

# Greater Austin Software Industry Report 1993

By: **David V. Gibson, Cherie L. Long, and George  
Kozmetsky**

Date: August 1993

Abstract:

Report benchmarking the demographics, infrastructure, business and technology characteristics of Austin area software development firms in 1993. Includes a timeline of Austin's development as a technology center and a directory of 359 software firms in the region.

Keywords: Austin, Texas; software industry



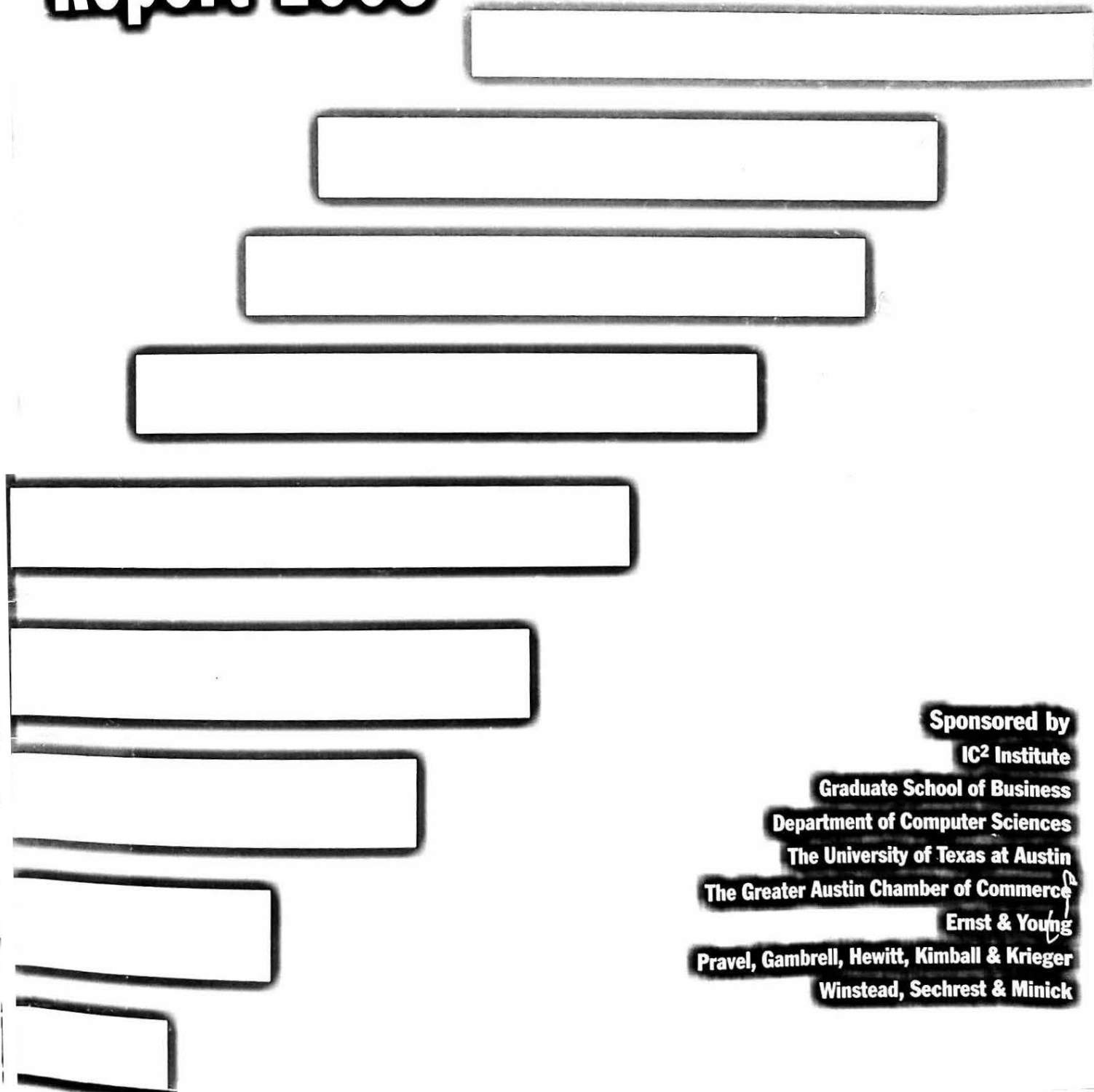
The University of Texas at Austin

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# Greater Austin Software Industry Report 1993



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# Greater Austin Software Industry Report

*Prepared by*

David V. Gibson  
Cherie L. Long  
George Kozmetsky

*With the assistance of*

Trey Keymoore  
Jim Keefe  
Tony McDow  
Cindy Kehoe  
Jon Greene

IC<sup>2</sup> Institute  
The University of Texas at Austin

August 1993

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## ACKNOWLEDGMENTS

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The authors of the *Greater Austin Software Industry Report* are especially grateful to the sponsors of this study and report. Private sector funding sponsors include Ernst & Young, Austin Office, represented by Ronald G. Garrick, Managing Partner and B. Kay Mathews; Pravel, Gambrell, Hewitt, Kimball & Krieger, represented by Gary Hamilton; and Winstead, Sechrest & Minick, P.C. represented by Pete Winstead and Walter Earl Bissex, a founding Director of the Austin Software Council. We also appreciate the financial support provided by the UT-Austin Entrepreneurs' Council. We thank the IC<sup>2</sup> Institute, the University of Texas at Austin for providing financial and staff support for survey mailing and report writing and publication.

*The Greater Austin Software Industry Report* was conceived and supported by the Greater Austin Chamber of Commerce under the leadership of Carol Thompson, Chairperson, Board of Directors, 1992; and Ron Kessler, Chairman, Board of Directors, 1993. This report has also benefited from the support and advice of Angelos G. Angelou, Vice President for Economic Development and Darrell J. Glasco, Director of Business Development of the Greater Austin Chamber of Commerce. The Chamber provided crucial assistance in identifying Austin area software development firms and other demographic data relevant to this report.

We thank Dean Robert E. Witt and Associate Dean of Research Vijay Mahajan, the Graduate School of Business; and Professor Al Dale of the Department of Computer Sciences and Joanne Click of the division of Continuing Education at the University of Texas at Austin for their support of graduate students who assisted in survey preparation, data collection, and analysis. We particularly thank the following students: Trey Keymore, MBA student, Graduate School of Business; Jim Keefe, Ph.D student, Graduate School of Business; Cindy Kehoe, Ph.D student, Library Science and Information Services; Tony McDow, M.S. student Electrical Engineering; and Jon Green, MBA student, Graduate School of Business. Finally we thank Professor Rajendra Srivastava, Chair, Department of Marketing, UT-Austin and Jim Ronay, President, Synergistic Solutions and founder of the Austin Software Council for their advice and suggestions.

The statistical analysis, design and layout for this report was done by Cherie Long on a Macintosh using MS Excel, MS Word, Aldus Freehand, Aldus Pagemaker and Photoshop.

*The Greater Austin Software Industry Report 1993* benchmarks and identifies significant demographics, infrastructure, business and technology characteristics of Austin area software developers which are considered most likely to contribute to sustaining and expanding software development activities in the Austin area in the coming decade.

### Demographics

Austin's emergence as a major technology center began in 1955 (with the founding of Tracor, Inc) and progressed slowly over the next 20 years through company relocations, expansions, and start-ups. From 1975 to 1983 technology-based growth gained momentum - peaking in the mid-1980s with the arrival of MCC and 3M. Beginning in 1985, Austin suffered a severe economic downturn, however by the late 1980s Austin was experiencing steady growth with the expansion of technology-based firms leading the way.

More than 72% of Austin's 359 software firms are clustered within a "software loop" which circles the city and includes eleven zip code zones. The core area encompasses seven zip code zones which contain 215 firms. The greatest concentration of software developers are located in the 78759 zip code zone which is also the location of many of Austin's largest high-technology employers.

The majority of Austin's software development firms are start-ups and have under five employees. More than 87% have fewer than 100 employees. The 100+ employee firms are the major employers of full-time and contract software professionals. The largest percentage expansion in sales and employment is anticipated by the 1-5 employee and 6-10 employee firms. The majority of programmers in the Austin area have more than ten years' programming experience.

### Infrastructure

The important infrastructure factors to Austin's software developers growth are: having a national/international reputation for producing quality, reliable and secure software; a clear vision of Austin's emergence as a national/international software development center; a productive locally-based R&D environment; and UT-trained computer science professionals. Respondents ranked as superior the availability of quality hardware and software professionals and the quality of life, cost of living, cost of doing business and technology research.

Other important infrastructure factors to Austin's emergence as a software development center include a pro-active and networked group of local software professionals, leveraging and networking local software companies and support services, and the growth of locally-based hardware and software firms. The perceived importance of linking to international software standards increased with firm size.

Austin's software development firms were most satisfied with regional labor and personnel; legal and accounting services; training; software services; and hardware technical support. Respondents were less satisfied with regionally-based marketing, management, public relations, international expertise, banking, and venture capital support services.

Austin software developers were most satisfied with UT Austin's educational impact on their company's growth. They were least satisfied with K-12 and vocational/technical education services.

### Business Operations

All but the 100+ employee software development firms have used personal savings/income, consultation fees, friends and relatives, and personal and family property as sources of start-up financing. Venture and investment capital were noted by all but 100+ employee firms as not being sufficiently available in the Austin area.

The principal method of marketing for Austin's software developers is direct sales followed by telemarketing, mail, periodicals, and point of sale. For 100+ employee firms the principal method of distribution is company offices and direct distribution. For 1-5, 6-10 and 11-100 employee firms the principal method of software distribution is retail and distributors.

The majority of Austin's software development firms distribute their products in Austin, throughout Texas and the United States. However, a significant number of all firms distribute to foreign countries.

Austin's 1-5 employee firms face the most competition from Austin area developers while 6-10, 11-100, and 100+ employee firms face the most competition from California. The strongest international competition for 100+ firms is from the Pacific Rim, Middle East, Indian Subcontinent and the Far East. 11-100 employee firms listed Canada as a location of significant competition while 1-5 employee firms listed New Zealand, Canada and the Far East.

The major revenue generators for Austin's software developers are prepackaged and custom software applications.

### Technical Operations

Desktop systems and workstations provide the largest percentage of current revenue for all sizes of software development firms. Mainframes are expected to decrease as revenue generators for all but 11-100 employee sized firms.

DOS is the predominant operating system for all but 11-100 employee firms. By 1995 all but 100+ employee firms expect to be using DOS less and UNIX more.

Desktop systems show the strongest current and future use. The 386/486 architecture is the most popular architecture and is expected to remain strong into 1995. All firms anticipate an increase in the use of the RS/6000, Motorola 680xx and SPARC.

Scientific research and engineering software are the strongest markets now and in 1995 for all sized software development firms.

## INTRODUCTION: AUSTIN'S EMERGENCE AS A TECHNOLOGY CENTER

*Computer-based technology is dramatically altering the shape and direction of society and the way people think and act. The rapid increase in and diversity of new technologies is changing the nature of economic competition. How communities, regions, and nations anticipate and respond to this competitive environment will largely determine the health and viability of economies and the quality of life that is sustainable.*

IC<sup>2</sup> Institute

Austin's emergence as a high technology center began in 1955 with the birth of Austin's first home grown Fortune 500 company, TRACOR<sup>1</sup>. Over the next fifteen years, high technology growth gradually progressed with the arrival of IBM in 1967, TI, Radian (a TRACOR spin-out) and Continuum in 1969. During the 1970s and 1980s, Austin experienced steady growth in technology-based company relocations, foundings, and expansions including Motorola, National Instruments (an Austin based start-up), AMD, EDS, Schlumberger, Tandem, Fisher Controls, CompuAdd (an Austin-based start-up), Abbott Labs, Westinghouse, Xerox, and Lockheed.

In 1983, the nation's first major for-profit R&D consortium, MCC (the Microelectronics and Computer Technology Consortium) chose Austin as its headquarters after a major and public site selection process among some of the most visible high-tech centers in the United States.<sup>2</sup> Soon after MCC came to Austin, 3M announced that it would locate a major R&D division in Austin. The area experienced an unprecedented wave of high technology related economic growth due to the perception that it had suddenly become a major technology center. Austin made world-wide headlines as the next "Silicon Valley".

Between 1984 and 1987, Austin experienced an economic downturn revolving around a general economic recession in the state, cutbacks in higher education, anti-growth local government attitudes, and a speculative development cycle. By 1986 the price of oil fell from a high of \$32 in 1980 to below \$10 a barrel in 1986. The plunge in oil prices combined with declining farm and beef prices and changing tax laws and savings and loan foreclosures caused a major economic downturn in Texas. The oil and gas industry lost approximately 150,000 jobs and the Lone Star State was faced with budget deficits.

Austin's emergence as a major technology center gained a significant boost in early 1988 when the nation's semiconductor industry, after a national competition, chose Austin as the location for the industry's new research consortium of 13 member companies (SEMATECH). Following SEMATECH's location in Austin came expansions of Motorola and IBM and the relocations and foundings of Pencom Systems, Trilog, Applied Materials, Tadpole Technologies, Apple Computers and Lotus Development Corporation.

<sup>1</sup>The seeds of TRACOR were spun-out of The University of Texas at Austin by Frank McBee and three other faculty who were working on federally-sponsored research at UT's Balcones Research Park. The life cycle of TRACOR came full circle in 1990 when a leverage buy-out of TRACOR and subsequent cutbacks in the U.S. defense industry led to a downturn for the company. Many of the spin-outs of TRACOR, however, and the spin-outs of these spin-outs continued to grow and prosper in Austin. However, as of 1992 TRACOR was restructuring and beginning to emerge as a profitable company once again. The case of TRACOR and the companies which have spun-out of this parent company, exemplifies the linkage between the University, federally-funded research, and the development of Austin-based small, medium, and large technology companies (Smilor, Gibson, and Kozmetsky, 1988; Dietrich and Gibson, 1990).

<sup>2</sup> For more on how Austin was chosen as the site for MCC, see Gibson and Rogers, 1988 and 1994.

## Critical Events in Austin's Development as a Technology Center

- 
- 1955** TRACOR founded (Austin's first homegrown Fortune 500 company)
- 
- 1967** IBM establishes Austin division producing IBM selectric typewriters
- 1968** Continuum begins Austin operations  
TI opens Austin division  
Radian (a Tracor spin-off) begins Austin operations
- 
- 1970** Wayne Systems/Dresser Industries begins Austin operations
- 1971** Xerox opens Austin division  
Westinghouse opens Austin division
- 1972** Arab oil embargo
- 1974** Motorola opens Austin division  
Hart Graphics begins Austin operations  
Eaton Corporation opens Austin division
- 1976** National Instruments, an Austin-based start-up instrumentation company, founded
- 1977** EDS begins Austin operations
- 1979** AMD opens Austin division
- 
- 1980** Schlumberger Well Services begins Austin operations  
Oil sells for \$32 barrel
- 1981** CompuAdd founded (an Austin-based start-up)  
Tandem begins Austin operations  
Fisher Controls begins Austin operations  
Rolm Systems begins Austin Operations  
Dun & Bradstreet begins Austin operations
- 1983** Microelectronics and Computer Technology Corporation (MCC) selects Austin for headquarters
- 1984** Start of Texas Recession  
3M opens Austin R&D division  
Crystal Semiconductor founded  
MCI Services opens Austin division
- 1985** DELL Computers founded  
SAS Institute opens Austin division
- 1986** Oil sells for \$10 barrel
- 1988** Semiconductor industry selects Austin as location for SEMATECH  
DELL Computers goes public  
TRACOR goes private in leveraged buyout
- 1989** Austin Technology Incubator begins operation
- 
- 1990** Applied Materials opens Austin operations  
Origin Systems opens Austin operations  
DELL Computers becomes a Fortune 500 company
- 1991** Apple Computer Inc. relocates national customer support center to Austin  
TRACOR declares Chapter 11
- 1992** AMD announces \$700 million plant expansion in Austin  
Lotus Development Corp. relocates customer service center to Austin  
Trilogy founded  
TRACOR returns to national stock exchange  
Apple/IBM/Motorola alliance established in Austin
- 1993** IBM PC Software Division relocates to Austin



## Purpose of the Study

In March 1991, the IC<sup>2</sup> Institute published the *Austin Technology-Based Industry Report* which benchmarked the region's four major technology industries: (1) semiconductor, electronics, and logic modules; (2) software; (3) bio-technology; and (4) computers and peripherals. The report presented descriptive data that documented the growing number of small, mid-sized and large firms in each industry category. In addition, the report presented an overview of R&D funding at The University of Texas - Austin and survey data from a group of Austin area business and academic leaders who rated software as the most important industry for helping the Austin area grow in the 1990s (see chart below). The report concluded that "the Austin area was becoming a major center for software development, especially UNIX-based software."<sup>1</sup>

*The Greater Austin Software Industry Report* identifies key business issues and technologies which are considered most likely to contribute to sustaining and expanding software development activities in the Austin area in the coming decade. The report describes:

- ◆ the public/private infrastructure components of Austin's emergence as a major software center.
- ◆ facilitators and inhibitors in the emergence of Austin as a world class software engineering center.
- ◆ established and emerging software products and services of Austin based software development firms.
- ◆ competitive competencies of Austin-based software development firms in terms of the national and global marketplace.
- ◆ the unique capabilities of Austin's software research base and the most promising areas of future software development.

## Organization and Methodology

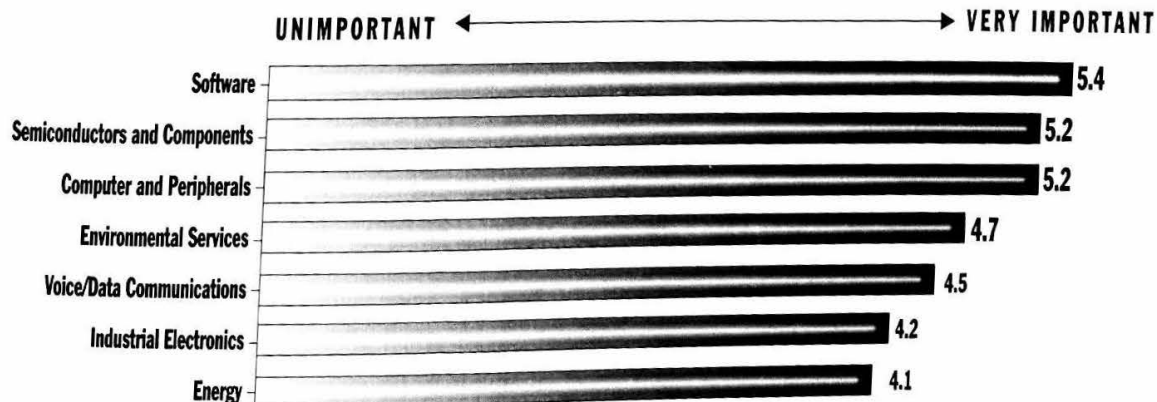
*The Greater Austin Software Industry Report* is divided into four sections: Demographics, Infrastructure, Business Operations, and Technical components.

Primary data sources for the report are two surveys conducted over a year and a half. Phase 1 questionnaires were mailed in late 1991 and early 1992 to collect baseline data and compile a directory of the total population of Austin area software development firms. 154 surveys were returned of which 125 were from software developers. Based on the information received in Phase 1, a more detailed questionnaire was developed and mailed in August 1992. The Phase 2 mailing list was compiled from the Phase 1 survey, companies listed with the Greater Austin Chamber of Commerce, records at the Texas Comptroller's Office, and Dun & Bradstreet. From the response to Phase 2, 29 new companies were added to the Phase 1 data and a total of 80 companies to Phase 2 data. A directory of 359 Austin area software developers was compiled and verified in June 1993. The survey data deals with actual (1992) and projected (1995) information about Austin's software industry. For the purpose of this study, software developers are defined as companies whose core activities are software development as well as companies who develop software for their hardware components.

The survey data is presented in graphic and tabular form. Percentages and mean scores are grouped by company size: 1-5 employees, 6-10 employees, 11-100 employees and 100+ employees. The data represented are based on 3 sample sizes: the 359 firms listed in the directory, 173 responses to Phase I survey (48% response rate), and Phase II's 80 survey responses, (22%).

<sup>1</sup> *Austin Technology-Based Industry Report*, D. Gibson, R. Smilor and G. Kozmetsky, IC<sup>2</sup> Institute, The University of Texas at Austin, 1991.

## The Importance of Eighteen Technology-based Industries in Helping Austin's Economy Grow in the 1990s

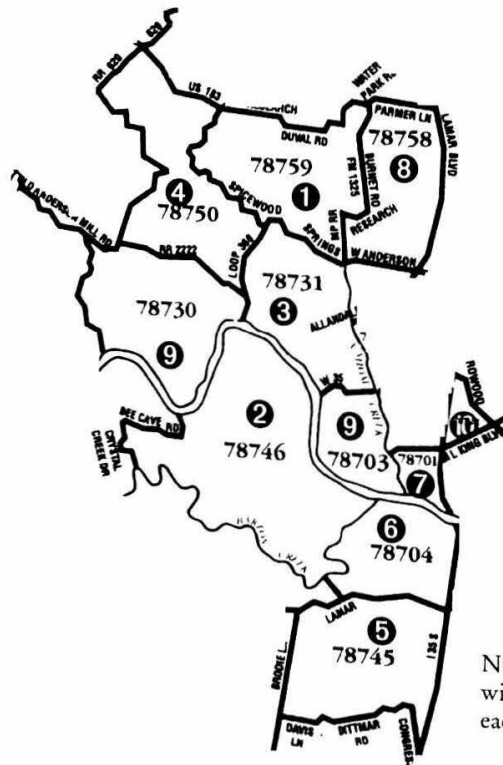


Location of Austin Area Software Developers by Zip Code*					
Zip Code	# Firms*	Zip Code	# Firms*	Zip Code	# Firms*
78681	3	78730	11	78749	3
78701	15	<b>78731</b>	<b>35</b>	78750	22
78702	1	78732	2	78752	7
78703	11	78733	4	78753	4
78704	17	78734	5	78754	2
78705	7	78735	2	78755	2
78714	2	78736	3	78758	12
78716	5	78737	2	<b>78759</b>	<b>59</b>
78720	10	78739	3	78761	4
78722	2	78741	2	78763	2
78723	4	78744	3	78765	3
78727	7	78745	18	78767	3
78728	6	<b>78746</b>	<b>49</b>	78768	1
78729	6	78748	5	78786	1

\*Data is based on the firms listed in the Appendix

The geographic location of Austin's software development firms was established using the zip code addresses of the software development firms listed in the Appendix at the end of this report. Over 72% of Austin area software development firms are clustered in the 11 zip code areas illustrated below. Fifty-nine software development firms are located in area 78759. The area with the next highest distribution of software development firms is 78746 with 49 software development firms located in this zone.

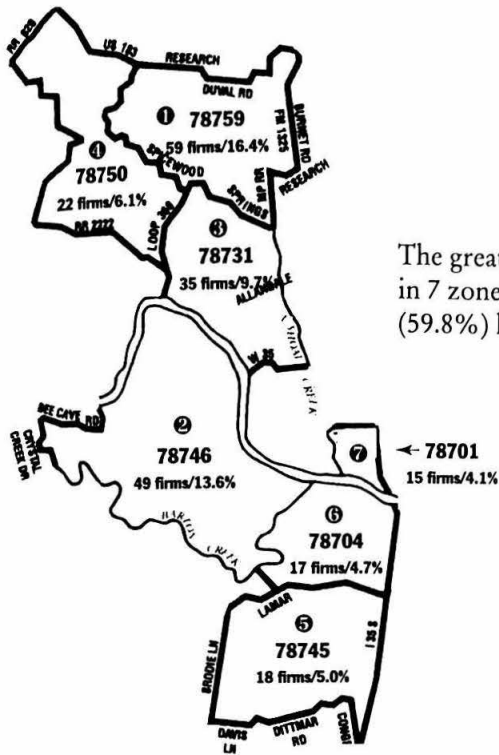
### AUSTIN'S SOFTWARE LOOP



NOTE: The 78703 and 78730 areas both rank 9th with 11 software development firms located in each of these zones.



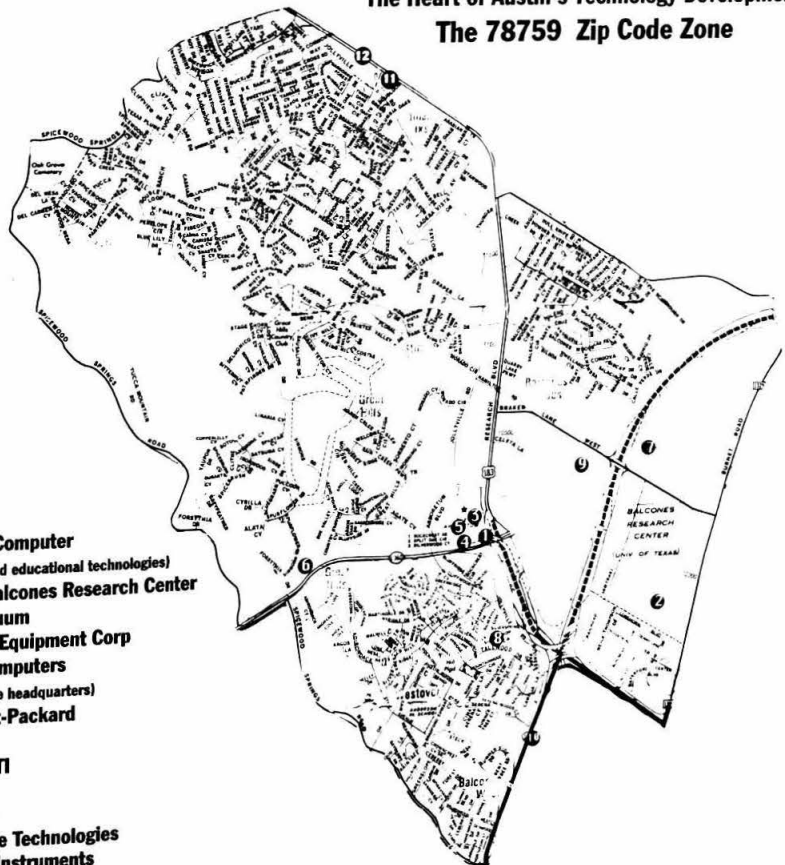
**THE CORE OF SOFTWARE ACTIVITY  
IN THE AUSTIN AREA**  
215 SOFTWARE FIRMS (59.8%)



The greatest concentration of software firms occurs in 7 zones, with 215 software development firms (59.8%) located in these zones.

The 78759 zip code zone is home to Austin's largest high technology employers. It is also the zone with the greatest concentration of software development firms with 59 software developers (16.4%) listed in the Austin Software Developers Directory located in this zone.

**The Heart of Austin's Technology Development  
The 78759 Zip Code Zone**



Type of Firm	Number of Firms	% of Total	Cumulative %
Startup	123	72.35%	72.35%
Relocation	15	8.82%	81.18%
Spin-Off	7	4.12%	85.29%
Diversification/Expansion	16	9.41%	94.71%
Other	9	5.29%	100.00%
<b>Total</b>	170	100.00%	

Based on a sample of 170 software development firms, the majority of firms surveyed are start-ups (72.35%), followed by diversifications/expansions (9.41%), relocations (8.82%), other (5.29%) and spin-offs (4.12%).

Over 87% of the software firms surveyed have 100 or less employees and more than 50% of the firms are composed of 5 or less employees. 54% of 1-5 employee firms have 4 to 5 employees.

Size Firm	No of Firms	Percent of sample	Cumulative Percent
<b>1-5 Employees</b>	41	51.25%	51.25%
<b>6-10 Employees</b>	12	15.00%	66.25%
<b>11-100 Employees</b>	17	21.25%	87.50%
<b>100+ Employees</b>	10	12.50%	100%

n=80

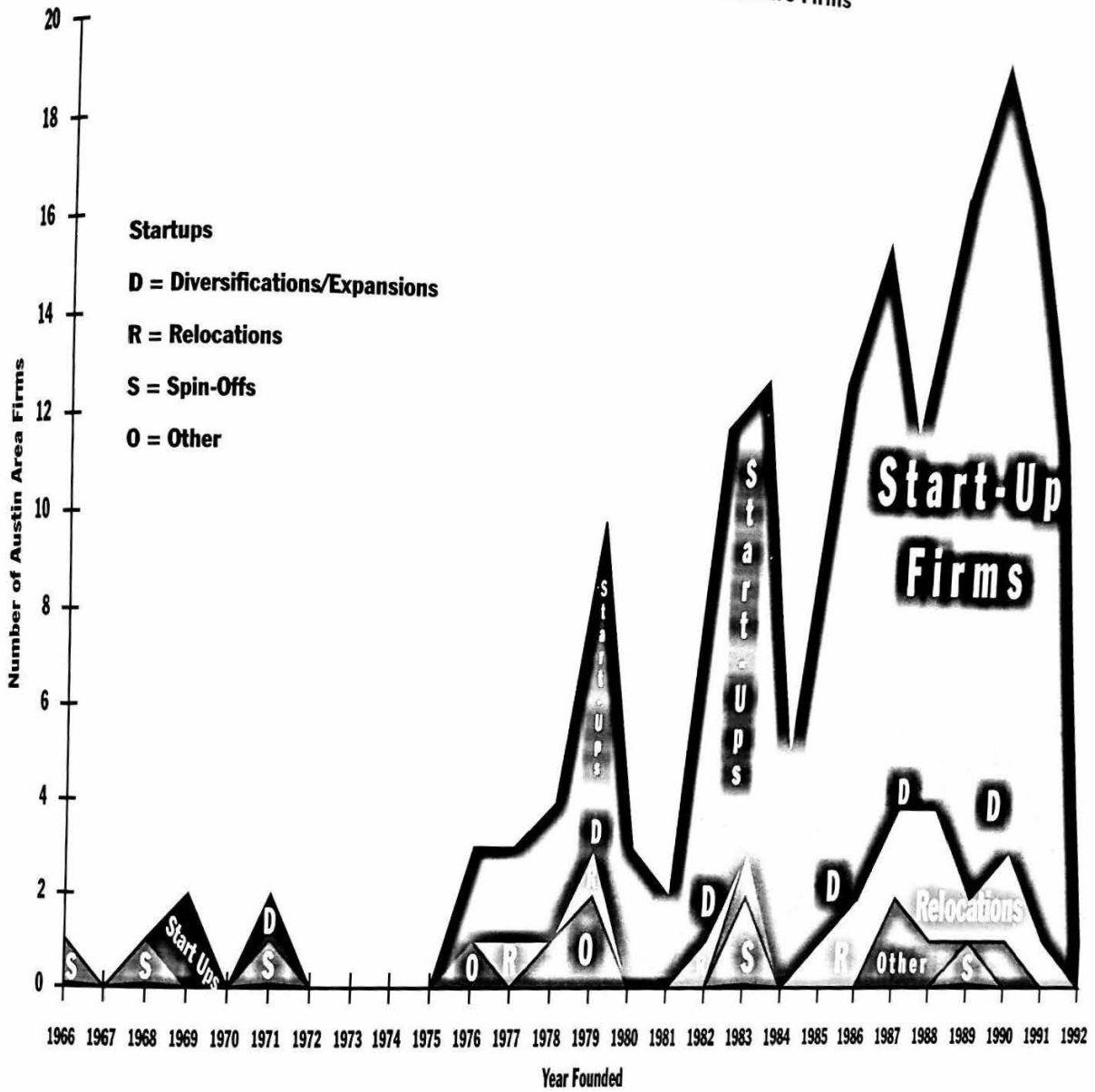
Year Founded	No of Firms	Percent of Total	Cumulative Percent
1966-1970	4	2.3%	2.3%
1971-75	3	1.7%	4.0%
<b>1976-1980</b>	<b>22</b>	<b>12.7%</b>	16.7%
<b>1981-1985</b>	<b>46</b>	<b>26.6%</b>	43.3%
<b>1986-1990</b>	<b>85</b>	<b>49.1%</b>	92.4%
*1991	13	7.6%	100%

\*as of October 1991

n=173

Foundings of Austin's software development firms (based on a sample of 173 firms) has been steadily increasing since 1966.

**Yearly Foundings By Firm's Origin  
1966-1991  
Based on Sample of 170 Austin Area Software Firms**



As the above chart illustrates, the emergence of Austin as a major center for software development began to build steadily starting in 1975 with the number of software startups and a steady increase in diversifications/expansion, relocations and spin-offs continuing to present day.

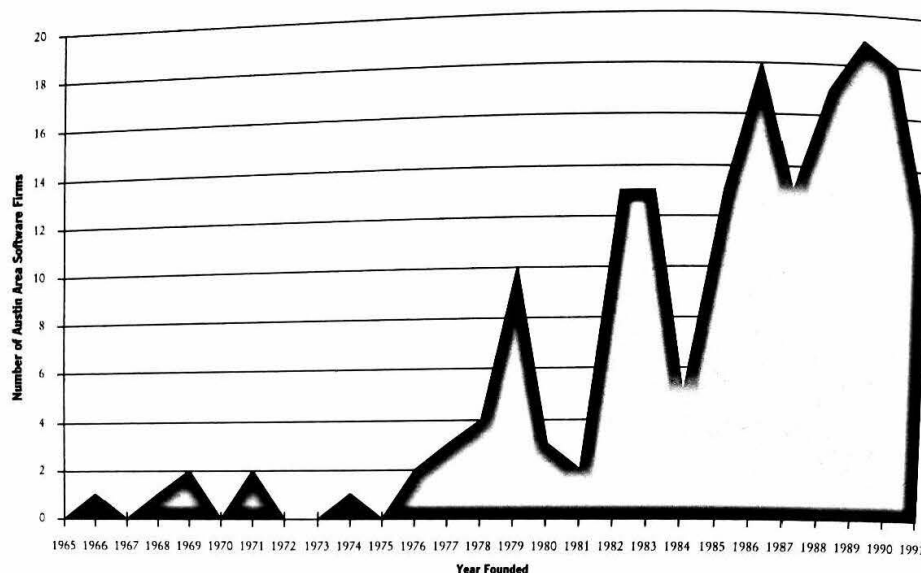
Based on the sample of 170 firms, from 1980 to 1989, 86 of the start-up firms were founded. From 1980 to 1991, 14 diversifications/expansion firms relocated

to Austin. The majority of expansions, 11 firms came to Austin between 1985 to 1991. From 1985 to 1991, 12 firms relocated to Austin.

During 1990 and 1991, 10 Start-Ups; 4 Expansions/ Diversifications; and 3 firms have relocated to the Austin Area.

## Annual Growth of Austin's Software Firms 1965-1991

Based on Sample of 173



An overview of software firms relocations, expansions and founding in the Austin area reveals that the majority occurred in the 1980s. Of the 173 firms, 147 (85%) were founded in the 1980s, 111 firms (64%) were founded since 1985.

### A u s t i n   A r e a   S o f t w a r e   F i r m s   E m p l o y m e n t

Size Firm	No of Firms	Total Austin Based Employees	Full Time Software Professionals	Contract Software Professionals	Total Software Professionals
1-5 Employees	41	135	61	30	91
6-10 Employees	12	93	45	12	57
11-100 Employees	17	623	372	28	400
100+ Employees	10	25969*	1640	490	2130

*Based on 80 Austin area software development firms*

*\*number based on survey data plus additional sources*

The sample of 41/1-5 employee software firms employ 135 employees in the Austin area, of which 61 are full time software professionals and 30 are contract software professionals.

The sample of 12 firms with 6-10 employees employ 93 employees. 45 are full time software professionals and 12 are contract software professionals.

The sample of 17 Austin area software firms with 11-100 employees 623 employees. There are 372 full time software professionals and 28 contract software professionals.

Firms with 100+ employees employ 25,969 employees (this number is based on survey data plus additional employment figures provided by The Austin American Statesman and the companies themselves). 1640 are full-time software professionals and 490 are contract software professionals.



The majority of the programmers employed have more than 10 years programming experience. The exception to this is in the 6-10 employee sized firms in which the majority of programmers in this category (49%) have 2-5 years programming work experience in contrast to the 31.58% with more than 10 years. In 100+ firms, 30.70% of programmers have 6-10 years experience and 29.29% have more than 10 years experience.

Size Firm	<2 Years	2-5 Years	6-10 Years	>10 Years
<b>1-5 Employees</b>	5	18	19	35
<b>6-10 Employees</b>	5	28	8	18
<b>11-100 Employees</b>	27	99	91	125
<b>100+ Employees</b>	187	259	654	624
<b>Total</b>	224	404	772	802

Size Firm	1993	1994	1995
<b>1-5 Employees</b>	57	35	29
<b>6-10 Employees</b>	35	34	35
<b>11-100 Employees</b>	108	167	191
<b>100+ Employees</b>	2466	2401	2142

The largest expansion in employment (42.28%) is anticipated by the 1-5 employee software development firms.

Firms with 6-10 employees also expect over 36% annual employment expansion between 1993 and 1995.

11-100 employee firms expect employment growth to be slower in 1993 (17.35%), 1994 (26.76%), and in 1995 (30.70%).

100+ employee firms predict 20% employment growth for 1993-1995. However, in terms of actual number of employees hired, it is the largest firms that will provide the greatest employment opportunities.

The greatest percentage sales growth (65.99%) is anticipated in 1993 by 1-5 employee firms which corresponds to expected employment growth.

In 1994, 46.47% sales growth is anticipated by 11-100 employee firms.

In 1995, the greatest growth (45.95%) is anticipated by 1-5 employee firms.

All but the 100+ firms expect 40% or greater growth in all three years. However, the 100+ firms expect annual growth of approximately 30% for the next three years.

Once again, in terms of actual sales growth, it is the largest firms that have the greatest overall impact on the Austin economy.

Size Firm	1993	1994	1995
<b>1-5 Employees</b>	65.99%	44.27%	45.95%
<b>6-10 Employees</b>	40.42%	39.58%	44.17%
<b>11-100 Employees</b>	38.24%	46.47%	41.76%
<b>100+ Employees</b>	28.70%	29.50%	32.00%

*The challenge of technological innovation in the new globally competitive era can be stated as follows: How can each organization, region, and nation, individually and in concert with others, manage technology creatively and innovatively to reap the benefits of sustained economic growth? Those organizations and regions most able to accomplish this objective will play key roles in resolving the paradox of global competition and cooperation.*

*George Kozmetsky, Director  
IC<sup>2</sup> Institute*

Technology commercialization in the coming decades will be realized by meeting the challenges presented by a hypercompetitive global marketplace in the post cold war era. To prepare for the twenty-first century, the nation and its communities as well as federal agencies and corporations will have to implement innovative technology transfer strategies in order to remain globally competitive and to maintain an affordable high quality of life, to maintain a high standard of living, to create high value jobs, and to address the considerable economic challenges facing the United States.

America's strength has always been grounded in the nation's ability to be scientifically creative, technologically adept, managerially innovative, and entrepreneurially daring. An important factor in fostering and sustaining regionally-based technology growth is a coordinated effort by public and private sector entities to foster technology-based development. Austin has positioned itself to meet these challenges.<sup>1</sup>

Austin is one of the country's "hot regions" for new economic growth based on high technology and emerging technologies. According to U.S. Census Bureau figures, Austin was the 8th fastest growing metro area in the United States over the past decade. The boom has been attributed to the alliance among state and local government, businesses and The University of Texas. According to *Fortune*, almost two thirds of Austin's output is high tech related. Austin's jobless rate is 4.5% - approximately 55,000 jobs are provided by Austin's 450 technology based companies.<sup>2</sup> Area software recruiters rank it in the top 95th percentile in the nation for UNIX development capability.<sup>3</sup>

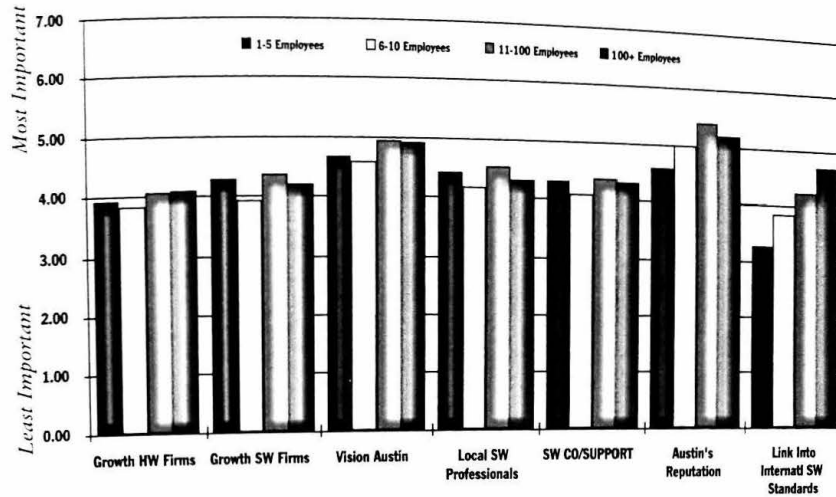
In addition, Austin is home to two of the largest entrepreneurial computer companies Dell and CompuAdd as well as several major companies alliances such as: the Apple-IBM-Motorola alliance, and IBM's Entry System Division which makes IBM clone for other companies.

<sup>1</sup> Kozmetsky, George; Gibson, David V; and Kilcrease, Laura. *NASA (Field Center Based) Technology Commercialization Centers*. IC<sup>2</sup> Institute, The University of Texas - Austin, 1993.  
<sup>2</sup> *Fortune Magazine*, November 2, 1992  
<sup>3</sup> McDow, Tony. "UNIX, Open Systems and the Austin Technopolis: Preliminary Study of the Austin UNIX-based Software Industry".



# AUSTIN'S SOFTWARE INDUSTRY INFRASTRUCTURE

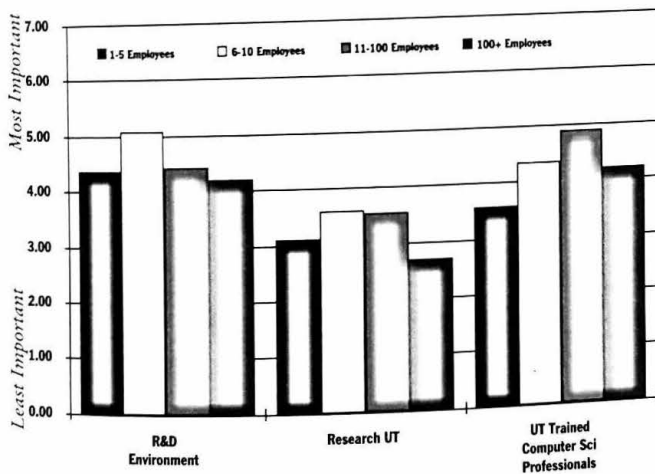
*A stable work force of people willing to work hard, is one of the advantages we have versus Silicon Valley. Our work force is much more stable, where they run up and down in the Valley out there, with a drop of the hat almost. It just took us a little longer than Silicon Valley to start getting the spin-offs. Texas Instruments*



## TECHNOLOGY

When asked to rate the importance of Austin's software industry infrastructure factors to their company's growth, the clear vision of Austin's emergence as a national/international software development center and Austin's national/international reputation for producing high quality, reliable and secure software were rated as most important to business' growth by all groups.

Also rated as important by all groups was a pro-active and networked group of local software professionals and the leveraging and networking of local software companies and support services. The rapid growth of Austin's hardware and software firms was also considered important. The importance of linking to international software standards increased with the size of the firm.

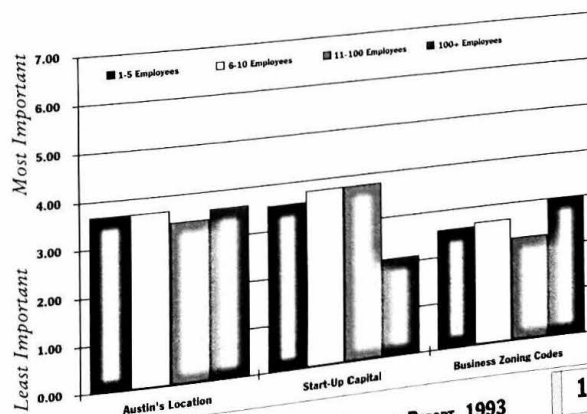


## RESEARCH & EDUCATION

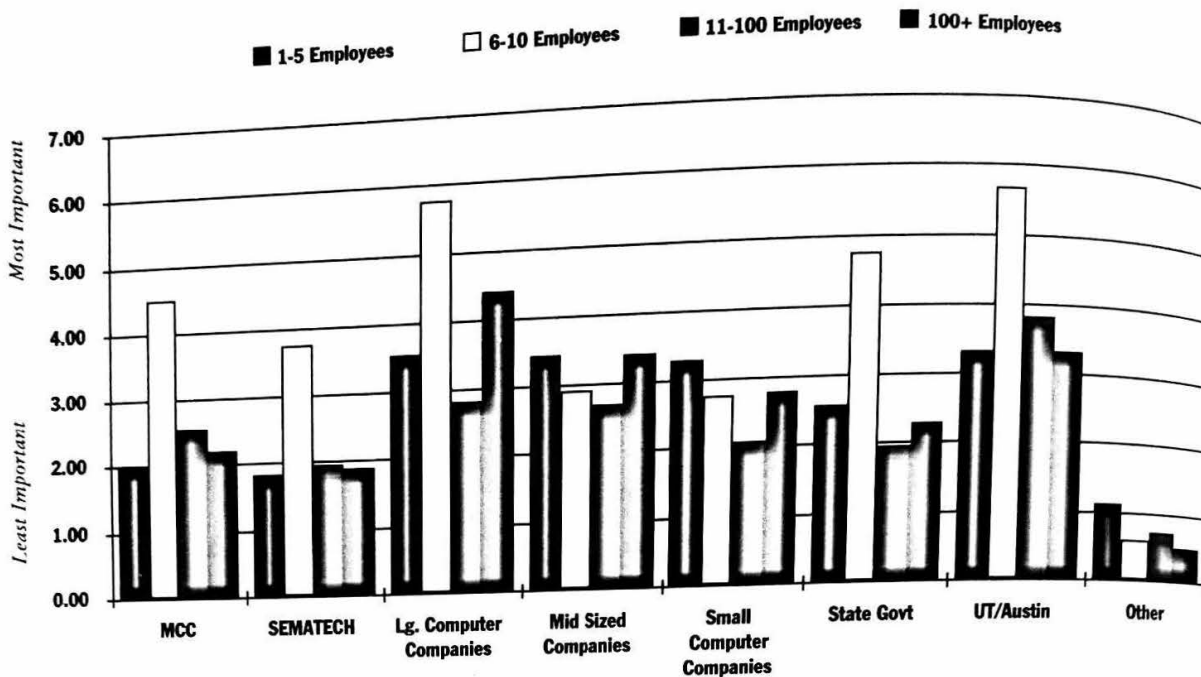
All groups rated a productive locally-based R&D environment as important to their firm's growth. All except the 1-5 firms rated the quality of education for computer science professionals at UT as important to their firm's growth.

## BUSINESS

Austin's central location, the availability of start-up capital and improved local business zoning codes received the lowest rating by all groups as being important to their firm's growth.



# IMPORTANCE OF AUSTIN'S INSTITUTIONS/ORGANIZATIONS TO THE GROWTH OF AUSTIN'S SOFTWARE DEVELOPMENT FIRMS



*“SEMATECH has proven to be an important investment for the industry and the nation. It has helped improve semiconductor manufacturing technology...and improved communications between users and suppliers.*

*MCC is developing an information infrastructure, which will enable businesses to develop, manufacture, deliver and support products and services with superior speed, flexibility and quality”*

### President Clinton's Technology Policy Report

In terms of their firm's growth, software developers were asked to rank the importance of existing large, mid-sized, and small computer companies, state government, UT-Austin, and the highly visible organizations - SEMATECH and MCC.

None of the categories received a rating of 6 or 7 (most important). UT/Austin was the only category to receive a rating greater than 3 by all four groups.

1-5 employee firms rate large, mid sized computer companies, small computer companies, and UT/Austin as being most important to the growth of their company.

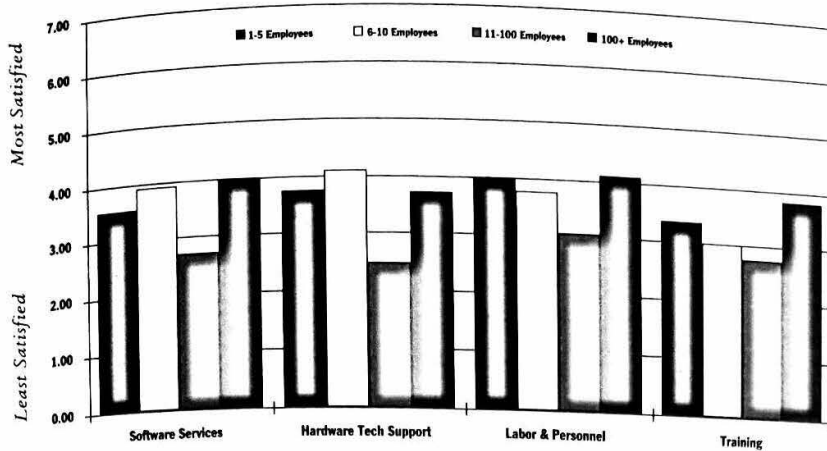
6-10 employee firms report the most dependence on Austin's institutions and organizations. These firms gave the most favorable ratings to large computer companies, UT/Austin, state government and MCC .

11-100 firms considered UT-Austin and large and mid-sized computer companies as being most important to their firm's growth

100+ employee firms are the least dependent on Austin's institutions and organizations, however they did rate UT/Austin as most important to the growth of their organizations.

When asked what their top sources were for recruiting software, sales and marketing professionals, UT/Austin was mentioned as a strong source of recruitment by all sized firms.

# BUSINESS PROFESSIONAL RESOURCES



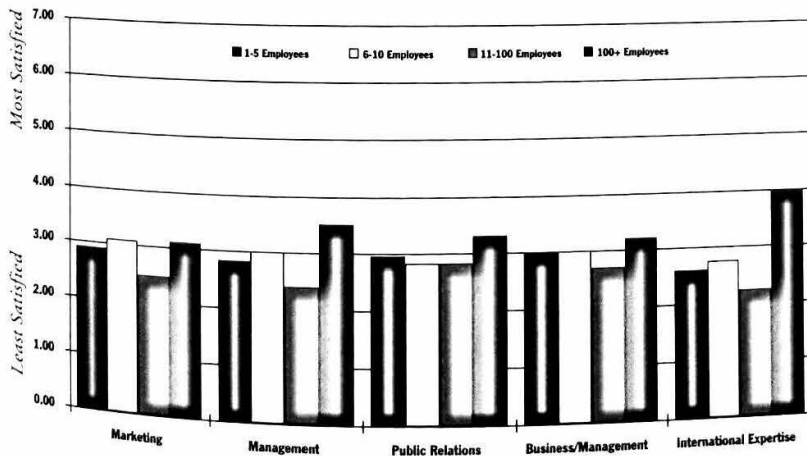
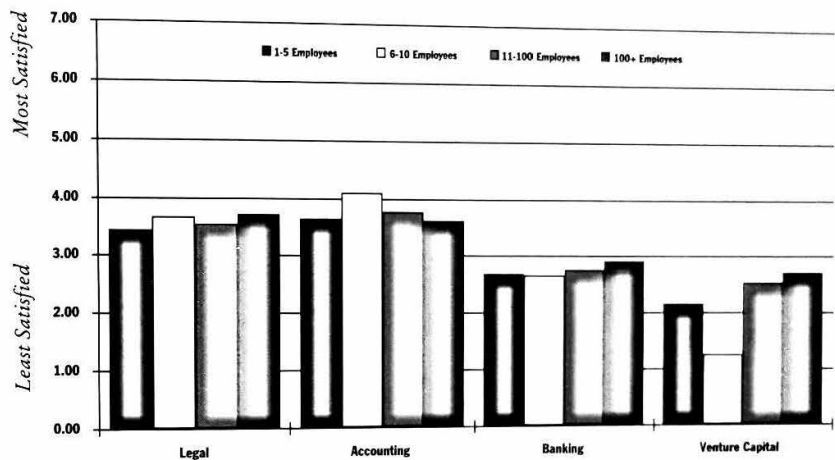
## SUPPORT SERVICES

Respondents were asked to rate their satisfaction with specific support services as they related to their company's growth.

While none of Austin's support services received unanimous praise, Austin's labor and personnel, hardware technical support and software services received favorable satisfaction scores by all but the 11-100 group.

## PROFESSIONAL SERVICES

Austin's legal and accounting services were rated as most satisfactory by all groups. As expected, venture capital received the lowest ratings followed by low satisfaction ratings for Austin's banking services which corresponds to results from start-up financing.



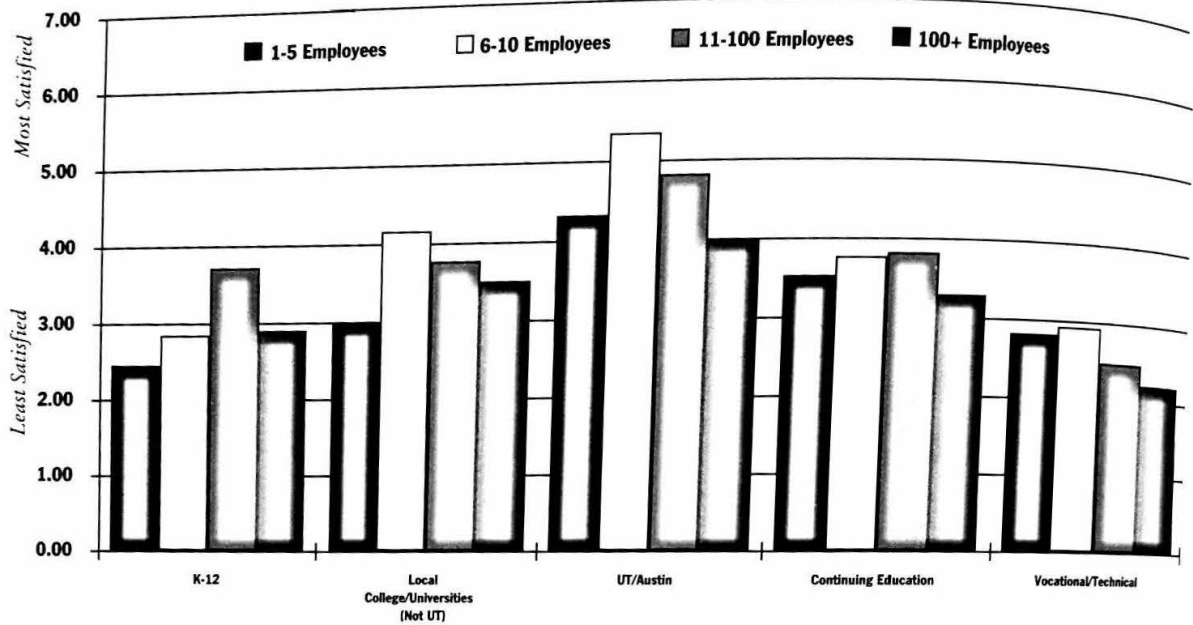
## BUSINESS SERVICES

Austin's software developers are least satisfied with the area's marketing, management, public relations, business and international expertise. 100+ firms rating international expertise as satisfactory is attributed to their in-house expertise.

## EDUCATIONAL INFRASTRUCTURE

*"The university is a massive asset. If you look at the people in the company, the people right out of school are sort of an infrastructure of critical mass for companies."*

*Michael Dell*



Respondents were asked to rate their satisfaction with Austin's educational infrastructure as it related to their company's growth. K-12 and local vocational/technical received the lowest satisfaction scores.

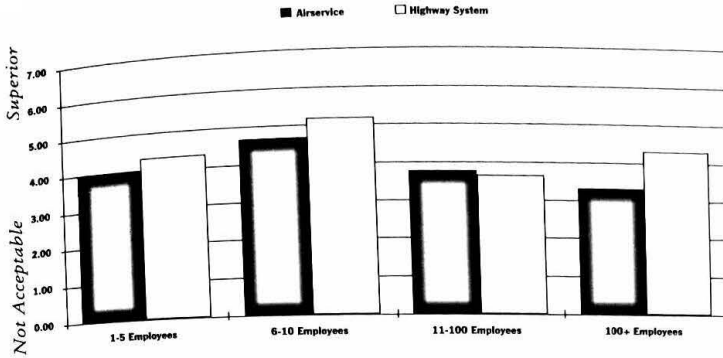
The category to receive the highest rating of satisfaction was The University of Texas at Austin. On the other hand, the majority of respondents expressed dissatisfaction with the university's lack of accessible courses for the area's business professionals.

When asked what they would change about Austin, every group mentioned the availability of continuing education at UT. Strongly emphasized was the need for an evening school division at UT. "Current practices make it nearly impossible to teach/attend".

## COMMUNITY INFRASTRUCTURE

*Austin does have a unique atmosphere, slower in day-to-day pace than other high-tech centers, but increasingly savvy, open to change and capable of responding rapidly to challenges.*

*Washington Post 1992*



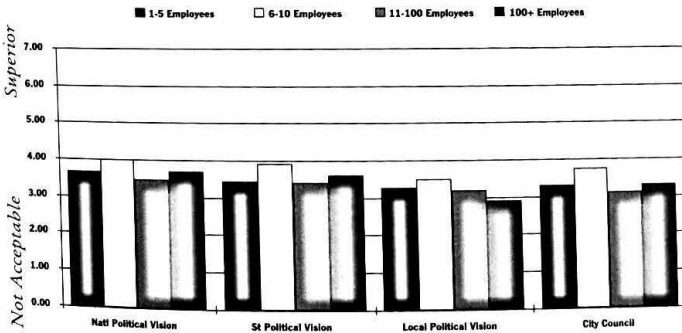
## COMMUNITY TRANSPORTATION

In general, respondents for Austin's software development firms gave an average rating to the area's air service and highway system.

## QUALITY OF LIFE IN AUSTIN

*This section received the most favorable ratings of all the categories. All of the categories in this section received a rating of acceptable or better.*

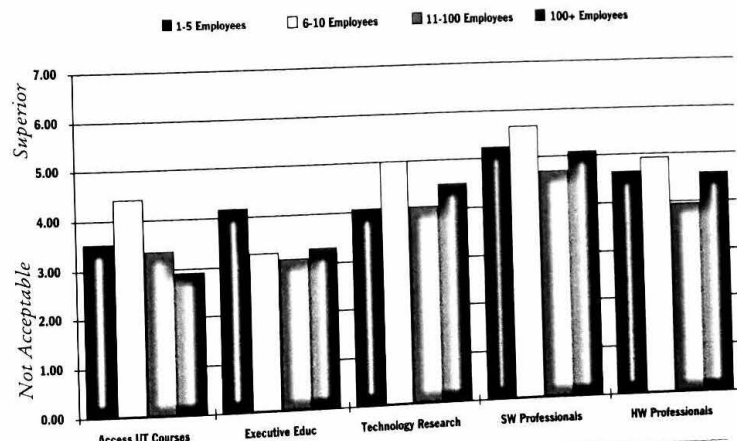
Austin's quality of life received the highest ratings by respondents as did the availability of a quality work force, reasonable cost of living and the cost of doing business in Austin.



## POLITICAL VISION

Political vision and support at the national, state and local level received a modest score as did the business attitude of the city council.

Access to quality software professionals received acceptable ratings from respondents and access to hardware professionals and technology research. However, access to the University of Texas course offerings received ratings of unacceptable by all groups except the 6-10 group. Executive Education offerings were also rated as unacceptable by all but 1-5 firms.



*According to the U.S. Census Bureau's 1987 survey of business owners, more than half of all small businesses are started with less than \$5,000.00.*

### Sources of Startup Financing

<b>Local Financing Sources</b>					<b>National Financing Sources</b>				
	<b>1-5</b>	<b>6-10</b>	<b>11-100</b>	<b>100+</b>		<b>1-5</b>	<b>6-10</b>	<b>11-100</b>	<b>100+</b>
<i>Personal Savings/Income</i>	66.03%	27.14%	16.15%	-	<i>Government Contracts</i>	-	12.86%	5.38%	20.00%
<i>Consultation Fees</i>	9.31%	10.00%	12.69%	-	<i>Banks</i>	-	-	6.15%	2.5%
<i>Friends</i>	2.07%	15.71%	7.69%	-	<i>Parent Firm</i>	-	-	-	50.00%
<i>Borrowings Personal/Family Property</i>	6.72%	-	4.23%	-	<i>Venture Capital</i>	-	-	-	9.23%
<i>Parent Firm</i>	-	-	4.62%	-	<i>Consultation Fees</i>	-	7.86%	-	-
<i>Banks</i>	-	-	10.15%	-					
<i>Venture Capital</i>	-	-	7.69%	-					

While sources of start-up financing varied widely for Austin's software development firms there was a definite pattern to the type of financing based on the size of the firm. All but 100+ firms had some type of local start-up financing. The majority of financing came from personal savings/income 66.03% in 1-5 firms, 27.14% in 6-10 firms and 16.15% in 11-100 firms.

For 6-10 firms, the second most common source of start-up financing came from friends (15.71%). 11-100 and 1-5 firms relied on consultation fees to provide sources of financing. Additionally, 11-100 firms were the only group to list banks and venture capital as a source of local financing with 10.15% of their funding coming from local banks and 7.69% from venture capital.

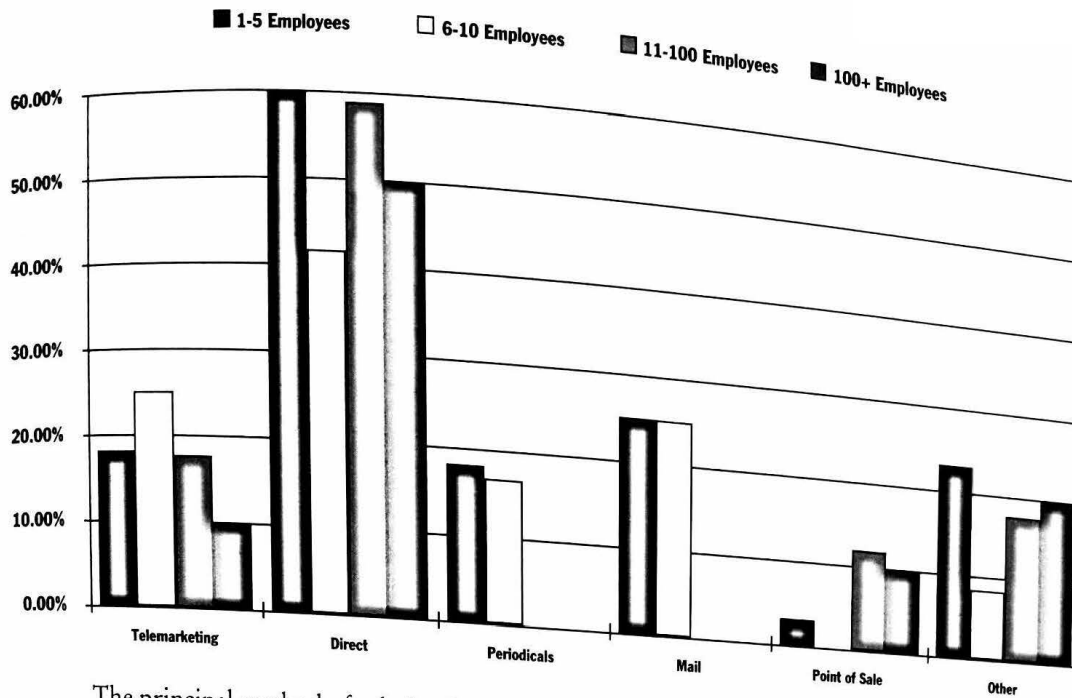
100+ firms had no source of local financing, 1-5 firms had no national source of start-up financing, 100+ firms

had the most sources of national financing, with 50.00% of their financing coming from parent firms. Government contracts were also listed as a significant sources of financing: 20.00% for 100+ firms, 12.86% for 6-10, and 5.38% for 11-100 firms.

When respondents were asked to specify the one thing they would change about Austin's business climate to facilitate their business' growth, all groups of firms mentioned financing and access to capital particularly - the willingness of Austin's banking institutions to lend capital.

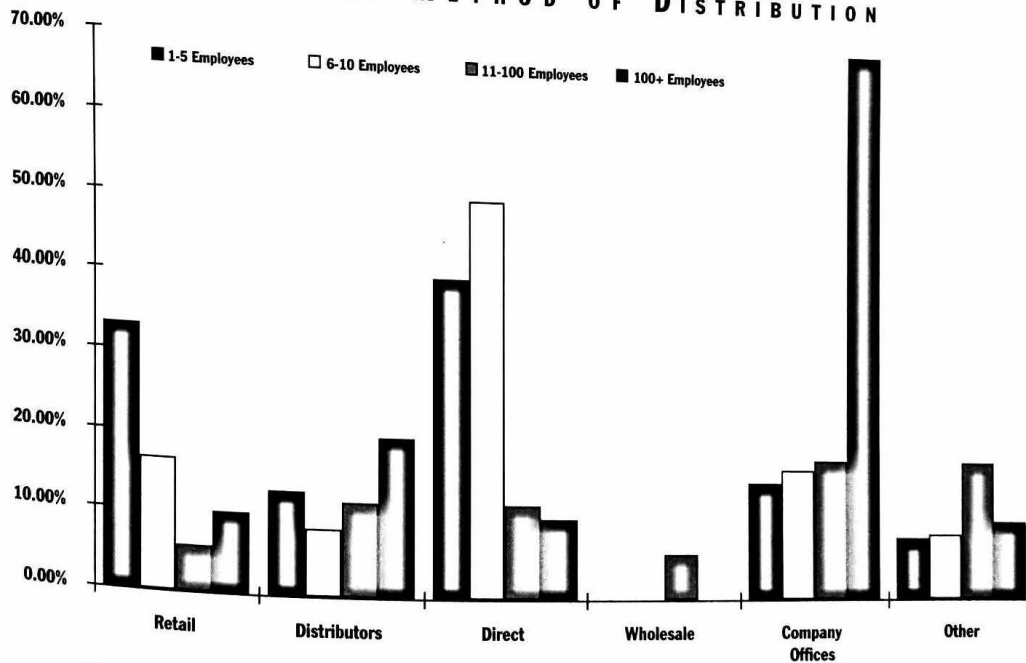
When respondents were asked what services/products they considered most important to their company's growth and which were not readily available in Austin, all groups mentioned banks willingness to lend to businesses. All but the 100+ groups also mentioned venture capital and investment capital as services which were not sufficiently available in the Austin area.

## PRINCIPAL METHOD OF SALE



The principal method of sale for Austin's software developers is direct sales. Telemarketing and periodicals are also a preferred method of sale for Austin's smaller software developers. In addition to direct sales, 1-5 employee firms also use mail (24%) and other methods (24%) to distribute their software.

## PRINCIPAL METHOD OF DISTRIBUTION



For Austin's 1-5 and 6-10 employee software developers, the primary methods of distribution are direct mail (39%) and (50%) followed by retail (32%) and (17%). 11-100 firms primary methods of distribution are distributors (11.76), direct (11.76%) and company offices (17.65%). The primary method of distribution for 100+ employee firms is company offices (70.00%).

## SOFTWARE DISTRIBUTION TERRITORY

DISTRIBUTION TERRITORY	1-5 Employees	6-10 Employees	11-100 Employees	100+ Employees
<b>Austin</b>	<b>70.00%</b>	<b>66.67%</b>	<b>70.59%</b>	<b>70.00%</b>
<b>Other Texas</b>	<b>70.00%</b>	<b>66.67%</b>	<b>64.71%</b>	<b>70.00%</b>
<b>Other USA</b>	<b>68.29%</b>	<b>66.67%</b>	<b>88.24%</b>	<b>60.00%</b>
<b>Canada</b>	<b>29.27%</b>	<b>41.67%</b>	<b>52.94%</b>	<b>60.00%</b>
<b>Far East</b>	<b>9.76%</b>	<b>16.67%</b>	<b>47.06%</b>	<b>50.00%</b>
<b>Middle East</b>	<b>14.63%</b>	0.00%	<b>41.18%</b>	<b>50.00%</b>
<b>South America</b>	<b>14.63%</b>	<b>16.67%</b>	<b>41.18%</b>	<b>50.00%</b>
<b>Central America</b>	<b>12.20%</b>	8.33%	17.96%	20.00%
<b>Mexico</b>	<b>17.07%</b>	<b>16.67%</b>	<b>35.29%</b>	<b>40.00%</b>
<b>Africa</b>	4.88%	0.00%	11.76%	20.00%
<b>Australia</b>	<b>19.51%</b>	<b>25.00%</b>	<b>43.75%</b>	<b>30.00%</b>
<i>New Zealand</i>	<b>9.76%</b>	8.33%	<b>25.00%</b>	10.00%
<i>Pacific Rim</i>	<b>9.76%</b>	<b>16.67%</b>	<b>37.50%</b>	<b>50.00%</b>
<i>England</i>	<b>9.75%</b>	8.30%	<b>31.25%</b>	<b>50.00%</b>
<i>Germany</i>	<b>9.75%</b>	8.30%	<b>25.00%</b>	<b>50.00%</b>
<i>France</i>	7.31%	0.00%	18.75%	<b>30.00%</b>
<i>Italy</i>	2.40%	0.00%	6.25%	0.00%
<i>Switzerland</i>	2.40%	0.00%	0.00%	20.00%
<i>Scandinavia</i>	4.87%	0.00%	6.25%	10.00%
<i>Belgium</i>	2.40%	0.00%	6.25%	10.00%
<i>Poland</i>	0.00%	0.00%	6.25%	0.00%
<i>Hungary</i>	0.00%	0.00%	6.25%	0.00%
<i>Austria</i>	0.00%	0.00%	6.25%	0.00%
<i>Netherlands</i>	2.44%	0.00%	0.00%	20.00%

n=80 \*italics represent written in responses

The majority of Austin's software development firms distribute their product in the United States. From 60% (100+ firms) to 88.24% (11-100 firms) of Austin's firms distribute in the United States. 65-70% of all software is distributed in Austin and/or Texas.

In addition to national sales locations, respondents were asked to specify their world-wide sales locations. In the table above, areas in italics represent written-in responses. A large portion of the 100+ firms and 11-100 firms distribute to foreign countries. Surprisingly, a significant number of the smaller firms, while not as large a percentage as the larger firms, also distribute world-wide.

All groups distribute to the following foreign locations: Canada, South America, Mexico, the Far East, Australia and the Pacific Rim.

60% of 100+ firms distribute to Canada, 50% to the Far East, Middle East, Pacific Rim, England and Germany. 40% distribute to Mexico and 30% distribute to Australia and France.

52.94% of 11-100 firms distribute to Canada, 47.06% to the Far East, 43.75% to Australia, 41.18% to the Middle East and South America, 37.50% to the Pacific Rim and 35.29% to Mexico.

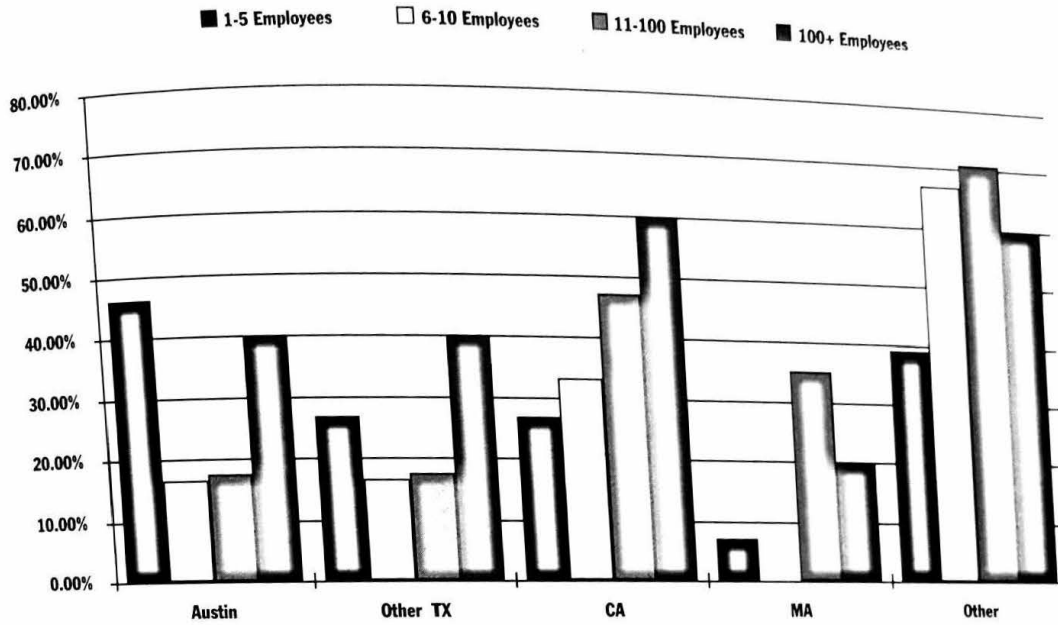
41.67% of 6-10 firms distribute to Canada, 25% to Australia, and 16.67% to the Far East, Mexico, and the Pacific Rim.

29.27% of 1-5 firms distribute to Canada, 19.51% to Australia, 17.07% to Mexico, 14.63% to the Middle East and South America, 12.20% to Central America and 9.76% to New Zealand, the Pacific Rim, England, and Germany.



# LOCATION OF SIGNIFICANT COMPETITION

## National Competition



Austin's smallest software developers (1-5 employee firms) face the most significant competition from the Austin area, while 6-10, 11-100, and 100+ firms face the most competition from California. Other Texas cities were also seen as the location of significant competition for Austin's software developers. Boston, MA was considered an area of significant competition for Austin's largest firms.

Respondents were asked to write in additional areas from which they faced significant national competition. The response varied widely by group, however, all groups consider New York as an area of significant competition. All but 6-10 firms listed Colorado as an area of significant competition. Alabama and Atlanta were listed by 6-10 and 11-100 firms, Washington, DC was listed by 1-5 and 11-100 firms and North Carolina was listed by 11-100 and 100+ firms as an area of significant national competition.

## International Competition

Respondents were also asked to indicate where their most significant international competition was located. 100+ firms listed 4 areas as providing the most significant international competition: the Pacific Rim, Middle East, Indian Subcontinent, and Far East each receiving a 10% response rate. Canada (12.5%) was listed as the location of international competition for 11-100 firms. 6-10 firms listed Europe with a 6.67% response rate. 1-5 firms listed 3 areas as significant locations of international competition: New Zealand (8.33%), Canada (5.0%) and the Far East (2.5%).

PERCENT REVENUE FROM SERVICES/PRODUCTS	1-5 Employees		6-10 Employees		11-100 Employees		100+ Employees	
	Current	1995	Current	1995	Current	1995	Current	1995
<b>Prepackaged Software Applications</b>	<b>32.10%</b>	<b>41.59%</b>	<b>23.83%</b>	<b>30.83%</b>	<b>41.76%</b>	<b>27.65%</b>	<b>22.60%</b>	<b>16.60%</b>
<b>Custom Software Applications</b>	<b>24.05%</b>	<b>21.10%</b>	<b>39.58%</b>	<b>32.92%</b>	<b>33.24%</b>	<b>17.65%</b>	<b>13.80%</b>	<b>10.00%</b>
<b>Retail/Marketing</b>	0.73%	1.83%	5.00%	6.25%	7.06%	7.65%	0.00%	0.00%
<b>Software Integration Services</b>	2.07%	2.20%	4.25%	5.00%	<b>15.88%</b>	<b>12.94%</b>	8.00%	7.50%
<b>Subcontract Programming Services</b>	2.71%	3.24%	5.00%	2.92%	7.94%	6.18%	<b>14.00%</b>	<b>10.00%</b>
<b>Consultation Services</b>	<b>14.85%</b>	<b>10.73%</b>	8.83%	8.33%	<b>7.12%</b>	<b>11.76%</b>	2.00%	2.00%
<b>Training/Education Services</b>	6.22%	5.02%	1.75%	3.33%	<b>4.47%</b>	<b>8.53%</b>	1.50%	3.50%
<b>Data Processing Services</b>	2.78%	4.27%	5.50%	6.25%	2.35%	0.06%	2.70%	4.50%
<b>Reselling</b>	6.76%	6.20%	6.67%	7.08%	2.65%	3.24%	4.10%	3.60%
<b>Outside R&amp;D Services</b>	3.90%	1.71%	0.00%	0.00%	11.41%	9.41%	8.50%	6.50%
<b>Other</b>	10.61%	10.73%	9.17%	9.58%	0.88%	1.18%	10.00%	9.00%

n=80

Respondents were asked to indicate the percentage of their present and estimated future (1995) revenue from software services/products. Revenue from prepackaged and custom software applications account for the majority of revenue generated for all sized firms. Revenue from prepackaged software is predicted to increase for 1-5 firms (10%) and 6-10 firms (7%), but decrease for 11-100 firms by 13% and 100+ firms by 6%. Percent revenue from custom software applications is predicted to decrease by 3% for 1-5 firms, 8% for 6-10 firms, 16% for 11-100 firms and 4% for 100+ firms. Other services/products areas were either constant or have modest increases or decrease from 1992 to 1995 in terms of revenue generation.

*As a result of the high demand for smaller more powerful computers, the Computer and Business Equipment Manufacturers Association (CBEMA) predicts that software will remain the high-margin growth area, with two digit sales increase through 1996.*

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In these recessionary times, businesses have been hesitant and reluctant to spend on new equipment - except on computers. Dataquest estimated worldwide computer sales of all kinds totaled \$104.5 billion in 1992.<sup>1</sup>

The Stanford C. Bernsetein brokerage firm estimate that by 1996 the number of PCs in American homes will grow by over 25% to 15 million. PCs have become a commodity. While the cost of computers continues to decline, not all consumers are pocketing the savings; many are buying bigger, better and more expensive machines. Dell Computer reported that revenue per order was up 10% after the company reduced its PC prices in June 1992.

Domestic computer shipments are expected to jump 14.5% in 1993, vs 8.3% in 1992. However dollar sales will rise only 8% on top of 0.9% in 1992. U.S. sales of portables are predicted to increase over 50% in 1993. Workstation sales are expected to increase 1,000% by 1996. Mainframes sales accounted for 21.6 percent of computer sales in 1992, compared to 24.9 percent in 1991. The Computer and Business Equipment Manufacturers Association (CBEMA) estimates sales growth of mainframes and minis will creep along at 2% a year for the next decade.

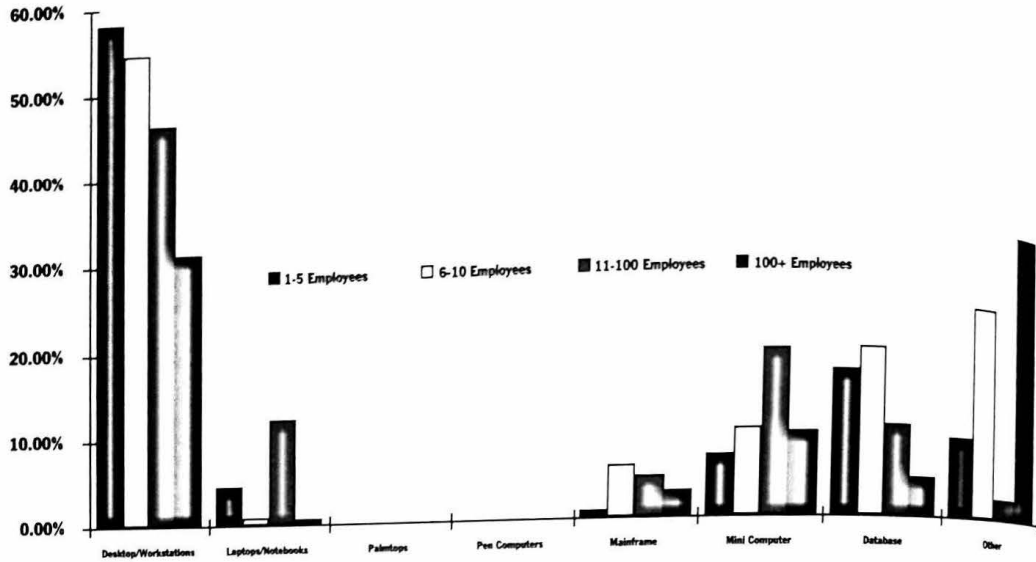
Buyers are shifting to less expensive desktop workstations. "It is expected that the shift in buyer preference away from mainframes will continue to erode the mainframe's share of the total worldwide computer systems market" according to Dataquest.<sup>2</sup> The outlook for midrange systems - those costing \$5000,000 to \$1 million, such as IBM's AS/400 and DEC's VAX series - isn't much better. IDC expects sales to increase only 2%. The trend appears to be towards the cheaper more powerful PCs and away from large expensive systems.

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<sup>1</sup>Dataquest, 1992

<sup>2</sup>Ibid

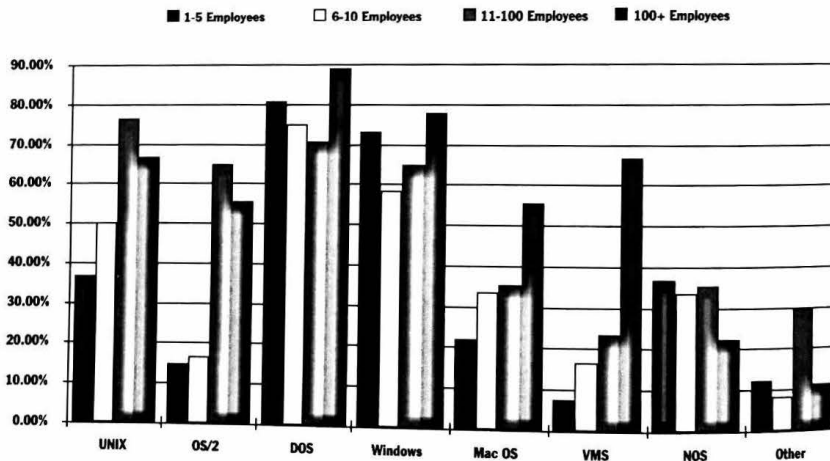
## PERCENTAGE COMPANY'S CURRENT REVENUE BY PLATFORM



Desktop/Workstations have the most developer support by all groups. This platform is expected to continue to be the platform of choice into 1995.

Following the national trend, mainframes are predicted to continue to decrease as revenue generators, except for 11-100 employee sized firms.

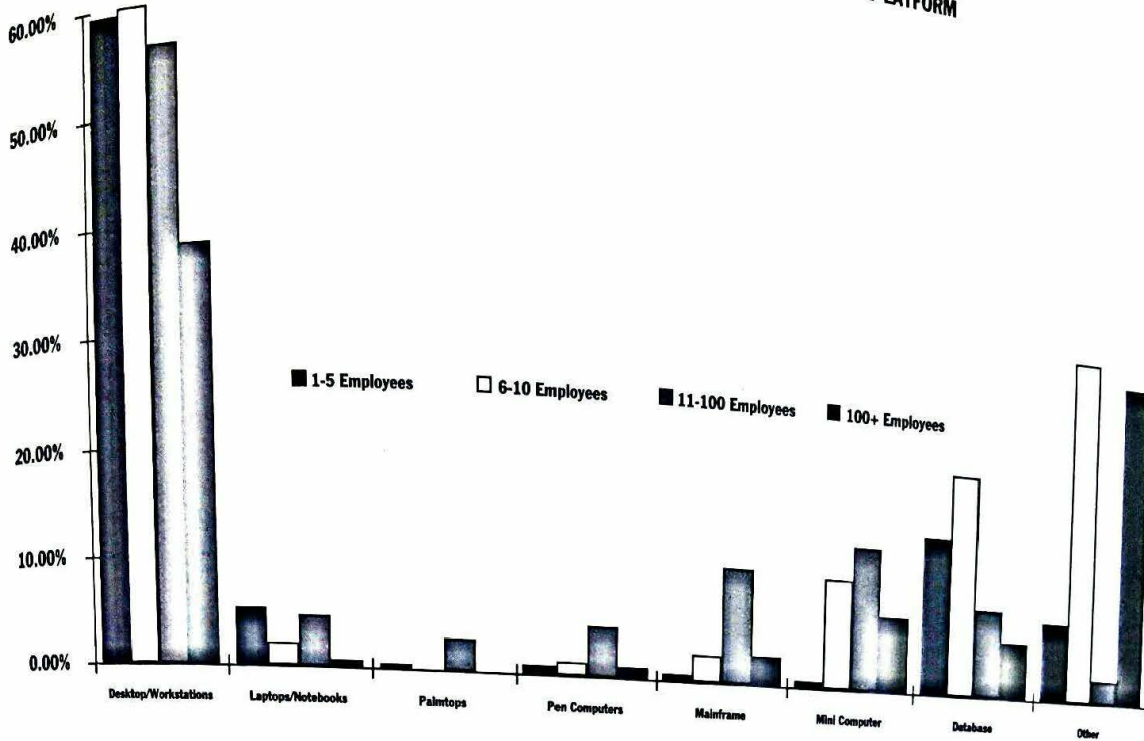
## OPERATING SYSTEM CURRENTLY USING



As of 1992, DOS was the predominate operating system for all but the 11-100 group where UNIX was the predominate operating system.

By 1995 all but the 100+ firms expect to be using DOS less and UNIX more. Use of Windows and the Mac OS were predicted to increase for all sized firms.

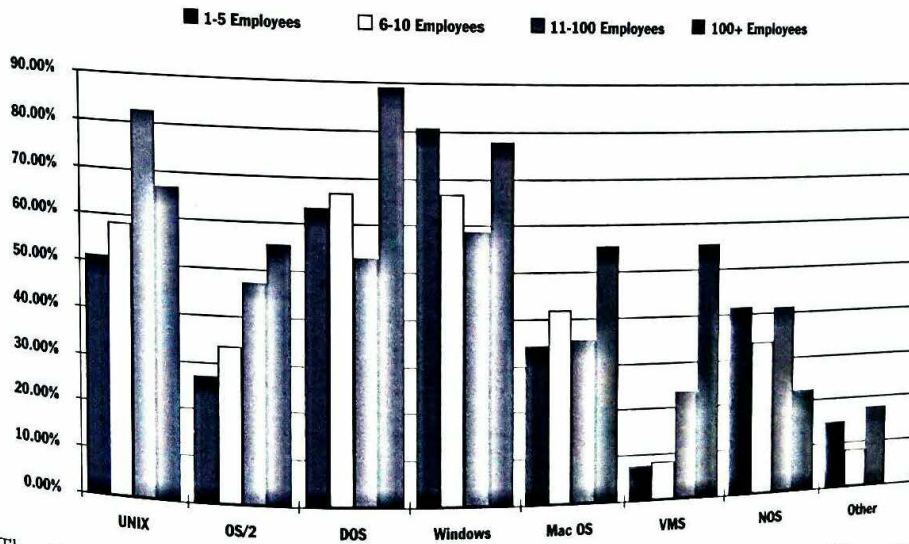
## PERCENTAGE OF COMPANY'S FUTURE (1995) REVENUE BY PLATFORM



As of 1992, none of the firms were doing any services or products for palmtops or pen computers.

However, all groups expect to be doing creating some services and/or products for this platform by 1995.

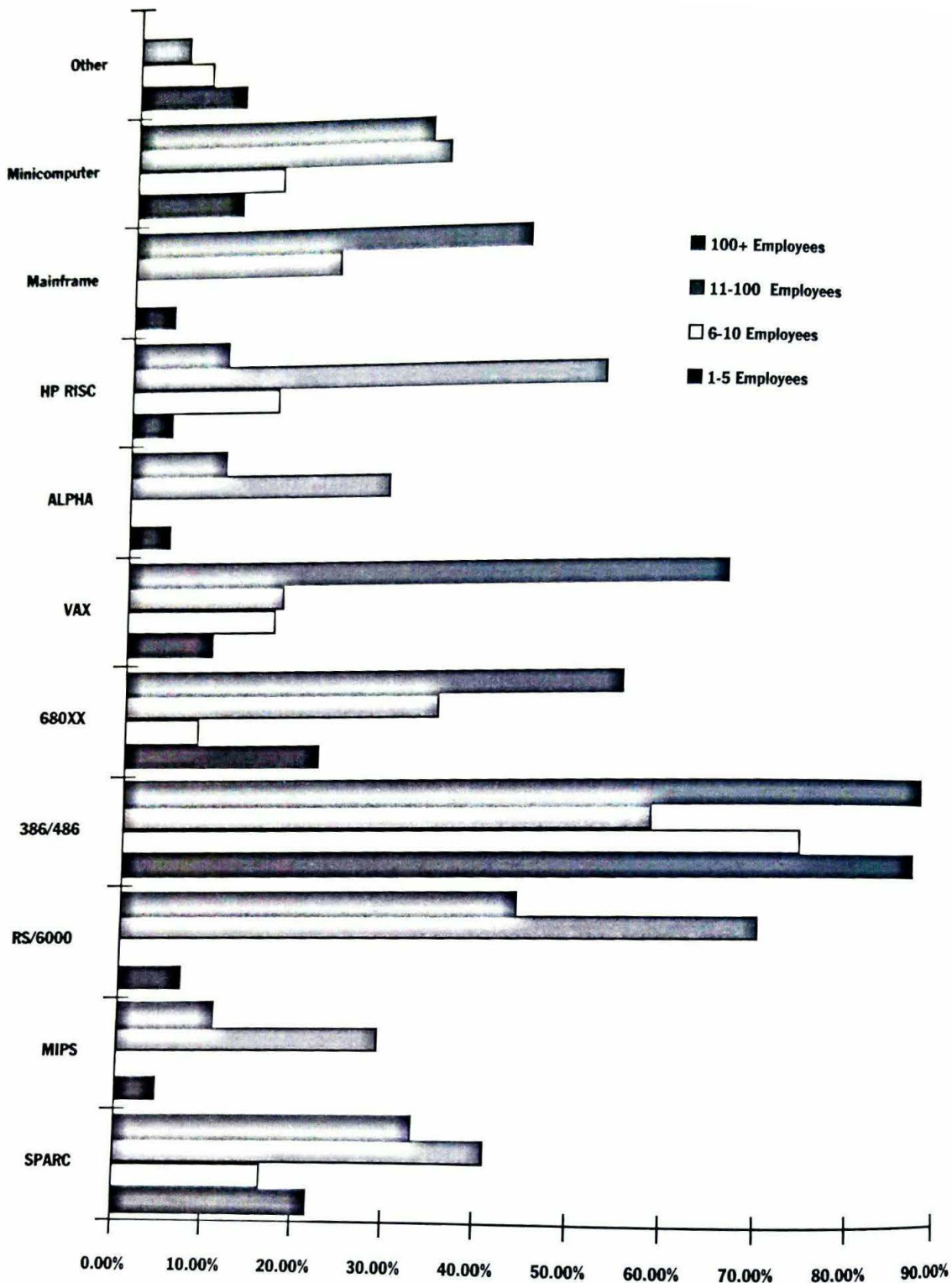
## OPERATING SYSTEM PLAN TO USE BY 1995



The shift toward UNIX follows the national trend as reported by Forrester Research Inc of Cambridge, Mass. which has tracked the downsizing in the computer industry. The firm says 80 percent of the Fortune 1000 corporations it interviewed are seriously looking to move away from a dependence on main-

frame computers. The shift toward downsizing for many companies involves a shift towards UNIX. According to Dataquest, projected sales of UNIX-based computers will top \$44 billion in 1996 compared with \$18 billion in 1991.

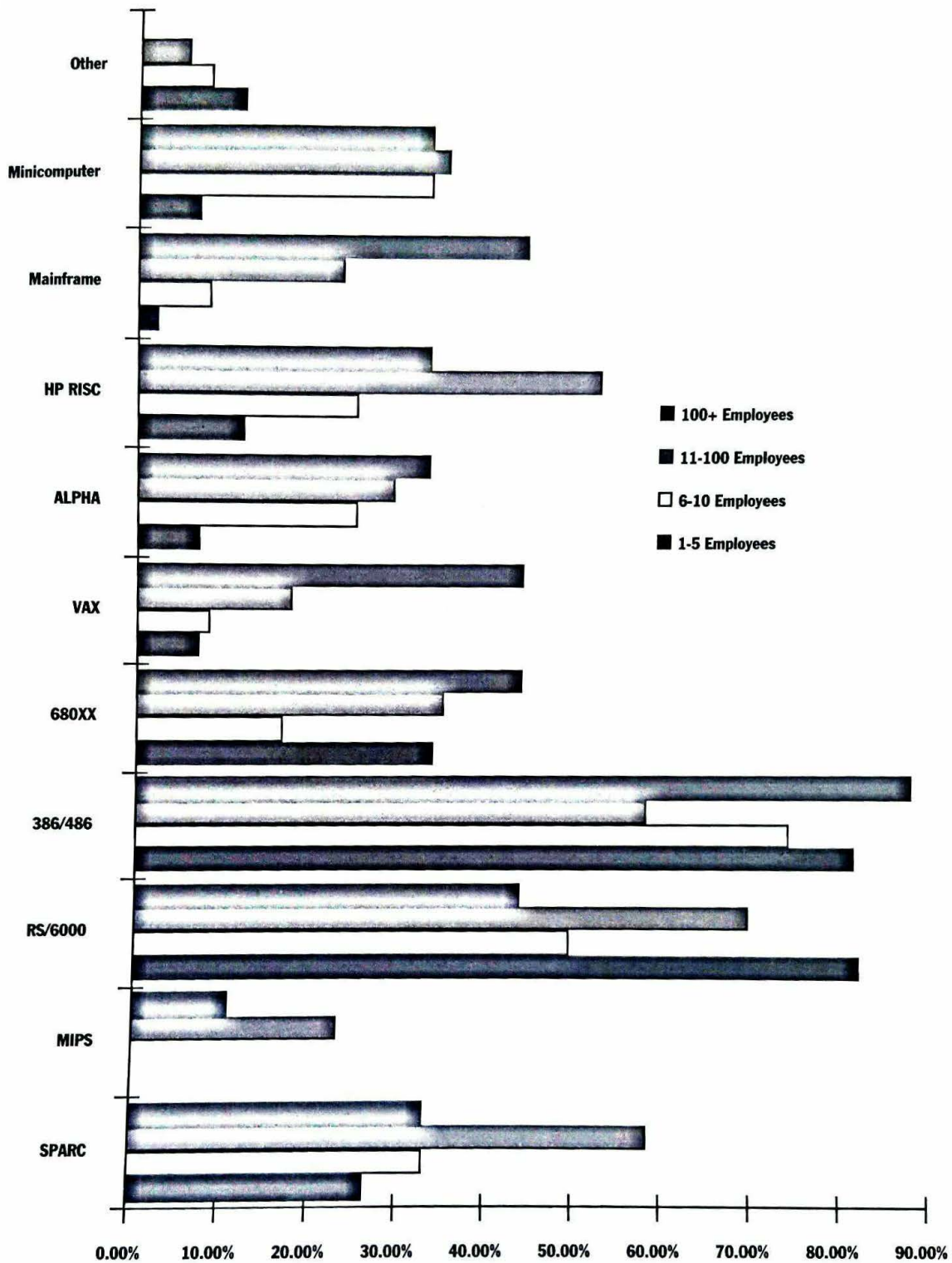
## COMPUTER ARCHITECTURE CURRENTLY USING



Desktop systems show the strongest current and future allegiance by all firms. The 386/486 is the dominate architecture and it is expected to remain strong into 1995. All groups, also anticipate an increase in the use of Motorola's 680xx architecture.

In line with national market predictions, workstation architectures are expected to increase significantly. 6-10 firms expect a substantial increase in minicomputers by 1995. The RS/6000 has a strong current base with 11-100 firms and is expected to have a stronger showing in all sized firms by 1995, especially 1-5 sized firms.

### COMPUTER ARCHITECTURE PLAN TO USE BY 1995



As of 1992, large computer systems have a strong advocate in 100+ firms. All groups expect to increase their use of DEC's Alpha architecture by 1995 which is accompanied by an anticipated decrease by all but the 11-100 group in their use of DEC's VAX architecture.

## SOFTWARE MARKETS: PERCENTAGE FIRMS CURRENTLY TARGETING/PLAN TO TARGET BY 1995

Software Markets	1-5 Employees			6-10 Employees			11-100 Employees			100+ Employees		
	Currently Targeting	Target By 1995	% Change	Currently Targeting	Target By 1995	% Change	Currently Targeting	Target By 1995	% Change	Currently Targeting	Target By 1995	% Change
Federal Government	17.00%	24.00%	41.18%	25.00%	16.67%	-33.32%	35.29%	47.06%	33.35%	40.00%	40.00%	0.00%
State Government	24.00%	24.00%	0.00%	25.00%	16.67%	-33.32%	35.29%	29.41%	-16.66%	40.00%	50.00%	25.00%
Local Government	10.00%	15.00%	50.00%	8.33%	0.00%	-100.00%	29.41%	29.41%	0.00%	20.00%	20.00%	0.00%
Marketing	12.00%	12.00%	0.00%	25.00%	25.00%	0.00%	11.76%	11.76%	0.00%	0.00%	0.00%	0.00%
Manufacturing	37.00%	34.00%	-8.11%	25.00%	25.00%	0.00%	35.29%	47.06%	33.35%	40.00%	40.00%	0.00%
Finance/Accounting	27.00%	17.00%	-37.04%	25.00%	25.00%	0.00%	35.29%	17.65%	-49.99%	20.00%	20.00%	0.00%
Desktop Publishing	12.00%	15.00%	25.00%	8.33%	8.33%	0.00%	5.88%	5.88%	0.00%	0.00%	0.00%	0.00%
Legal	15.00%	17.00%	13.33%	16.67%	16.67%	0.00%	5.88%	17.65%	200.17%	0.00%	0.00%	0.00%
Oil/Gas/Chemical	20.00%	29.00%	45.00%	16.67%	8.33%	-50.03%	23.53%	29.41%	24.99%	30.00%	30.00%	0.00%
Utilities	10.00%	10.00%	0.00%	16.67%	8.33%	-50.03%	29.41%	23.53%	-19.99%	10.00%	20.00%	100.00%
Medical/Health Services	29.00%	24.00%	-17.24%	33.33%	25.00%	-24.99%	11.76%	23.53%	100.09%	10.00%	20.00%	100.00%
Insurance	22.00%	20.00%	-9.09%	8.33%	8.33%	0.00%	29.41%	11.76%	-60.01%	20.00%	10.00%	-50.00%
Scientific Research	20.00%	22.00%	10.00%	41.67%	25.00%	-40.00%	17.65%	29.41%	66.63%	40.00%	30.00%	-25.00%
Engineering	32.00%	29.00%	-9.38%	25.00%	33.33%	33.32%	41.18%	47.06%	14.28%	40.00%	30.00%	-25.00%
Academic/Education	20.00%	20.00%	0.00%	16.67%	25.00%	49.97%	17.65%	29.41%	66.63%	10.00%	20.00%	100.00%
Training	17.00%	7.00%	-58.82%	16.67%	25.00%	49.97%	23.53%	29.41%	24.99%	20.00%	10.00%	-50.00%
Entertainment	5.00%	10.00%	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Other	39.00%	29.00%	-25.64%	0.00%	8.33%	#DIV/0!	11.76%	0.00%	-100.00%	10.00%	0.00%	-100.00%

Respondents were asked to indicate which software markets they were currently targeting and which markets they plan to target by 1995.

### Government Market

The only group with plans to increase participation by 1995 in the state government market was the 100+ firms (25%). 6-10 and 11-100 firms plan to decrease participation in the state government software market. Increased participation in federal government is planned by 1-5 firms (41%) and 11-100 firms (33.35%), 6-10 firms plan to decrease (33%) by 1995. 1-5 firms plan to increase participation in local government software markets while 6-10 firms plan to decrease participation. No change is anticipated by 11-100 and 100+ firms.

### Business

1-5 firms anticipate a decrease in manufacturing and finance/accounting software markets, an increase in desktop publishing and legal software markets and no change in the marketing software market by 1995. 6-10 firms anticipate no significant change in business software markets by 1995. 11-100 firms anticipate an increase in manufacturing and legal markets,

a 50% decrease in finance/accounting and no change in marketing and desktop publishing software markets by 1995. 100+ firms anticipate no significant change in business software markets by 1995.

1-5 firms were the only group to anticipate an increase in the desktop publishing software markets by 1995, all others anticipate no change. All groups expect no change in the marketing software market by 1995.

### Utilities

1-5 firms expect to increase participation in the oil/gas/chemical software markets, no change in utilities software and a decrease in medical/health services and insurance software markets by 1995. 6-10 firms anticipate decreases in all but insurance software markets where they anticipate no change by 1995. 11-100 firms anticipate increases in oil/gas/chemical and medical/health services and a decrease in utilities and insurance software markets by 1995. 100+ firms were the only group to anticipate an increase in the utilities software markets, they also anticipate an increase in medical/health services, a decrease in insurance and no change in oil/gas chemical software markets by 1995.

100+ firms were the only group to anticipate an increase in the utilities software market by 1995. All groups anticipate that the insurance software market will decrease or remain constant (6-10 employees) by 1995.

### Scientific

1-5 firms plan to increase their participation in scientific research and decrease in engineering by 1995. 6-10 firms anticipate a decrease in scientific research and an increase in engineering markets. 11-100 firms anticipate increase in both markets. 100+ firms anticipate a decrease in both markets by 1995.

### Education/Entertainment

All but 1-5 firms anticipate an increase in the academic/education markets by 1995. Only 1-5 firms anticipate an increase in the entertainment market all others anticipate no change by 1995. 1-5 firms and 100+ firms anticipate a decrease and 6-10 and 11-100 firms anticipate an increase by 1995 in the training software markets.



## PRODUCT APPLICATIONS: HAVE DEVELOPED/UNDER DEVELOPMENT

Product Applications	1-5 Employees			6-10 Employees			11-100 Employees			100+ Employees		
	Have Developed	Under Development	% Change	Have Developed	Under Development	% Change	Have Developed	Under Development	% Change	Have Developed	Under Development	% Change
Word Processing	7.00%	10.00%	<b>42.86%</b>	8.33%	0.00%	<b>-100.00%</b>	5.88%	5.88%	<b>0.00%</b>	0.00%	0.00%	<b>0.00%</b>
Database	34.00%	24.00%	<b>-29.41%</b>	33.30%	16.67%	<b>-49.94%</b>	19.65%	17.65%	<b>-10.18%</b>	10.00%	10.00%	<b>0.00%</b>
Statistical/Mathematical	17.00%	20.00%	<b>17.65%</b>	0.00%	0.00%	<b>0.00%</b>	11.76%	11.76%	<b>0.00%</b>	20.00%	20.00%	<b>0.00%</b>
Spreadsheet Analysis	7.00%	12.00%	<b>71.43%</b>	8.33%	0.00%	<b>-100.00%</b>	0.00%	0.00%	<b>0.00%</b>	10.00%	10.00%	<b>0.00%</b>
Accounting/Payroll/Tax	27.00%	10.00%	<b>-62.96%</b>	25.00%	0.00%	<b>-100.00%</b>	29.41%	23.53%	<b>-19.99%</b>	0.00%	20.00%	<b>0.00%</b>
Graphics	24.00%	20.00%	<b>-16.67%</b>	8.33%	33.33%	<b>300.12%</b>	29.41%	23.53%	<b>-19.99%</b>	30.00%	30.00%	<b>0.00%</b>
Desktop Publishing	2.00%	7.00%	<b>250.00%</b>	0.00%	0.00%	<b>0.00%</b>	0.00%	0.00%	<b>0.00%</b>	0.00%	0.00%	<b>0.00%</b>
Multimedia	10.00%	5.00%	<b>-50.00%</b>	8.33%	0.00%	<b>-100.00%</b>	0.00%	11.76%	<b>0.00%</b>	30.00%	30.00%	<b>0.00%</b>
Scientific	12.00%	10.00%	<b>-16.67%</b>	33.33%	33.33%	<b>0.00%</b>	17.65%	17.65%	<b>0.00%</b>	30.00%	30.00%	<b>0.00%</b>
CAD/CAM	20.00%	12.00%	<b>-40.00%</b>	8.33%	0.00%	<b>-100.00%</b>	23.53%	17.65%	<b>-24.99%</b>	20.00%	20.00%	<b>0.00%</b>
Imaging Systems	10.00%	17.00%	<b>70.00%</b>	8.33%	16.67%	<b>100.12%</b>	5.88%	0.00%	<b>-100.00%</b>	10.00%	20.00%	<b>100.00%</b>
Telecommunications	7.00%	5.00%	<b>-28.57%</b>	8.33%	16.67%	<b>100.12%</b>	23.53%	23.53%	<b>0.00%</b>	30.00%	20.00%	<b>-33.33%</b>
Groupware	5.00%	2.00%	<b>-60.00%</b>	8.33%	0.00%	<b>-100.00%</b>	23.53%	17.65%	<b>-24.99%</b>	10.00%	10.00%	<b>0.00%</b>
Audio	2.00%	2.00%	<b>0.00%</b>	0.00%	0.00%	<b>0.00%</b>	0.00%	5.88%	<b>0.00%</b>	10.00%	10.00%	<b>0.00%</b>
Expert Systems	12.00%	15.00%	<b>25.00%</b>	8.33%	8.33%	<b>0.00%</b>	11.76%	17.65%	<b>50.09%</b>	20.00%	20.00%	<b>0.00%</b>
Virtual Reality	2.00%	10.00%	<b>400.00%</b>	0.00%	0.00%	<b>0.00%</b>	17.65%	17.65%	<b>0.00%</b>	0.00%	10.00%	<b>0.00%</b>
Simulation	5.00%	7.00%	<b>40.00%</b>	0.00%	0.00%	<b>0.00%</b>	23.53%	23.53%	<b>0.00%</b>	20.00%	20.00%	<b>0.00%</b>
Animation	10.00%	5.00%	<b>-50.00%</b>	0.00%	0.00%	<b>0.00%</b>	0.00%	0.00%	<b>0.00%</b>	0.00%	0.00%	<b>0.00%</b>
Other	24.00%	22.00%	<b>-8.33%</b>	25.00%	25.00%	<b>0.00%</b>	35.29%	23.53%	<b>-33.32%</b>	30.00%	20.00%	<b>-33.33%</b>

Respondents were asked to indicate which product applications they have developed and which product applications they have under development.

The number of firms doing database applications development significantly decrease for 1-5, 6-10 and 11-100 firms while 100+ firms remain constant. Accounting/payroll/tax applications development decrease for all but 100+ firms. While 100+ firms have not developed accounting/payroll/tax applications they do have such applications under development.

Graphics applications development decrease for 1-5 and 11-100 firms, increase for 6-10 firms and remain

constant for 100+ firms. The only group to increase product applications development for desktop publishing is 1-5 firms all other groups show no change. Multimedia applications development increase for 11-100, decrease for 1-5 and 6-10 firms and show no change for 100+ firms.

Scientific applications under development decrease for 1-5 firms and remain constant for the other groups. CAD/CAM applications development decrease for all but 100+ firms whose CAD/CAM applications development remain at 20%. Imaging system applications under development increase for all but 11-100 firms.

Groupware applications development decrease for all but 100+ firms. 11-100 firms are the only group to increase development in audio applications. 1-5 and 11-100 firms increase product applications development in expert systems while 6-10 and 100+ firms remain constant.

Virtual reality applications under development increase for 1-5 and 100+ firms. Simulation application development shows no significant change for all groups and 1-5 firms are the only group to increase animation applications development.

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**Directory**  
**Austin Area Software Development**  
**Firms**

*August 1993*

**A Personal Comptroller, Inc.\***  
5808 Balcones Drive, Ste. 105  
Austin, TX 78731  
458-8171

**Aardvark Development Labs**  
#4 Red Bud Cove  
Austin, TX 78746  
327-2255

**ABM Data Systems, Inc.\***  
9020 Capital of Texas Highway  
North, Suite 540  
Austin, TX 78759  
345-6900

**Academic Computing Systems**  
5524 Bee Caves Road  
Austin, TX 78746  
327-4320

**Accelerated Drafting Service\***  
11754 Jollyville Road,  
Suite 110  
Austin, TX 78759  
258-0399

**Access Technologies, Inc.\***  
P.O. Box 202197  
Austin, TX 78720  
343-9564

**ACR Computers\***  
12034 Research Blvd., Westwood  
Plaza #10  
Austin, TX 78759  
331-9990

**Adams Computer Systems\***  
13276 Research  
#106  
Austin, TX 78750  
258-6676

**Addressing Your Needs Inc.\***  
5918 W. Courtyard Drive,  
Suite 340  
Austin, TX 78730  
794-8004

**Advanced Procurement Systems\***  
9130 Jollyville Road, Suite 355  
Austin, TX 78759  
338-0091

**Advanced Programming Concepts\***  
102 West Lake Drive  
Suite 109  
Austin, TX 78746  
327-6795

**Advanced Solutions International, Inc.\***  
301 Hesters Crossing  
Suite 202  
Round Rock, TX 78681

**Advanced Tactical Systems, Inc.**  
102 Westlake Drive, Ste. 109  
Austin, TX 78746  
327-6795

**Advantage Micro Systems, Inc.**  
11906 Knights Bridge  
Austin, TX 78759  
258-7485

**AGS Computers, Inc.\***  
9430 Research Blvd.  
Austin, TX 78759  
343-4539

**Alliance Computer Services\***  
13706 Research Blvd., Suite 110  
Austin, TX 78750  
258-3076

**Alliance Technologies, Inc.**  
6034 West Courtyard, Drive #250  
Austin, TX 78730  
794-9856

**Alpha Research Corporation**  
10435 Burnet Road  
#109  
Austin, TX 78758  
836-0709

**AMD**  
5204 E Ben White Boulevard  
Austin, TX 78741  
385-8542

**American Innovations**  
3355 Bee Caves Road  
Austin, TX 78746  
329-3400

**American Interface Computers\***  
1705 Capital of Texas Hwy S  
#200  
Austin, TX 78746  
327-5344

**Analysts International Corporation**  
9442 N. Capital of Texas Hwy. Suite  
1-300  
Austin, TX 78759  
794-8016

**Andersen Consulting**  
701 Brazos  
Suite 1020  
Austin, TX 78701  
472-2323

**ANDOC Group Inc.**  
PO Box 26550  
Austin, TX 78755  
346-1606

**Andrew KMW Systems**  
4301 Westbank Drive  
Austin, TX 78730  
314-3189

**Applied Design Concepts**  
P.O. Box 210267  
Austin, TX 78755  
832-1606

**Applied Services Group, Inc**  
4003 Brookview Road  
Austin, TX 78722  
473-8656

**Arcus Inc.**  
16 Sugarshack Drive  
Austin, TX 78746  
327-2046

**Atrium Technology**  
5000 Plaza on the Lake  
Austin, TX 78746  
328-6977

**Audio Visual Computer Applications**  
11615 Angus Road  
Suite 112  
Austin, TX 78759  
250-8081

**Austin Business Computers Inc.**  
3103 Bee Caves Road, Suite 100  
Austin, TX 78746  
328-4747

**Austin Code Works**  
11100 Leafwood Lane  
Austin, TX 78750  
258-0785

**Austin Data Systems**

4926 Spicewood Springs Road,  
Austin, TX 78759  
794-8455

**Austin Digital, Inc.\***

602 West Avenue  
Austin, TX 78701  
452-8178

**Austin Micro Systems, Inc**

5926 Balcones Drive  
#130  
Austin, TX 78731  
837-8553

**Austin RTC Inc.**

12201 Technology Blvd.  
Suite 140  
Austin, TX 78741  
335-0001

**Austin Software Inc.**

PO Box 210835  
Austin, TX 78720  
258-4286

**Austin-Monaco Company**

6303 Smokey Hill Road  
Austin, TX 78736  
288-6088

**Automated Design Enterprises**

9420 Research Blvd.  
Austin, TX 78759  
345-1146

**Automated Marketing Solutions**

1120 Capital of Texas Hwy S.  
Austin, TX 78746  
329-1051

**Avanti Technology, Inc.**

13740 Research Blvd. Ste. R-1  
Austin, TX 78750  
335-1168

**Azar Computer Software Services,  
Inc\***

800 West Avenue  
#102  
Austin, TX 78701  
476-5085

**BDM International, Inc.\***

9020 Capital of Texas Highway Suite  
380  
Austin, TX 78759  
346-5827

**Bell, Reed & Lavery**

5610 Bayton Loop  
Austin, TX 78745  
892-5037

**Blade Technologies Inc**

6101 Balcones Drive  
#300  
Austin, TX 78731  
451-5156

**Blanket Solutions**

7707 Jester Blvd. #1  
Austin, TX 78750  
345-3963

**Boss International / Messon Interna-  
tional**

3345 Greystone Drive,  
Suite 100  
Austin, TX 78731  
346-1771

**Bradford Information Systems**

2819 Foster Lane  
#F216  
Austin, TX 78757  
459-8999

**Bragma Systems Inc.**

13706 Research Blvd Ste. 201  
Austin, TX 78750  
219-7270

**Brevard & Brevard**

4705 Travis View Ct.  
Austin, TX 78732  
266-2165

**Brightline Corp.**

PO Box 1299  
Cedar Park, TX 78613  
371-7284

**Business Resource Software, Inc\***

2013 Well Branch Parkway, Suite 305  
Austin, TX 78728  
251-7541

**Business Tools**

12104 Tweed Ct.  
Austin, TX 78727  
258-1245

**BW Systems\***

12707 Poquoson Drive  
Austin, TX 78727  
255-8350

**Byte by Byte Corporation**

9442-A Capital of Texas Hwy. N.,  
Ste. 650  
Austin, TX 78759  
795-0150

**C & H Distributors**

101 E. Starling Dr.  
Austin, TX 78753  
836-5502

**C E Britt & Associates**

9505 Marsh Drive  
Austin, TX 78748  
280-2299

**C Software Systems**

7512 Stonecliff Cr  
Austin, TX 78731  
345-5549

**C-Graph, Inc**

2222 Western Trails Blvd  
Austin, TX 78745  
444-3336

**Cablesmart!**

4809 White Elm Drive  
Austin, TX 78749  
892-5737

**Cafco Computer Systems**

2101 S IH35  
Austin, TX 78741  
448-1331

**Capital Network Systems**

600 Congress Avenue  
Suite 1360  
Austin, TX 78701  
476-1266

**Capital Software Systems Inc.**

PO Box 15748  
Austin, TX 78761  
343-7022



**Semarca Corp, The\***

3701 Executive Center Drive, Suite  
152  
Austin, TX 78731  
343-1049

**Sematech**

2706 Montopolis Drive  
Austin, TX 78741  
356-3500

**Serengeti Systems, Inc.\***

808 W. 10th Street, Suite 101  
Austin, TX 78701  
345-2211

**Serex Development**

1513-C West 6th Street  
Austin, TX 78703  
473-2514

**Side Line**

1406 Hillcrest Dr.  
Austin, TX 78723  
258-5438

**Silent Partners, Inc.\***

8727 Shoal Creek Blvd.  
Austin, TX 78757  
458-1191

**Snowbird Systems\***

3933-D Spicewood Springs Road  
Austin, TX 78759  
794-8334

**Softquest Inc**

8711 Burnet Road  
#F27  
Austin, TX 78758  
452-4500

**Software & Things\***

16005 Edwards Drive  
Austin, TX 78734

**Software Mart Inc.\***

3933 Spicewood Springs Road, Suite  
E-100  
Austin, TX 78759  
346-7887

**Software Support International, Inc.**

3201 Riva Ridge Rd.  
Austin, TX 78746  
(214) 403-0487

**Software Translations\***

1114 Lost Creek Blvd.,  
Suite 350  
Austin, TX 78746  
327-6001

**Source One, Inc.**

1811 Waterston Ave.  
Austin, TX 78703  
479-3938

**South West Computer Systems**

1110 W William Cannon Dr.  
Austin, TX 78745  
441-7844

**Southeastern Computer Consultants,  
Inc.**

223 W. Anderson Lane, Ste. 104  
Austin, TX 78752  
794-0033

**Southwest Network Services\***

9130 Jollyville Road  
#200  
Austin, TX 78759  
795-3000

**Southwest Software Inc.\***

3435 Greystone Drive,  
Suite 104  
Austin, TX 78731  
345-2493

**Southwestern Management Services  
Ltd.**

809 Terrace Mountain Dr.  
Austin, TX 78746  
327-0443

**Sparkright Solutions**

4907 Valley Oak Dr.  
Austin, TX 78731  
371-0949

**SRK Technologies**

2111 Dickson Dr., Ste. 2  
Austin, TX 78704  
447-4041

**Statco**

8870 Business Park Drive  
Austin, TX 78759  
454-4518

**Sterling Information Group, Inc.\***

1007 Mopac Circle, Suite 201  
Austin, TX 78746  
327-0090

**Stone Technologies Corp.\***

537 Woodward St.  
Austin, TX 78704  
440-1234

**Strata Systems\***

3355 Bee Caves Road, Suite 608  
Austin, TX 78746  
327-8334

**Strategic Solution Technologies**

7602 Bellflower Cv.  
Austin, TX 78758  
331-2028

**Structural Analysis, Inc.\***

3355 Bee Caves Rd., Ste. 501  
Austin, TX 78746  
328-8198

**Sun River Corporation**

2600 McHale Court  
Austin, TX 78758  
835-8001

**Sunrise Data, Inc.**

3400 Bear Tree Cir.  
Austin, TX 78730  
338-0631

**Switch Solutions, Inc.\***

1250 Capital of Texas Highway, Suite  
1-210  
Austin, TX 78746  
345-7100

**Symmetrix**

P.O. Box 160922  
Austin, TX 78716  
328-7799

**Synergistic Solution Technologies,  
Inc.\***

7602 Bell Flower Cove  
Austin, TX 78759  
331-2028

**Synergy Systems, Inc.**

4404 Balcones Woods Dr.  
Austin, TX 78759  
443-5669



**Covia**

8911 Capital of Texas N  
#3300  
Austin, TX 78759  
338-4242

**CPA Systems Inc.**

7600 Chevy Chase Dr.  
Austin, TX 78752  
458-9283

**Custom Data**

2709 S. Lamar, Suite 107  
Austin, TX 78704  
445-0003

**Custom System**

13581 Pond Springs Road  
Austin, TX 78729  
250-0443

**CW Systems, Inc.\***

600 Congress Avenue,  
Suite 2780  
Austin, TX 78701  
469-0245

**Cytec Software Systems, Inc.**

2312 Western Trails Blvd.  
Austin, TX 78745  
454-8755

**D2 Software**

2530 Pecos Street  
Austin, TX 78703  
478-2393

**Daniels & Mara\***

5 Concord Circle  
Austin, TX 78737  
288-2511

**Data Base Systems**

12000 W. Cow Path  
Austin, TX 78727  
795-9052

**Data Driver Products**

9701 Dessau Road, Ste. 800  
Austin, TX 78753  
339-8897

**Data Five Systems**

407 Skyline Drive  
Austin, TX 78746  
327-8235

**Data Interface Systems Corp.\***

8701 N. Mopac, Suite 415  
Austin, TX 78759  
346-5641

**Data Recognition, Inc**

9430 Research Boulevard  
Building IV, Suite 320  
Austin, TX 78759  
338-0459

**Data Recovery Services\***

13706 Research Blvd., Suite 110  
Austin, TX 78750  
258-3076

**Data Strategies, International**

9220 Capitol of Texas Hwy.  
Austin, TX 78759  
346-9401

**Datagraf, Inc. \***

6101 W. Courtyard Drive  
Bldg. 1  
Austin, TX 78730  
346-6866

**Datagraph Software Technologies Inc.\***

1515 Capital of Texas Highway  
South, Suite 112  
Austin, TX 78746  
327-6433

**Daven Group\***

12591 Research Blvd., Suite 101  
Austin, TX 78759  
258-0512

**DEC**

9442 N Capital of Texas Hwy  
Austin, TX 78759  
346-4332

**Dell Computer Corporation**

9505 Arboretum Blvd.  
Austin, TX 78759  
338-4400

**Design Technologies, Inc.**

107 Ranch Road  
620S  
Austin, TX 78734  
266-2093

**Digatex\***

4301 Westbank, Suite B310  
Austin, TX 78746  
328-8090

**DMS Associates**

1100 Constant Springs Drive  
Austin, TX 78746  
327-2594

**Donoho Design Group**

9430 Research Blvd.,  
Suite 4-400  
Austin, TX 78759  
343-4533

**Dresser Industries, Inc. - Wayne Division\***

3814 Jarrett Way  
Austin, TX 78728  
388-8522

**Druma Inc.\***

6448 Highway 290 East,  
Suite E-103  
Austin, TX 78723  
323-5411

**Dynix, Inc**

P.O. Box 1622  
Austin, TX 78767  
445-6369

**Eclipse Engineering Corp**

1513-C W 6th Street  
Austin, TX 78703  
473-2514

**Econo-Soft**

9200 N. Plaza, Ste. 1906  
Austin, TX 78753  
832-1675

**Eidosoft, Inc.\***

700 Rocky River Road  
Austin, TX 78746  
328-9145

**Ellis, M L and Associates, Inc.**

9430 Research Blvd. #400  
Austin, TX 78759  
343-4517

**Enfor Technologies\***

10610 Morado Circle, Ste 1232  
Austin, TX 78759  
338-9723



**Syscorp International**  
9430 Research Boulevard  
Austin, TX 78759  
338-5800

**Systems & Processes Engineering Corp**  
1406 Smith Rd.  
Austin, TX 78721  
385-0318

**Systems Insights\***  
West 12th Street  
Austin, TX 78767  
476-7599

**Systems Marketing & Education, Inc.**  
12416 Hymeadow Dr.  
Austin, TX 78750  
250-8127

**Tadpole Technology**  
12012 Technology Boulevard  
Austin, TX 78727  
219-2200

**Tam Systems Inc.**  
3409 Executive Ctr. Dr. 100  
Austin, TX 78731  
346-1826

**Tamarack Storage Devices**  
3500 W Balcomes Center Drive  
Austin, TX 78759  
338-3500

**Tandem Computers, Inc.\***  
14231 Tandem Blvd  
Austin, TX 78728  
244-8146

**Tarscosa Business Systems**  
PO Box 49078  
Austin, TX 78765  
454-0511

**Tech Mate**  
11970 Jollyville Rd.  
Austin, TX 78759  
258-9878

**Technologies Inc.**  
1611 Headway Cir. 3  
Austin, TX 78754  
339-0001

**Technology Works, Inc.**  
4030 W. Braker Ln.  
Austin, TX 78759  
794-8533

**Teisberg Software and Service**  
10808 Hard Rock Rd.  
Austin, TX 78750  
331-0959

**Telebyte Software Inc.**  
1401 Spring Garden Rd.  
Austin, TX 78746  
327-1840

**Telsort, Inc.**  
P.O. Box 43360  
Austin, TX 78745  
462-2994

**Tensleep Design, Inc.\***  
3809 S. 2nd St., Suite D-100  
Austin, TX 78704  
447-5558

**Tesseract**  
5802 Highland Hills Ter.  
Austin, TX 78731

**Tethys Corp. Inc.\***  
3755 Cap. of Tex. Hwy South, Suite  
169  
Austin, TX 78704  
292-0400

**Texas Databank**  
P.O. Box 164034  
Austin, TX 78716

**Texas Educational Consultive Services, Inc.**  
1005 E. St. Elmo Rd.  
Austin, TX 78745  
443-4433

**Texas Instruments**  
PO Box 149149  
Austin, TX 78714  
250-7111

**Texas Learning Technology Group\***  
P.O. Box 2847  
Austin, TX 78768  
467-0222

**Texas Research Institute\***  
415-A Crystal Creek Drive  
Austin, TX 78733  
263-2102

**TexasNet**  
1504 Wilson Heights  
Austin, TX 78746  
327-2194

**Third Coast Software, Inc\***  
8920 Business Park Drive  
Suite 370  
Austin, TX 78759  
343-8294

**Thomas Conrad Corporation**  
1908-R Kramer Lane  
Austin, TX 78758  
836-1935

**Tiburon/PSW3\***  
11044 Research Blvd.,  
Suite B-420  
Austin, TX 78759  
345-8613

**Tipton Cole+Co.\***  
305 Camp Craft Road,  
Suite 200  
Austin, TX 78716  
329-0060

**Tivoli Systems\***  
6034 W. Courtyard Drive,  
Suite 210  
Austin, TX 78730  
794-9070

**Toh Consulting Inc.**  
13131 New Boston Bnd.  
Austin, TX 78729  
335-7177

**Travelogix, Inc.**  
9420 Research Blvd.,  
Suite III-260  
Austin, TX 78759  
990-0102

**Tres Associates**  
512 E. Riverside Dr.  
Austin, TX 78704  
440-8488





**Proper Data**  
12103 Sage Hen Cir.  
Austin, TX 78727  
250-0287

**Protos Software Company\***  
5904 Bee Caves Road  
Austin, TX 78746  
869-1175

**Pryor Systems, Inc.\***  
1015 Bee Cave Woods Drive, Suite  
100  
Austin, TX 78746  
328-2053

**PSI Technology Corp.**  
3949 S. Lamar, Suite B  
Austin, TX 78704  
329-0081

**Publishing Experts\***  
7701 N. Lamar, Suite 116  
Austin, TX 78752  
451-7191

**Publishing Technologies Inc**  
7719 Wood Hollow Drive  
#260  
Austin, TX 78731  
346-2935

**Quadralay**  
8920 Business Park Drive  
Austin, TX 78759  
250-9652

**Quality Solutions\***  
6521 Needham Drive  
Austin, TX 78739  
288-6593

**Quintessence Computing**  
2904 Guadalupe  
Austin, TX 78705  
477-9038

**R&W Software Inc.**  
7718 Woodhollow Drive,  
Suite 200  
Austin, TX 78731  
343-1385

**Radian Corporation\***  
PO Box 201088  
Austin, TX 78720  
454-4797

**Ralph Kirkley Associates, Inc\***  
8500 N. MOPAC, Suite 402  
Austin, TX 78759  
346-3884

**Reality Computer Systems, Inc.**  
8868 Research Blvd. 104A  
Austin, TX 78758  
452-2593

**Renaissance Systems, Inc.\***  
320 Congress Ave., Ste. 200  
Austin, TX 78701  
474-8182

**Reveille Systems\***  
8710 Brodie Lane  
Austin, TX 78745  
282-6223

**RFD Co.\***  
106 E. 6th Street, Suite 750  
Austin, TX 78701  
473-2777

**Rioux Engineering, Inc.\***  
916 Capital of Texas Hwy. A115  
Austin, TX 78746  
327-3875

**River City Group, Inc.\***  
1717 West 6th Street, Suite 250  
Austin, TX 78703  
476-0400

**Rivers Edge Corporation**  
10100 Glencarrie Ln.  
Austin, TX 78750  
331-2001

**RMC**  
8911 Capital of Texas Highway North  
Austin, TX 78759  
343-1010

**Rochelle Communications**  
4030 W Braker Lane  
Austin, TX 78759  
794-0088

**Ross Technology Inc.**  
7748 Highway 290 West, Suite 400  
Austin, TX 78736  
448-8968

**Russell Computer Associates\***  
10406 Loring Dr.  
Austin, TX 78750  
331-5008

**Ryan McFarland**  
8911 N Capital of Texas  
Austin, TX 78759  
343-1010

**Sarbec**  
12326 Deerbrook Trl.  
Austin, TX 78750  
331-0966

**SAS Institute, Inc.\***  
PO Box 200075  
Austin, TX 78720  
258-5171

**Satellite Business Computers, Inc.\***  
103 12th Street, Suite 201  
Pflugerville, TX 78660  
251-2698

**Schlumberger-Center for Computer  
Research**  
PO Box 200015  
Austin, TX 78720  
331-3000

**Science Applications International  
Corp.\***  
1250 Capital of Texas Highway  
South, Suite I-360  
Austin, TX 78746  
329-2090

**Scientific & Engineering Software  
Inc.\***  
4301 West Bank Drive, Bldg. A  
Austin, TX 78746  
328-5544

**Scientific Measurement Systems, Inc.**  
2209 Donley Drive  
Austin, TX 78758  
837-4712

**Second Wave Inc**  
9430 Research Boulevard  
Austin, TX 78759  
343-9661



**Nova Graphics International\***  
1515 Capital of Texas Highway  
South, Suite 500  
Austin, TX 78746  
454-0658

**Nova Systems Inc.\***  
4818 East Ben White, Suite 200  
Austin, TX 78745  
443-1177

**Novell Inc.**  
5918 W. Courtyard Drive  
#170  
Austin, TX 78730  
346-8380

**Nth Graphics\***  
1908-A Krammer Lane  
Austin, TX 78758  
932-1944

**Oakhill Software\***  
5905 Shanghai Pierce Rd.  
Austin, TX 78749  
288-2329

**Odessa Engineering, Inc.\***  
1601 Headway Circle  
Austin, TX 78754  
834-4141

**Office Answer, Inc.**  
4 Sundown Pkwy.  
Austin, TX 78746  
327-6373

**Opcode, Inc.\***  
8850 Business Park Drive, #200  
Austin, TX 78759  
346-7090

**Optical Document Technologies**  
9390 Research Bld. #415  
Austin, TX 78759  
794-9492

**Optical Document Technologies, Inc.**  
9390 Research Blvd., Suite 415  
Austin, TX 78759  
794-9492

**Optimization Alternatives\***  
1100 W. 6th Steet, Suite D  
Austin, TX 78703  
479-4140

**Oracle Corporation**  
600 Congress Avenue  
Austin, TX 78701  
472-6060

**Origin Systems, Inc.\***  
110 Wild Basin Road, Suite 230  
Austin, TX 78746  
328-5490

**Overall Systems and Support, Inc.\***  
10207 Carlotta Cove  
Austin, TX 78733  
263-3654

**Ozz Research**  
9420 Research Blvd., Echelon 3,  
Suite 100  
Austin, TX 78759  
794-8590

**Parallel Geoscience Corporation\***  
4807 Spicewood Springs Rd., Bld. 2  
Austin, TX 78759  
346-4040

**Passport Communications, Inc.**  
1101 Capital of Texas Hwy, Ste. 250-  
F  
Austin, TX 78746

**Pavilion Technologies**  
3500 Balcones Center Drive  
Austin, TX 78759  
338-3377

**Paxson Enterprises Inc.**  
5676 Oak Blvd.  
Austin, TX 78735  
949-6801

**PCIA & M\***  
P.O. Box 15969  
Austin, TX 78761  
217-1463

**Pencom Software\***  
9050 Capital of Texas Highway  
#300  
Austin, TX 78759  
343-1111

**Pet Software**  
P.O. Box 200788  
Austin, TX 78720  
219-7054

**Photos Software Co.**  
PO Box 164050  
Austin, TX 78716  
327-8770

**Pin Craft**  
7862 El Dorado Dr.  
Austin, TX 78737  
288-4467

**Planview, Inc.\***  
7320 N. Mopac, Suite 312  
Austin, TX 78731  
346-8600

**Polygon Software & Consulting\***  
807 Brazos  
Suite 802  
Austin, TX 78701  
450-1920

**Precision Computer Systems\***  
5212 Meadow Creek Drive  
Austin, TX 78745  
(602) 829-3131

**Private Sector**  
9203 Spring Hollow Dr.  
Austin, TX 78750  
331-1097

**ProBusiness Systems\***  
8307 Shoal Creek Boulevard  
Austin, TX 78758  
459-8777

**Process Improvement Products\***  
PO Box 5333  
Austin, TX 78763  
451-6616

**Professional Business Systems\***  
4711 Spicewood Springs Road, Suite  
157  
Austin, TX 78765  
343-1967

**Professional Impressions, Inc\***  
901 S. MOPAC Blvd., Suite II-500  
Austin, TX 78746  
327-3377

**Profitmaster Computer Systems Inc**  
12414 Alderbrook Drive  
Austin, TX 78758  
835-7085



**Logic Group, Inc.\***  
2630 Expo Blvd., G-14  
Austin, TX 78703  
451-5707

**Logical Information Machines\***  
8920 Business Park Drive,  
Suite 371  
Austin, TX 78759  
346-5464

**Longhorn Systems, Inc.**  
3202 W. Anderson Lane  
Austin, TX 78757  
451-9307

**Mac Management Systems**  
620 Congress Avenue,  
Suite 200  
Austin, TX 78701  
477-4747

**Macworks**  
12636 Research Blvd.,  
Ste. B-104  
Austin, TX 78759

**Mag-Rabbit, Inc.**  
2020 Centimeter Circle  
Austin, TX 78758  
339-7875

**Majec Systems Inc.\***  
5758 Balcones Drive, Suite 102  
Austin, TX 78761  
452-1138

**Map Resource, Inc.**  
12593 Research Blvd., Ste 303  
Austin, TX 78759  
219-7890

**MapFrame Corporation**  
1317 Spyglass Court  
Austin, TX 78746  
328-4115

**MCC Software Technology**  
3500 W. Balcones Center Drive  
Austin, TX 78759  
338-3330

**McKinney, Ewing and Associates,  
Inc.\***  
3307 Northland Drive, Suite 280  
Austin, TX 78731  
451-9516

**Mechanics Software\***  
4410 Avenue C  
Austin, TX  
467-2889

**Media Methods\***  
3812 Cherrywood  
Austin, TX 78722  
476-0422

**Medic Computer Systems Inc.\***  
110 Wild Basin, Suite 160  
Austin, TX 78746  
329-0070

**Mesa Software, Inc.\***  
3435 Graystone Drive,  
Suite 106  
Austin, TX 78731  
346-1771

**Micro Information Products, Inc.**  
505 E. Huntland Drive, Ste. 340  
Austin, TX 78752  
454-5004

**Micro Interface**  
1408 Commerce Street  
Temple, TX 76504  
771-3363

**Micro-Analyst, Inc.**  
401 Terrace Mountain Drive  
Austin, TX 78746  
327-1271

**Microcity**  
10300 Metric Boulevard  
Austin, TX 78758  
339-6479

**Micromain Corp.\***  
500 Loop 360 Nrth, # 6-110  
Austin, TX 78746  
328-3235

**Millenium Graphics, Inc.**  
14600 Agarita Road  
Austin, TX 78734  
338-1213

**Mind's Eye Images\***  
3606 Grooms Street  
Austin, TX 78705  
472-1005

**MIS Software Co.**  
8870 Business Park Drive  
Austin, TX 78759  
795-5020

**Montgomery Municipal Supply, Inc.**  
7202 Spurlock Drive  
Austin, TX 78731  
343-7017

**Motorola, Inc.\* (Microprocessor  
Group)**  
6501 William Cannon Blvd.  
Austin, TX 78735  
891-2840

**Mount Bonnell, Inc.**  
1201 W. 24th Street, Ste. 103  
Austin, TX 78705  
478-7407

**MPSI Systems, Inc.**  
108 Wild Basin Rd. South, #300  
Austin, TX 78746  
(918) 250-9611

**National Design, Inc.**  
9171 Capital of Texas Highway  
North, Suite 230  
Austin, TX 78759  
343-5055

**National Instruments**  
6504 Bridge Point Parkway  
Austin, TX 78730  
338-9119

**New Horizons Software Inc.**  
206 Wild Basin, Suite 109  
Austin, TX 78746  
328-6650

**Nirvana Systems Inc.**  
3415 Greystone, Suite 205  
Austin, TX 78731  
345-2545

**Northstar Control, Inc.\***  
4205 North Hills Drive  
Austin, TX 78731  
467-8380

**Nova Concepts Inc.**  
505 E. Huntland Drive,  
Suite 330  
Austin, TX 78752  
458-6682



**Capitol Computer Services, Inc.**  
PO Box 517  
Austin, TX 78767  
477-3980

**Case Design, Inc**  
9111 Jollyville Road  
Austin, TX 78759  
346-8991

**Cherry Software**  
11827 Carshalton Dr.  
Austin, TX 78758  
835-2267

**Cimpoint**  
505 E Huntland Dr  
Austin, TX 78752  
458-1112

**Cleveland Consulting Associates**  
8911 Capital of Texas Highway, Suite  
2200  
Austin, TX 78759  
343-6084

**Clugg, Lyle & Associates, Inc.**  
11900 Rickem Cv.  
Austin, TX 78758  
339-1268

**Collaborative Technologies Corpora-  
tion**  
8920 Business Park Drive  
Suite 100  
Austin, TX 78759  
794-8858

**Colleague Business Software, Inc.**  
10000 Research Blvd., Suite 210  
Austin, TX 78759  
345-9964

**Columbia Scientific Industries, Inc.**  
P.O. Box 203190  
Austin, TX 78720  
258-5191

**Commercial Information Systems,  
Inc.\***  
3918 Caney Creek Rd.  
Austin, TX 78732  
266-9064

**Compliance Data Systems, Inc.**  
2520 Longview Street,  
Suite 407  
Austin, TX 78705  
474-6286

**Comprotek Services**  
10435 Burnet Road  
Austin, TX 78758  
832-9151

**CompuSeai, Inc**  
8920 Business Park Drive  
Austin, TX 78759  
794-9994

**Computational Logic Inc\***  
1717 W 6th Street  
Austin, Tx 78703  
322-9951

**Computational Mechanics Co.**  
7701 N. Lamar, Suite 200  
Austin, TX 78752  
467-0618

**Computer Algorithm Development**  
2806-A Nueces  
Austin, TX 78705  
474-6511

**Computer Application Specialists**  
P.O. 201538  
Austin, TX 78720  
250-5434

**Computer Associates International\***  
3001 Bee Cave Road  
Austin, TX 78746  
328-5400

**Computer Electronics Co.**  
1314 Quailfield Circle  
Austin, TX 78758  
836-2926

**Computer Synergy Inc.\***  
PO Box 610  
Cedar Park, TX 78613  
258-0212

**Computerinstructor**  
6448 Hwy 290 E  
#B-101  
Austin, TX 78723  
453-6050

**Computerman Mobil Computer Store**  
9705 Burnet Rd. Ste. 109  
Austin, TX 78758  
836-9442

**Computers, Etc. of Austin**  
9805 Inca Lane  
Austin, TX 78733  
282-0679

**Comshare, Inc.\***  
9600 Great Hills Trail, Suite 300E  
Austin, TX 78759  
794-9119

**Congruent Technologies, Inc.**  
9065 Jollyville Road  
Austin, TX 78759  
346-4761

**Consolidated Products Inc.**  
2170 Woodward Street  
Austin, TX 78744  
445-5100

**Continuum Company**  
9500 Arboretum Blvd.  
Austin, TX 78759  
345-5700

**Cook - Hurlbert, Inc.\***  
9111 Jollyville Road, Suite 105  
Austin, TX 78759  
338-1711

**Cooperative Computing, Inc.**  
1001 Capital of Texas Hwy.  
Austin, TX 78746  
328-2300

**Corporate Memory Systems**  
8920 Business Park Drive  
Austin, TX 78759  
795-9999

**Correct Technology\***  
4705 Richmond Avenue  
Austin, TX 78745  
443-4817

**Counselor Systems, Inc.**  
8820 Business Pk. Dr., Ste. 300  
Austin, TX 78759  
338-4188

**InfoEdge Technology, Inc.\***  
200 East Sixth Street, Suite 204  
Austin, TX 78701  
472-3375

**Infoquest\***  
6809 Falcata Cove  
Austin, TX 78750  
335-5733

**Informa, Inc.**  
6300 Bridgepoint Pkwy., #150  
Austin, TX 78730  
338-4499

**Information Concepts & Technologies, Inc.\***  
8000 Anderson Square, #300  
Austin, TX 78758  
328-6455

**Innovative Software Consultants**  
522 Grace Lane  
Austin, TX 78746  
263-5806

**Integral Signal Processing**  
7719 Wood Hollow Drive,  
Suite 219  
Austin, TX 78731  
346-1451

**Intera Inc.**  
6850 Austin Center Blvd.,  
Suite 300  
Austin, TX 78731  
346-2000

**Interactive Systems Corporation**  
9442 Capital of Texas Highway, Suite  
1-700  
Austin, TX 78759  
343-0375

**Intercim Corporation**  
4030-2 West Braker Lane,  
Suite 200  
Austin, TX 78759  
458-1112

**Intercontinental Cable Service, Inc.**  
1515 S. Capital of Texas Hwy.  
Austin, TX 78746  
442-8045

**InterFace Computer\***  
1705 Capital of Texas Highway South  
Austin, TX 78746  
327-5344

**International Real-Time Resources Inc.**  
9020 Capital of Texas Highway  
North, Suite 420  
Austin, TX 78759  
346-9401

**International Software Systems, Inc.\***  
4821 Spicewood Springs  
Suite 103  
Austin, TX 78759  
346-2277

**Irrigation Software Co.**  
632 Slaughter Lane West, #206  
Austin, TX 78748  
282-0809

**Isquare, Inc\***  
4408 Spicewood Springs  
#200  
Austin, TX 78759  
343-9495

**James L. Lloyd & Associates\***  
4826 Twin Valley Drive  
Austin, TX 78731  
451-8769

**Jim Neely & Associates\***  
505 E. Huntland Drive, Ste. 480  
Austin, TX 78752  
454-0486

**Juniper Systems, Inc.\***  
102 Westlake Drive, Suite 105  
Austin, TX 78746  
327-3968

**Just In Time Resources International, Inc.\***  
1705 S. Capital of Texas Hwy., #400  
Austin, TX 78746  
328-1241

**Kahle Technology Systems\***  
1801 Lavaca, Suite 15-J  
Austin, TX 78701  
480-0323

**Kalin & Lovgren Associates\***  
P.O. Box 200848  
Austin, TX 78720  
794-0391

**Kaufman Associates\***  
515 Capital of Texas Hwy. South,  
Suite 240  
Austin, TX 78746  
328-1648

**KGB Software\***  
8104 Emberwood Dr.  
Austin, TX 78758  
453-3369

**KIDASA Software, Inc.\***  
1114 Lost Creek Blvd.,  
Suite 340  
Austin, TX 78746  
328-0167

**L E Systems**  
13010 Research Blvd., Rm. 220  
Austin, TX 78750  
258-3828

**Lansing Pugh Associates\***  
3100 S. Lamar, Suite 204  
Austin, TX 78704  
441-4666

**Lesaux Media Service\***  
3101 Shoreline, Ste 1926  
Austin, TX 78728  
244-7003

**Liberty Research Corp.\***  
1701 Director's Blvd., Suite 900  
Austin, TX 78744  
259-0646

**Liberty Software Inc.**  
3409 Executive Center Drive, Suite  
120  
Austin, TX 78731  
345-2627

**Linden Technologies, Ltd.**  
8920 Business Park Drive  
Austin, TX 78759  
794-9994

**Lockheed Austin Division\***  
Box 17100  
Austin, TX 78744  
386-1593



**ENTRA, Inc.\***  
P.O. Box 201915  
Austin, TX 78720  
335-3777

**Equitrac Corporation**  
12820 Hillcrest, Suite 209  
Dallas, TX 75230  
280-9266

**Evolutionary Technologies, Inc**  
8920 Business Park Drive  
Austin, TX 78759  
346-3813

**Expert Application Systems, Inc.\***  
8920 Business Park Drive  
Austin, TX 78759  
338-9773

**Factorial Systems**  
6300 Bridgepoint Parkway  
#350  
Austin, TX 78730  
345-1192

**Fairchild/Rohrer\***  
2604 Greenland Ln.  
Austin, TX 78745  
443-1983

**Fast Parts, Inc.**  
220 Slaughter Ln. West  
Austin, TX 78748  
282-7414

**FASTMAN, Inc.**  
12707 Pond Wood Road  
#2013  
Austin, TX 78729  
219-6699

**Financial Products**  
816 Vanguard Street  
Austin, TX 78734  
261-5772

**Financial Software Innovations\***  
7718 Wood Hollow Drive  
Suite 200  
Austin, TX  
343-1385

**FINLE Technologies\***  
P.O. Box 162712  
Austin, TX 78716  
327-3781

**First Market Research Corp**  
2301 Hancock Drive  
Austin, TX 78756  
451-4000

**FormFill, Inc.\***  
3409 Executive Center Drive, Suite  
212  
Austin, TX 78731  
343-7991

**Fourth State Technology**  
8920 Business Park Drive  
Austin, TX 78759  
794-9994

**Fusion Data Systems**  
8920 Business Park Drive  
Austin, TX 78759  
794-9994

**FYI Inc.\***  
PO Box 26481  
Austin, TX 78755  
259-2839

**G Soft Programming\***  
2222 Western Trails  
Suite 106  
Austin, TX 78745  
441-8333

**Galileo Software, Inc.\***  
2410 Spring Wagon Lane  
Austin, TX 78228  
251-6974

**Gasco Associates**  
3321 Harpers Ferry Ln.  
Austin, TX 78745  
282-5292

**Girard Software\***  
604 Elmwood Place, #6  
Austin, TX 78705  
326-5943

**Glenrose Systems\***  
1301 South IH 35, Suite 109  
Austin, TX 78741  
448-1196

**Granite Software**  
7719 Wood Hollow Drive,  
Suite 260  
Austin, TX 78731  
346-2835

**GRM Software**  
3506 Eldorado Trl.  
Austin, TX 78739  
282-3077

**HAL Systems & Services, Inc.\***  
4425 MOPAC South, Suite 204  
Austin, TX 78735  
892-0972

**Haystack Laboratories, Inc.\***  
8920 Business Park Drive,  
Suite 270  
Austin, TX 78759  
343-2552

**Highland Lakes Software\***  
107 Hwy 620 South  
Austin, TX 78734  
266-2926

**Hill Country Software\***  
600 W. 10th Street, Ste. 640  
Austin, TX 78701  
472-2003

**Holt, Rhinehart and Winston, Inc\***  
1627 Woodland Avenue  
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314-6500

**Houston's Computer Software**  
314 Highland Mall Blvd  
#499  
Austin, TX 78752  
451-0136

**Hunt Earl R. and Associates Inc.**  
4813 Avenue F  
Austin, TX 78751  
452-2822

**IBM Corporation**  
11400 Burnet Road  
Austin, TX 78759  
832-0000

**Impact Resources**  
6306 Amberly Place  
Austin, TX 78759  
338-9505

**Impressions Software**  
4030 W. Braker Lane, Suite 350  
Austin, TX 78759  
794-8533

**Trik Inc.\***

101 W. 6th Street, #603  
Austin, TX 78701  
476-8935

**Trilogy Development\***

6034 W Courtyard Drive  
Suite 130  
Austin, TX 78730  
794-5900

**Trisoft/Cybersearch\***

1825 E. 38 1/2 Street  
Austin, TX 78722  
472-0744

**Tymlabs Corporation\***

811 Barton Springs Road  
Austin, TX 78704  
478-0611

**UniSQL, Inc**

9390 Research Boulevard  
Bldg 2 Suite 200  
Austin, TX 78759  
343-7297

**Uniworld Systems, Inc.\***

11612 Hidden Quail Drive  
Austin, TX 78758  
339-8407

**US Microlabs Inc.**

PO Box 140767  
Austin, TX 78714  
339-0001

**User Software Company Inc.**

2605 Tip Cove  
Austin, TX 78704  
447-5921

**Video Associates, Inc.**

4926 Spicewood Springs  
Austin, TX 78759  
346-5781

**Video Telecom Corp.\***

1901 West Braker Lane  
Austin, TX 78758  
314-2700

**Wasatech Educational Services**

4003 Sidehill Path  
Austin, TX 78731  
346-4114

**Wesson International, Inc.\***

500 S Capital of Texas Hwy., Suite 5-  
200  
Austin, TX 78746  
328-0100

**Westlake Data Corporation**

P.O. Box 1711  
Austin, TX 78767  
328-1041

**Windy Hill Software Company Inc.**

11629 River Oaks Trl  
Austin, TX 78753  
459-7460

**Workstation, Inc. (DBA MacPEAK Research)\***

2906 Thousand Oaks Drive  
Austin, TX 78746  
327-3211

**WSE Associates, Inc\***

5808 Balcones Drive,  
Suite 202  
Austin, TX 78731  
454-0679

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6836 Austin Center Boulevard  
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Austin, TX 78731  
343-5645

**XTI**

13706 Research Blvd.  
Austin, TX 78750  
258-1062

**XXCAL**

9111 Jollyville Road  
#211  
Austin, TX 78759  
343-8433

**Zycor Inc. (Landmark)\***

220 Foremost Drive  
Austin, TX 78745  
282-6699

**To be Added to the Directory Please contact:**

Dr. David V. Gibson or  
Cherie Long  
IC<sup>2</sup> Institute

The University of Texas at Austin

2815 San Gabriel

Austin, TX 78705

(512) 478-4081

(512) 499-0245 (fax)

Internet Address:

davidg@ICC.UTEXAS.edu

cheriel@tenet.edu

*\*designates Phase I and/or Phase II respondents*



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