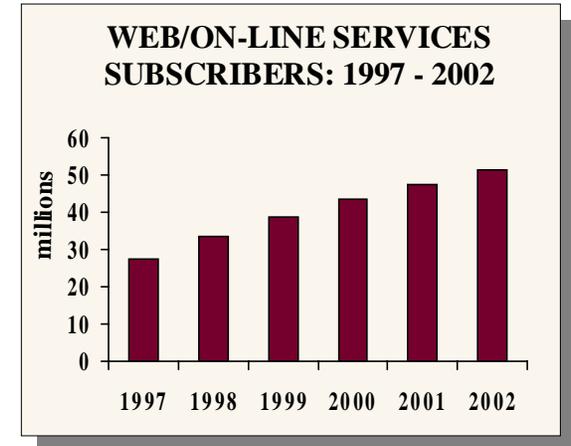


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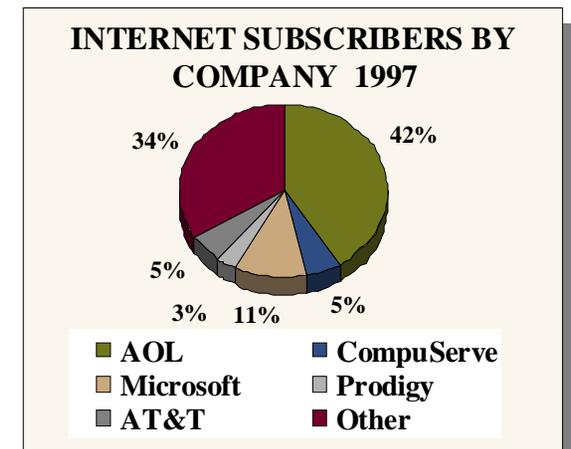
Companies in the Greater Washington Region have dominated the unprecedented growth of Internet subscribers.

- In 1997, the consumer/mass market audience of U.S.-based online and Internet services reached almost 24 million, up 31% during 1997, according to the ISR Online Census.
 - Online growth is slowing, according to ISR, but the market leader is still growing rapidly:
 - The AOL subscriber base increased by over 1 million in 1997.
 - The CompuServe subscriber base decreased by 20,000 users in 1997 (possibly due to the AOL acquisition).
 - The Microsoft Network's consumer base remained flat in 1997.

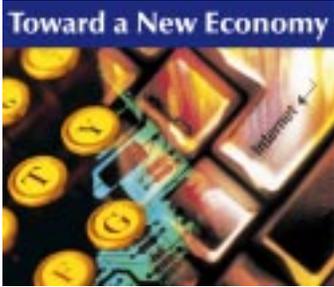
- The "Big Five" online/Internet providers are estimated to serve about 65 percent of the customer base
 - Locally headquartered America Online had the largest market share in 1997 with about 9.1 million subscribers in the U.S. and about 1 million outside the U.S. With AOL's acquisition of CompuServe Inc. that combined group now has about a 47 percent share of the total audience.



Source: MMTA



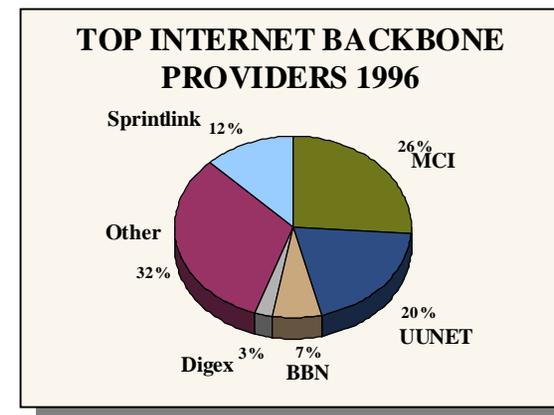
Source: Forrester



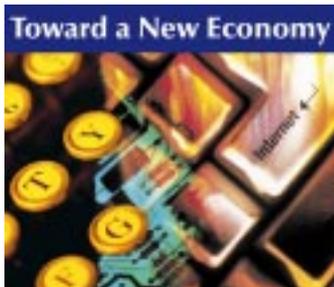
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Internet backbone providers, the owners of the pipelines through which basically all Internet traffic flows, have established a significant presence in the Greater Washington Region.

- The two largest national backbone providers are MCI and UUNET, representing 26% and 20% of the market respectively.
- The purchase of MCI by UUNET parent WorldCom would have given WorldCom nearly a 50% share of the Internet access market. However, as a condition for the approval of the deal, WorldCom will sell all of MCI's public Internet business to Cable & Wireless for \$1.75 billion.
- As data communications traffic surpasses voice and the Internet becomes more of a conduit for voice traffic, through Voice-over-IP technology, owning an efficient backbone and infrastructure becomes more important. Infrastructure investments by the regional companies are intended to prepare for higher demand and tougher competition.
- Three of the top ten Internet backbone providers are local companies, and 49% of ISPs connect to the Internet through these providers:
 - MCI - 26%
 - UUNET - 20%
 - Digex - 3%



Source: MMTA



Vision - Internet Trends

WorldCom: Creating an Internet powerhouse in the Greater Washington Region.

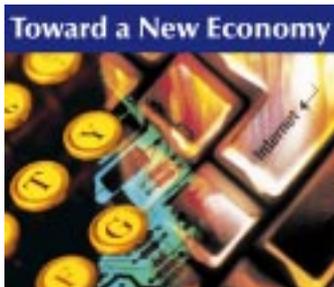
- In a complex deal, WorldCom acquired CompuServe Network Services and AOL's ANS Communications in Fall 1997, expanding its previous acquisition in the region with MCI - a deal that was only recently approved by U.S. and European regulators under conditions that WorldCom sell MCI's Internet activities.
- The complex deal included:
 - A five-year contract under which AOL will lease capacity from WorldCom at favorable prices and WorldCom becomes AOL's largest network service provider.
 - AOL receives CompuServe's Interactive Service Division and cash.
 - As part of the deal, WorldCom will keep the CompuServe Network Services (CNS) Division, which operates one of the largest data communications networks in the world with a presence in more than 100 countries and about 100,000 dial-up ports.
- The potential benefits and synergies for the combined entity could be considerable:
 - The combined network of ANS, CompuServe, and UUNET, with a total of more than 500,000 dial access ports, will be used by all three companies' customers.
 - UUNET, which became part of WorldCom as part of the MFS acquisition, may gain economies of scale by sharing the ANS and CNS network infrastructure.
 - The merger provides UUNET's Internet access and hosting services with the sales channels of ANS and CNS and may provide leverage opportunities for CNS' value-added services such as corporate intranets, transaction processing, and electronic commerce.
 - As an additional benefit, the deal helps reduce UUNET's local access charges.
- As part of getting regulatory approval for the acquisition with MCI, WorldCom had to agree to sell all of MCI's Internet activities in order to avoid a dominant position in the Internet business.

ANS

- ANS was formed in 1990 as a nonprofit company. Its mission was to advance high-speed networking technology and build the NSFnet.
- In 1991, ANS launched a for-profit company offering Internet access to large corporate users.
- In 1995, ANS was bought by AOL, providing ANS with continued funding and AOL with a network.
- In 1997, ANS was acquired by WorldCom.

UUNET

- UUNET was the first commercial U.S. ISP.
- In 1990, AlterNet was launched by UUNET as the first commercial TCP/IP network service. It was also the first to merge Internet and traditional telecoms when it merged with MFS Communications.
- In June 1996, MFS was subsequently acquired by WorldCom. Since the merger with MFS it had become one of the top three U.S. ISPs.
- UUNET is expanding its local presence with a 534-acre campus being built in Virginia's Loudoun County (near Ashburn), which will accommodate 30,000 people when it is completed (in about ten years).



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The Internet and e-commerce are changing the industry and the traditional InfoComm value chain.

- Some shifts occurring in the industry include:
 - Mergers and acquisitions among small and regional ISPs to increase size:
 - Many analysts expect a wave of consolidation to sweep the Internet access industry, as smaller ISPs merge and seek to team up with larger partners.
 - In January 1998, RCN struck deals to buy two of the largest regional ISPs in the Northeast United States, Boston-based UltraNet Communications and Springfield, VA.-based Erols Internet. Erols and UltraNet have combined annual revenues of approximately \$58 million. The transactions made RCN the largest regional ISP in the Northeast, with more than 325,000 subscribers.
 - New market entrants: Cable and traditional telco players are trying to become Internet access providers:
 - Jones Intercable in suburban Washington D.C. plans to update its system to enable a two-way network to offer Internet service.
 - RBOCs and IXCs have developed Internet offerings and are trying to penetrate their customer base.
 - From Network and Access Provider to Customer Aggregator: Focus of ISPs on core access products and even more on value-added services -- including new, innovative content - and outsourcing or selling network operations:
 - “My business is to be a customer aggregator” - Gabe Battista, Network Solutions
 - New technologies are offering new opportunities for new and established players, e.g. “Wireless Push” on the Internet or e-commerce applications. Examples of local players include:
 - Hughes Network Systems, Inc. (HNS) announced in December 1997 DirecPC Turbo Webcast, a satellite-based consumer push service which delivers some of the most popular sites on the Internet to subscribers' PCs without using phone lines to transfer the information. It uses a satellite to deliver up to 400 kbps Internet downloads wirelessly to a PC. The return link back to the Internet is via your phone line, sending outgoing data and web page requests via a telephone modem.
 - Trade Compass was founded in December 1994 to provide Web-based information to the global trading community, especially mid-sized companies. The Washington, D.C.-based firm, says George Atkinson, vice president of business development, integrates various e-commerce applications along with sophisticated data mining apps. Its Caravan application features electronic filing for documents such as purchase orders, cargo booking requests, invoices, letters of credit, shippers' export declarations, manifests and cargo tracking requests.
 - CyberCash offers a complete e-commerce payment system for everyone from physical world merchants to Internet merchants, financial institutions and billers seeking to offer Internet payment capabilities to their consumers.

Although most forecasts for e-commerce were scaled back by year-end 1997, business-to-business e-commerce is still expected to boom ...

Growth of Business-to-Business Electronic Commerce (in Billions of Dollars)

1996	1997	1998	1999	2000
1	5	15	35	50

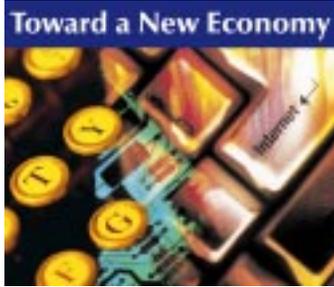
SOURCE: DATAQUEST INC.

... and some remain bullish on e-commerce:

- Negroponte, giving the keynote address at a convention in May 1998, scoffed at U.S. government predictions that Internet-commerce would reach **\$327 billion per year worldwide by the year 2002. Cisco Systems alone is already doing \$3.5 billion per year, he pointed out.**
- **"I think \$1 trillion a year by 2000 is modest," Negroponte predicted.**

Some local players have seen major growth:

- It took retailer Stephen Milo 12 years before he figured how to make some “real money.”
- Milo put his company, Manassas-based American Distribution Inc., on the Internet and sales took off, hitting \$1.1 million in 1997 selling comic books and novelties tied to offbeat TV shows and movies. He changed the name of his company to match its Web site address, AnotherUniverse.com, and leveraged his newfound expertise into a secondary line of work setting up Internet stores for others.



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The regional InfoComm Cluster includes traditional players evolving into non-traditional services and non-traditional companies emerging in the Internet space.

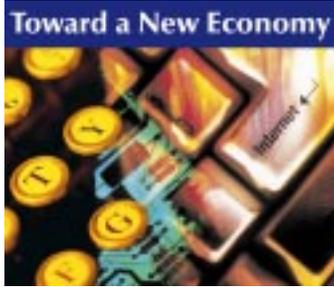
EXAMPLES OF REGIONAL INTERNET-RELATED PLAYERS

Changing Traditional Players

- **SAIC:** Traditional systems integration company started in early 1970's. Evolved from 90% of the company performing Federal systems integration, to 50%, with a significant concentration on the global Internet industry.
- **Disclosure:** Founded as a contractor to the SEC in the late 1960's. Through advances in information technology, the Internet and intranets, has evolved into an information aggregator for the commercial sector.
- **Washington Post Company:** Traditional publisher of the leading regional newspaper has developed a significant online presence through washingtonpost.com.
- **Discovery Communications:** Traditional content company, has used the Internet as a new vehicle for distributing product and reaching new audiences.
- **National Geographic:** Traditional non-profit company rooted in publishing has expanded into many different media as a result of the convergence of new media platforms.

Non-Traditional Companies

- **Proxicom:** Provider of Internet-based business solutions. Uniting business consulting, systems integration and strategic marketing, Proxicom provides a complete and expert approach to building successful Internet applications through custom and packaged solutions.
- **Blackboard:** Provider of technologies that help make the Internet more useful for teaching and learning through software tools for hosting 'virtual' campuses, university intranets, and on-line corporate training environments.
- **Net.Capitol:** Develops HTML browser-based databases capable of providing innovative and cost-effective solutions; custom services include database design and integration, web site design, intranet services, and strategic consulting.
- **Telogy Networks:** Leading provider of embedded communications software to global equipment manufacturers. Offers a complete Voice-Over-IP (VOIP) solution to manufacturers who need to integrate voice, data, and fax over packet networks.
- **CyberCash:** Has achieved a leading status as one of the key Internet payment providers. CyberCash has offered its secure Internet credit card transactions services since April 1995. Over 400,000 CyberCash Wallets exist in the distribution channel, including CyberCash, Checkfree, and CompuServe wallets. CyberCash is connected to 80% of the banks in the U.S.



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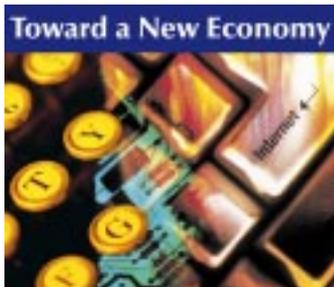
Local Internet players creating, supporting and adding value to the Internet include PSINet, and Erols.

PSINet

- Founded in 1989; 1997 revenues: \$121.9 million.
- PSINet was one of the early innovators to offer Internet access services. Performance Systems Intl. (PSINet) was founded in 1989.
 - A recent \$400 million takeover bid by U.S. Internetworking, an Annapolis, Md.-based holding company started by ex-Digex executive Christopher McCleary, was rejected.
- PSINet is now one of the top three Internet access providers with a focus on business communications. It has developed services for broadcasting business events through the Internet.
- With an international IP-optimized network serving more than 26,000 corporate accounts, PSINet delivers the full range of Internet services to small- and medium-sized businesses as well as to a quarter of the Fortune 500.
- Services include:
 - Internet connectivity
 - private IP networks
 - security services
 - Web hosting
 - multimedia
 - e-commerce solutions
 - value-added Internet services
 - free ISP peering
- “One of the most important things to know about PSINet is that we built our network specifically for Internet applications. It’s the salient feature of our service, setting us apart from telephone companies, systems integrators, and the dozens of ISPs you see advertised in the back of your local business section.”

Erols

- Founded in 1963, as a TV and radio repair shop.
 - Acquired by RCN Corporation in February 1998 for approximately \$84 million.
 - 1996 sales were \$10.9 million (8,589.7% increase from 1995)
 - Began selling TVs and VCRs in 1976
 - Developed a videoclub that was eventually sold to Blockbuster
 - Began building and selling computers in April 1994. Entered Internet market in August 1995
- Services include:
 - High-speed access (Erols high-speed access products include ISDN centrex, frame relay and point-to-point T-1’s)
 - Web hosting (includes shared UNIX and NT offerings, as well as dedicated and co-location services)
 - Web development/design
- Currently serves more than 293,000 mostly residential customers from Boston to Washington, a total of eight regional markets.
- Developed the practice of selling Internet access accounts with “up front” payment (customers paid for a full year of service at the beginning of their contract), which enabled Erols to grow dramatically, expanding their customer base through advertising (subscriber list more than doubled in one year), and cutting their administrative costs (e.g., billing) significantly.

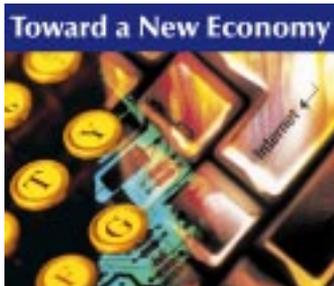


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The Greater Washington Region is also one of the first in another potential industry shift - Internet access via cable, phone/cable integration.

- **Some companies are using the Greater Washington Region as a beachhead...**
 - **Jones Internet Channel, which has been promoting its cable modem service in suburban Washington, D.C. since 1996, now has 2,200 subscribers.**
 - Jones plans to update its system to enable a two-way network to offer Internet service.
 - Cable Internet connections are 10 to 30 times faster than traditional Internet connections.
 - Jones, which is headquartered in Colorado, has announced an alliance with Wink Communication, a provider of enhanced interactive broadcasting which will add to the company's ability to offer Internet services.

- **... others are using it as a hub**
 - **Road Runner, a national high-speed online service owned by Time Warner and Media One, is relocating to the Greater Washington Region.**
 - The company is currently in negotiations to relocate to Fairfax, Virginia.
 - Road Runner integrates compelling multimedia content, communication tools and personalized services such as e-mail, home-page hosting and chat within a broadband environment.
 - The Road Runner service is delivered over a hybrid fiber-coaxial cable infrastructure that local cable operators have upgraded to be two-way-active. This cable network connects to a high-speed cable modem.
 - Road Runner service is currently available in parts of California, Florida, Hawaii, Maine, New York, Ohio, Tennessee, and Texas.



Vision - Internet Trends

Internet content creates a major new opportunity for the future in the Greater Washington Region, based on traditional content companies and new players.

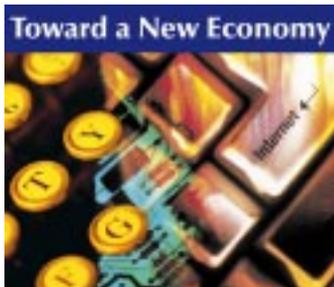
- The Internet creates new opportunities for new content, as well as for repackaging existing content to fit this new medium. Whereas in the first phases of Internet development, content creation meant primarily reformatting existing print text, more recent examples provide a glimpse of how new content can be created by innovatively combining existing archives with the new medium. However, in a virtual world, access to content is not location-bound. Thus, how much content exploitation will happen locally will depend on local entrepreneurial initiatives.
- Some companies, such as National Geographic and Discovery have started to adapt their content for new, Internet-focused service and product offerings.

National Geographic

- Founded in 1888, the National Geographic Society is the world's largest not-for-profit educational society, with almost nine million members world-wide. National Geographic magazine is read by 45 million people. National Geographic Ventures, a for-profit subsidiary, combines the organization's television, maps, and interactive businesses.
 - "We're using the Internet and digital technologies to extend the National Geographic brand and content across multiple platforms. We're not simply putting our magazine and TV content online -- we're complementing it with additional content, increased reach, frequency and utility. Our Web presence draws everything that is National Geographic -- and its millions of readers and viewers -- into an adventure that has endless opportunities for individual exploration, discovery and learning about the world and all that's in it. The Web and its related convergence platforms and display devices help to enhance National Geographic's mission, cross-promote our activities and meet the business objectives across the organization." Mitch Praver
- National Geographic's **library houses about 50,000 books** on a wide variety of subjects.
 - The Library's collection also includes **valuable and limited editions of works** such as the 20 volumes of The North American Indian by Edward S. Curtis, volumes from the famous illustrated India Orientalis by de By, several editions of Ptolemy's Geography, and accounts of polar exploration and discovery.
 - Copies of every book, magazine, and research report the Society has published are in the Library.

Discovery

- Discovery Communications Inc. (DCI), founded in 1985, is a privately held, diversified media company **headquartered in Bethesda, Md.** Fueled by the world's largest original, non-fiction production engine, DCI operates **three** distinct business units, including **Discovery Networks U.S., Discovery Networks International, and Discovery Enterprises Worldwide**, which consists of Discovery Channel Online, Discovery Channel Video, Discovery Channel Publishing, Discovery Channel Education and Discovery Channel Retail. Discovery is using its website to market not only its products but also its new retail store in Washington D.C.
- Building on its wealth of content and strength in educational activities, Discovery has recently started a new retail concept. The 30,000-square-foot, four-story museum-like store has received rave reviews from industry experts as well as the general public. Described by The New York Times as "pushing the boundaries of retailing," Discovery Channel Store: Destination Washington, D.C., continues to serve as one of Washington's hottest new attractions.
- "Because Discovery Communications is a content company, our brands are well known and respected by consumers as content brands. We view the internet as a content medium but use it in multiple ways. It is a promotional tool for our television networks, providing content related to programming as well as listings of what shows are on TV. It is also an e-commerce tool or distribution channel for sale of our products.." Michela English



Vision - Internet Trends

Internet and Web-enabling applications and integration are a key driver of growth for the U.S. systems integration market.

- The U.S. systems integration market growth in 1996 and 1997 was strongly driven by Internet and intranet-related projects according to IDC
- The Internet is a prime example of IT's evolution from a means to providing a strategy, to becoming a part of the strategy itself. As companies attempt to get closer to their customers, suppliers, and partners through the Internet, the knowledge of and the ability to apply such enabling technologies must feature dominantly during the strategy phase.
 - “We are a leading provider of Internet-based business solutions. . . we look at how companies communicate, collaborate, and conduct commerce and break it down with a methodology that helps the company prioritize their Inter-, intra-, and extranet initiatives. Then we quickly scope that out and begin to build it . . . technically and creatively.” Raul Fernandez, Proxicom
- **Internet/Web-enabling applications and integration represent a prime area of opportunity for systems integration.**
 - The U.S. Internet services market was estimated at \$1.7 billion in 1996 and is projected to expand at a 1996-2000 CAGR of nearly 47%.
 - An IDC survey revealed that only 15.4% of medium-sized and large companies have no Internet or intranet, of these 97% plan to establish access to the Internet or an intranet within the year.
 - The percentage of companies that will have both Internet and intranet environments in place will rise from 43.4% now to 77.7% in two years.
 - Interest in electronic commerce over the Internet is particularly strong as currently only 9.5% of medium to large size companies allow customers to conduct transactions over the Internet, but 46.4% of them have plans to do so in the near future.
 - “. . . My purchase of Network Solutions in March of '95 . . . was a strategic move by SAIC to move toward the integration of computing and communication in the highest growth segment of that market, which is the Internet business, and obviously e-commerce coming on the next leg of that.” Mike Daniels, SAIC
 - After a lack of staff for ongoing maintenance and support, integration with existing databases and applications is the most critical problem companies implementing Internet applications face. Consistent with this challenge, companies also rated integration capabilities the lowest when rating their service provider for Internet applications. This creates major opportunities for companies offering these services.

Source: IDC