

# L'Outsourcing

pour qui, pourquoi, quand, comment?

Conférence INPUT

4 Juin 1992

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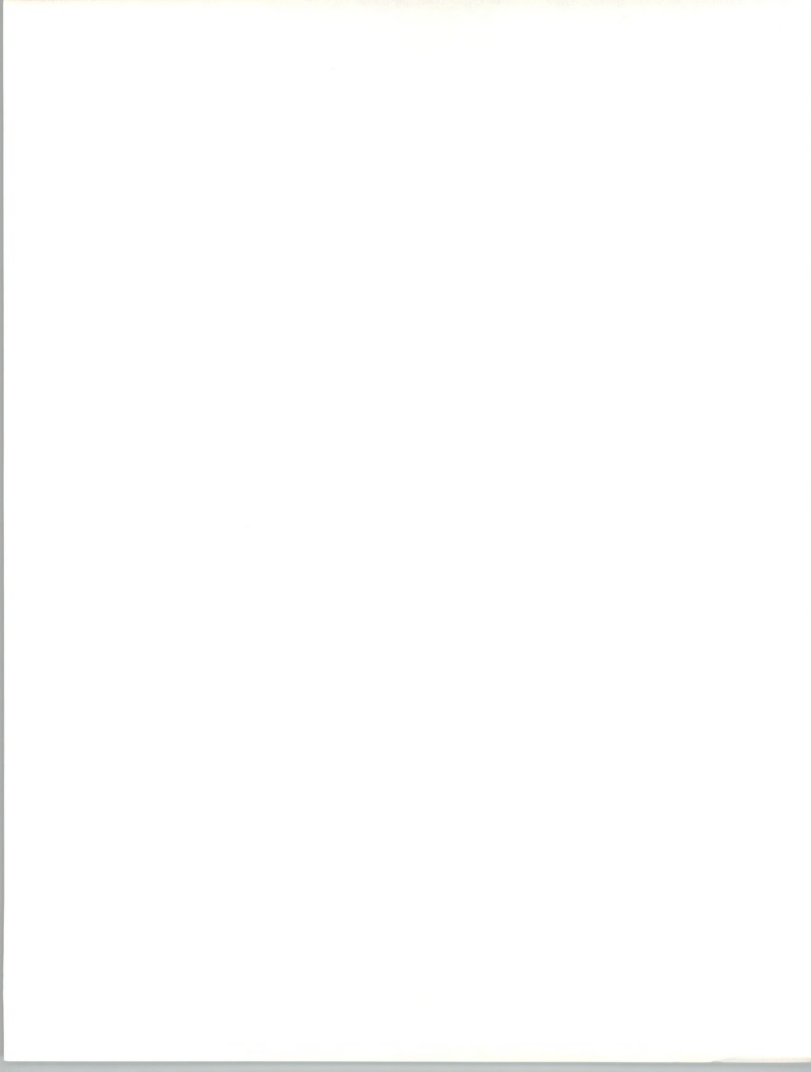
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**Outsourcing Information Systems  
Programme—Europe**  
(OEOSP)

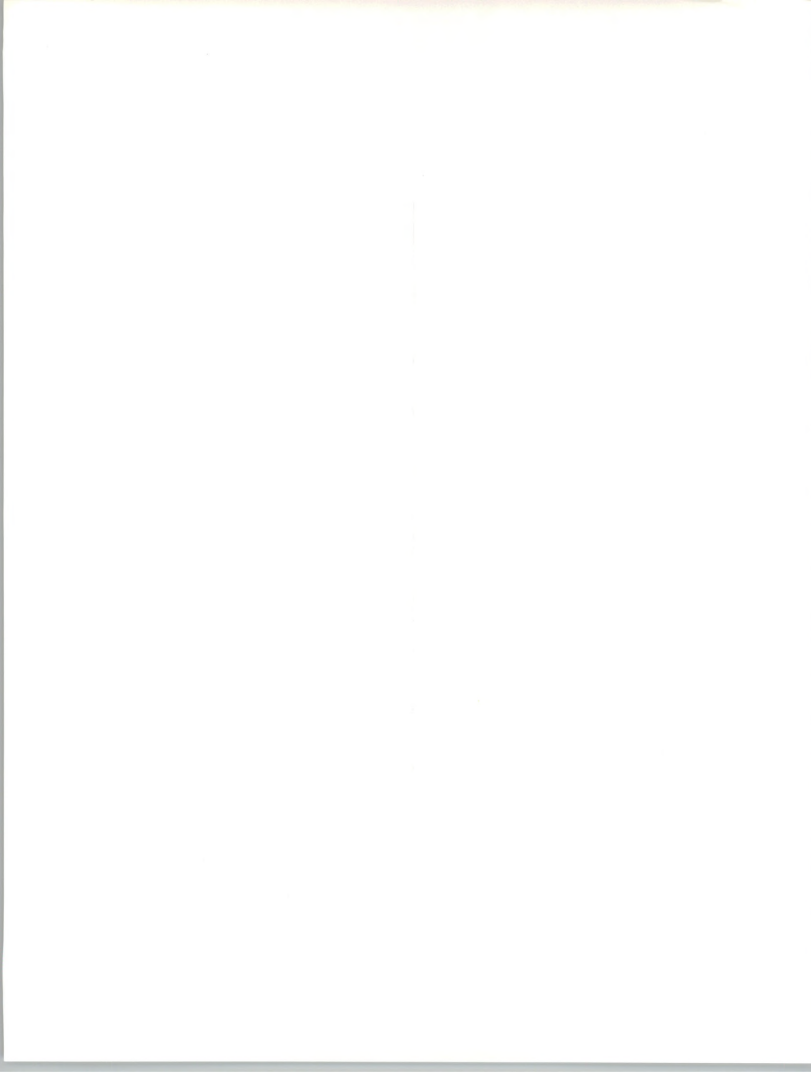
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# Services Industry Trends

E-IS-38

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# Services Industry Trends 1991-1996—Primary Forces

- The Economy
- The Market Size
- The Influence of Large Vendors
- Downsizing
- The Changing Buyer
- Outsourcing
- The Standards Process

E-IS-39

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Notes



# The Economy

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Notes



## Weak Economy

- Lingering recession delays decisions
- Information systems under tight control
- Information systems budgets—5% to 10% increase
- Vendor investment is slowed

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AIFRE 5/12-4

Notes



## IT User Expenditure Europe—Historical Growth

Category	'81 (\$B)	CAGR (%)	'91 (\$B)
Systems	25	9	60
Systems Software	1	28	12
Equipment Maint.	5	12	15
Services	9	20	58
Total	40	14	145

E-IS-40

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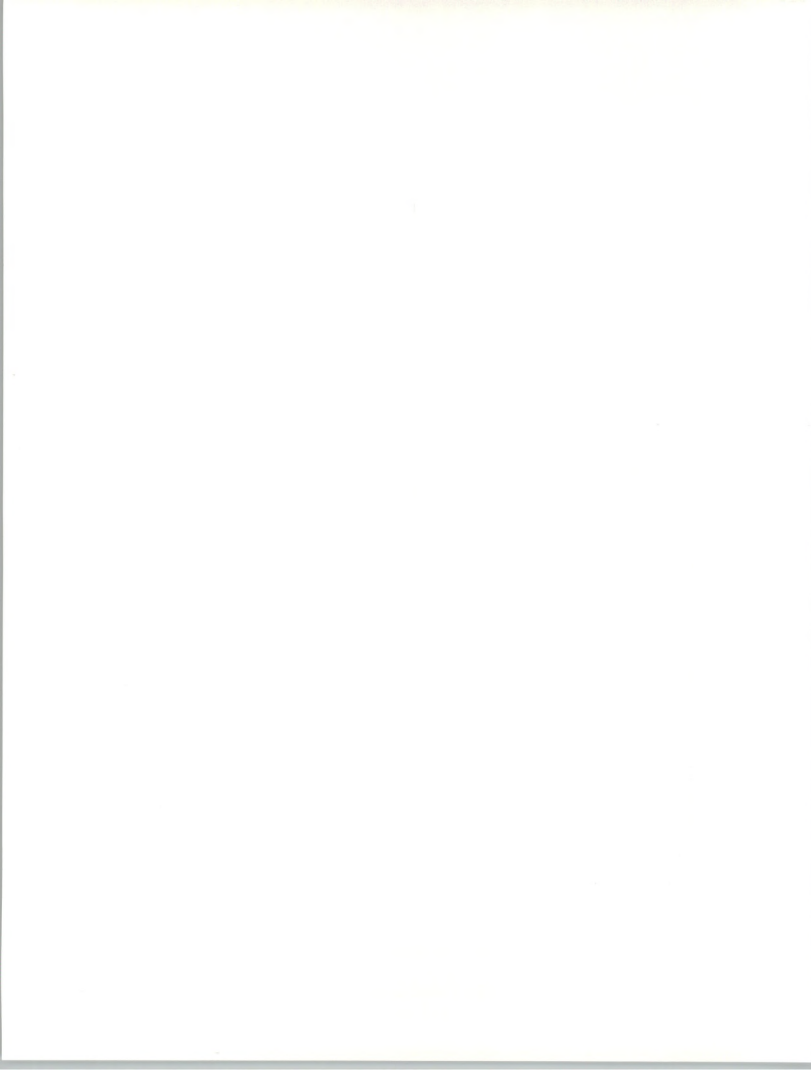
# The Market Size

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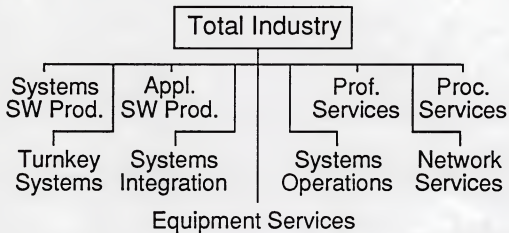
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# Information Services Industry Structure



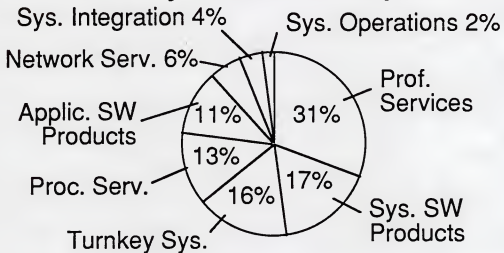
IS-2

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# Delivery Mode Analysis



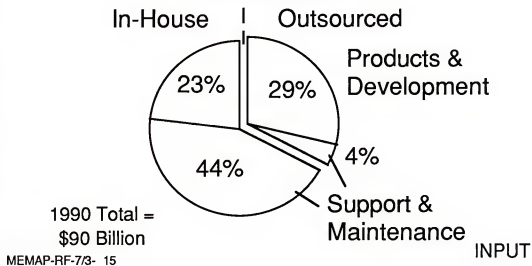
1991 Total Market Europe = \$77B INPUT

E-IS-41

Notes



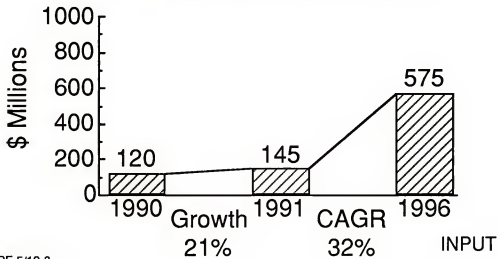
# European User Software Budgets



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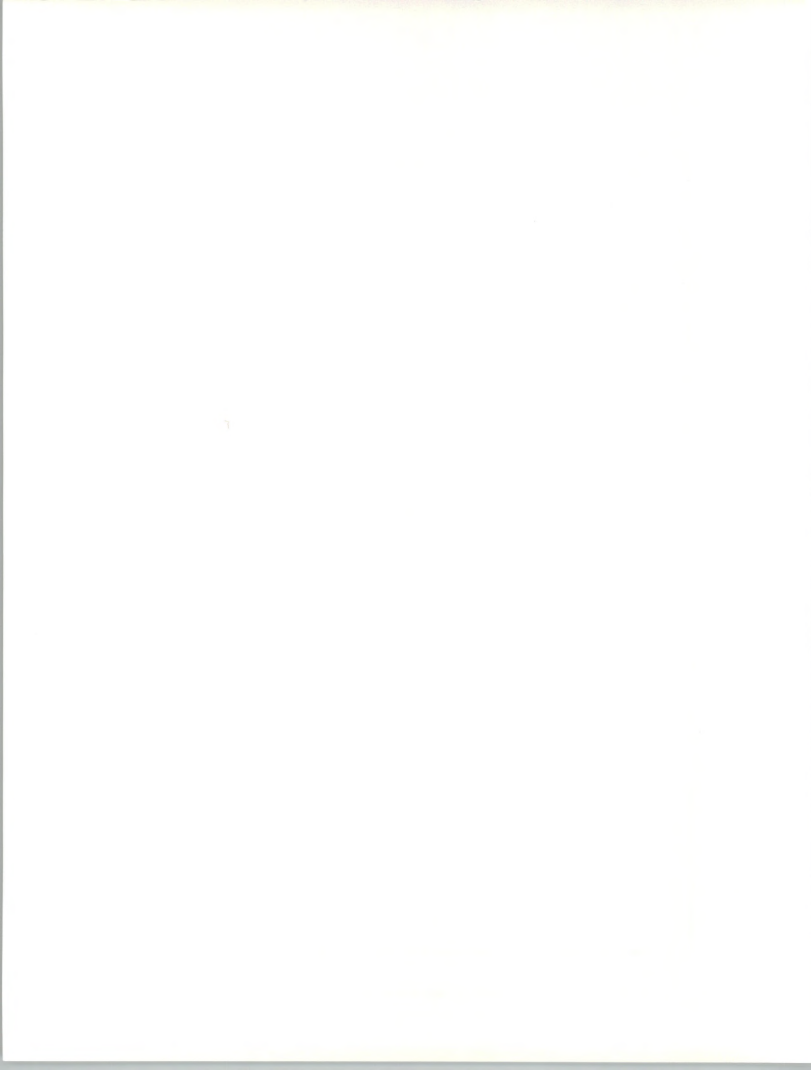


## Eastern Europe, 1991-1996 Software and Services



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# The Influence of Large Vendors

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## Increasing Influence of Large Vendors

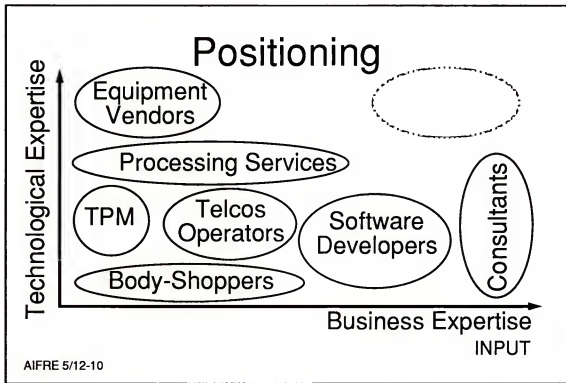
- Consolidation continues
- Market share creeping up
- Outsourcing favors larger vendors
- Slows technological change and adoption

IS-62

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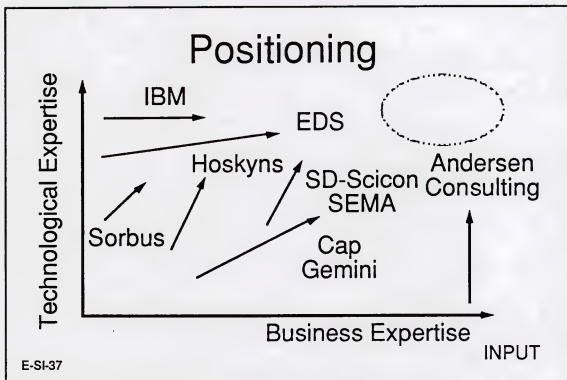
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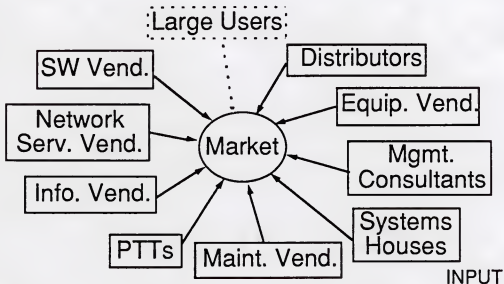




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# Increasing Competition



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# Downsizing

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## Downsizing What Is Its Meaning?

- Something new
- Something old
- Downsizing = Upsizing
- Downsizing = Smartsizing = Upsizing  
Rightsizing

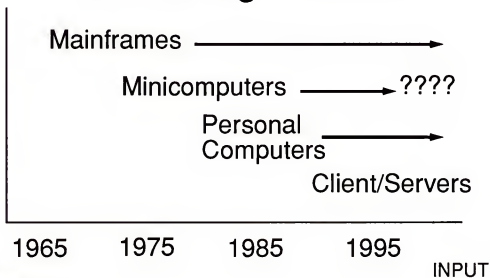
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# Downsizing Timeline



AIFRE 5/12-13

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## Downsizing What Are the Motivations?

- Lower costs
- Distribute data bases
- Improve productivity and return on investment
- Put the power in the hands of the users

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Notes



# The Changing Buyer

AIFRE 5/12-15

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Notes



## The Changing Buyer

- General manager becomes primary buyer
- IS becomes internal consultant
- Solutions versus technology

IS-64a

INPUT

Notes



## The Changing Buyer

- Decisions become larger—  
take longer
- The budget is  
decentralized—multiple buyers

IS-64b

Notes



# Revolutions or Evolutions?

- Re-engineering
  - Organization: All or parts
  - IS Organization

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IS-95

Notes



# Outsourcing

OU-43

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Notes

107/91

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Outsourcing is the  
contracting of information  
systems processes to  
external vendors.

OU-6a

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Notes



## “Outsourcing” vs. Buying Services

- Greater commitment on part of buyer
- “Partnership”
- Responsibility/risk for vendors

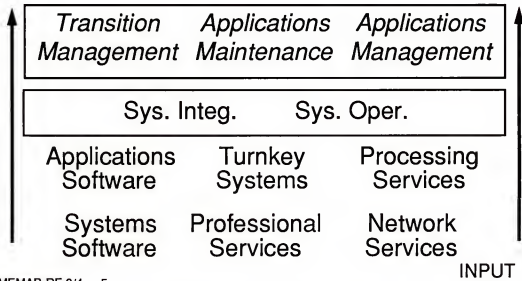
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OU-11

Notes



## Product and Service Trends



Notes



# The Standards Process

AIFRE 5/12-16

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Notes



# The Systems Industry— Past

Operating environments protected  
core systems prices

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IS- 92

Notes



# The Systems Industry— Now Open Systems

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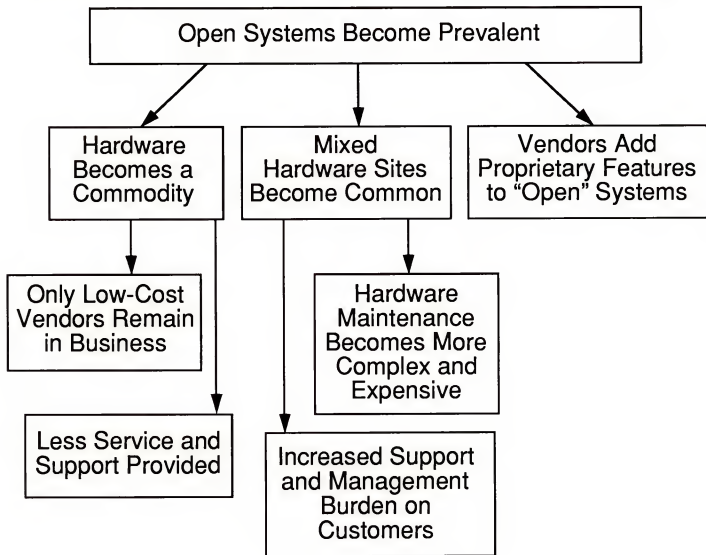
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IS-93

Notes



# Open Systems: Market-Related Problems









# Overview of Outsourcing Market in Europe

E-OU-28

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Notes



Systems Operations, Europe

## Key Trends

- Users' outsourcing becomes more complete
- New types of service emerging
- Vendors seek increased profitability

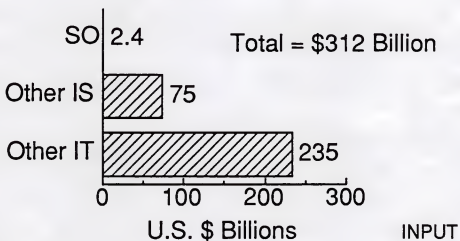
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Notes



# Total IT Expenditure Europe, 1991



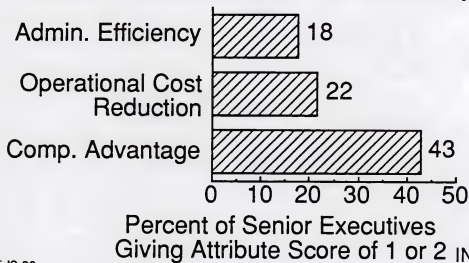
E-IS-35

Notes



Europe

## Major Challenges for IS Depts.



E-IS-36

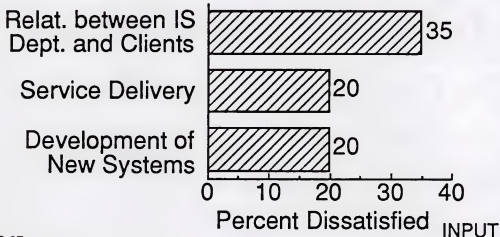
Notes

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Europe

## Major Challenges for IS Depts.



E-IS-37

Notes

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Outsourcing, Europe

## Identification of Prospects

Low

Level of In-house  
IS Capability

Changing Co. Struct.	Remote Subsid.
Changing Business Focus	New Acquisition
Stable Well-Focused Org.	Change of CEO

Quality of Relat. Between IS & Clients

High

Low

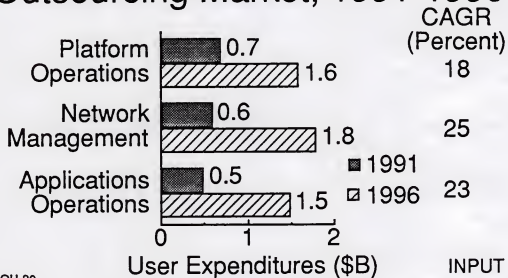
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Notes



## Europe Outsourcing Market, 1991-1996



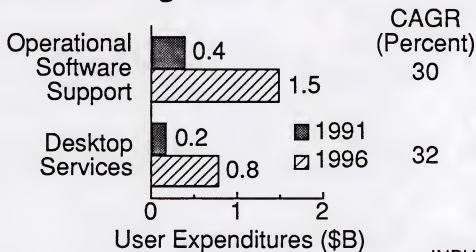
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Notes



Europe

## Outsourcing Market, 1991-1996



E-OU-31

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Notes



Outsourcing, Europe

## Principal Reasons for Platform Operations

Factor	Degree of Imp.
Easier planning of IS costs	High
Complexity of technology	High
Difficulty in recruiting staff	Med.
Change in technology used	Med.

E-OU-32

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Notes



Platform Operations, Europe

## Nature of Renewals

- Existing service levels crucial
- Users attempt to drive down costs
- Users more susceptible to total solution

E-SO-50a

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Notes



## Network Management Outsourcing Drivers

- Increasing reliance on the network—globalisation of business
- Increasing complexity of networking technology
- Increasing volatility of the public network infrastructure

E-OU-33

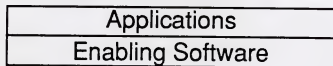
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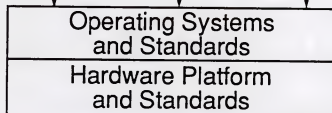


# Uncoupling Applications from Infrastructure

Dynamic  
Business  
Environment



'Static'  
Supporting  
Platform



E-AD-16

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Notes



## Operational Software Support Outsourcing Drivers

- Dependence on aging application systems
- Resource management difficulties
- Software staff discontent

E-OU-34

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Notes



## Operational Software Support Outsourcing Drivers

- New business demands on staff
- Holding action during transition
- User discontent with quality of service

E-OU-35

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Notes



## Operational Software Support Conclusions

- Untapped market opportunity
- Total user spend ~ \$44 billion
- Less than 1% is outsourced
- Primary need—IS management skills

E-OU-36

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Notes



Application Operations, Europe

## Reasons for Adoption

Factor	Degree of Imp.
Making IS relate to business needs	High
Making IS more manageable	High
Easier planning of IS costs	High
Need to reduce IS costs	High

E-AD-17

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Notes



Application Operations, Europe

## Vendor Selection Criteria

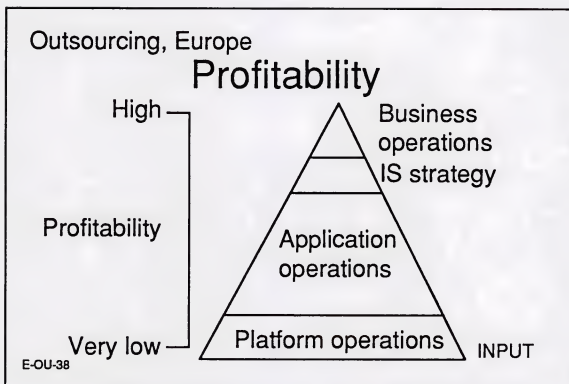
Factor	Rating
Industry knowledge	High
Business consultancy skills	High
Development capability	High
Vendor independence	High

E-AD-18

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Notes





Notes



Outsourcing, Europe

Leading Vendors, 1990

Rank	Company	Est. Rev. (\$M)
1	CGS/Hoskyns	145
2	EDS	132
3	AT&T Istel	78
4	GSI	64
5	SD-Scicon	59

E-OU-39

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Notes



# Outsourcing Product Lines Hoskyns

- Midrange
- Mainframe
- Application management
- Desktop services

E-OU-40

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Notes



AT&T Istel

## Breakdown by Service Type Outsourcing Customer Base

Service	(%) of Contracts
FM and efficiency mgmt.	55
Service management	35
Change management	5
Information systems mgmt.	5

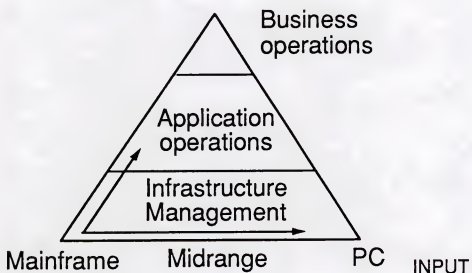
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# Outsourcing Trends



E-OU-42

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# Outsourcing Desktop Services In Europe

E-OU-2

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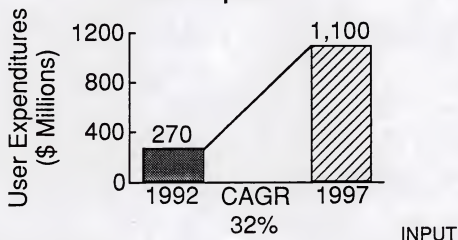
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## Desktop Services Market Europe



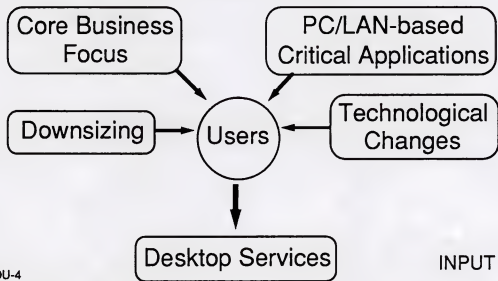
E-OU-3

Notes



Desktop Services, Europe

## Driving Forces



Notes



Desktop Services, Europe

## The Decision Process

Size of Organization	In-House Capability Level	Source of decision to outsource
Large organizations	High	Senior executives
Medium-sized organizations	Low	IS management

E-OU-5

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Notes



Desktop Services, Europe

## Major Country Markets, 1992

Country	1992 Revenues (\$ Millions)
United Kingdom	120
Germany	40
France	30
Netherlands	25

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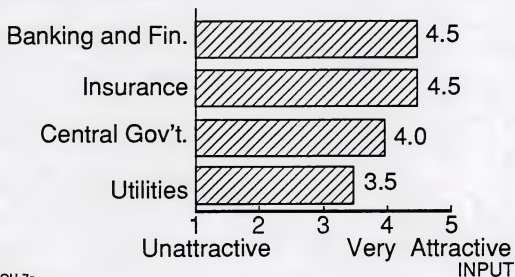
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Notes



## Desktop Services, Europe

### Attractiveness of Industry Sectors

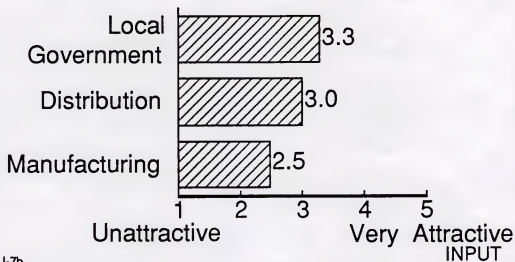


E-OU-7a

Notes



## Desktop Services, Europe Attractiveness of Industry Sectors



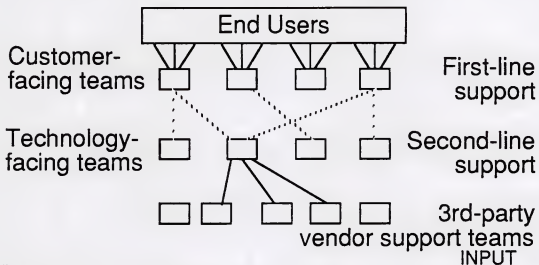
E-OU-7b

Notes



## Desktop Services, Europe

# Delivery of Help Desk Services



E-OU-8

Notes



Desktop Services, Europe

## Pricing Mechanisms

- Cost of on-site support plus mark-up
- Monthly usage of remote help desk
- Volume discounts

E-OU-9

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Notes



## ICG Service Offerings

- Help Desk
- International account management
- Consulting services
- PC integration services

E-OU-22

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Notes



## Delivery Capability: ICG

Service Element	Level of Capability
Purchasing consulting	High
Equipment purchase	High
Equipment maintenance	High
LAN/equipment installation	High
LAN management	High

E-OU-11a

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Notes



## Delivery Capability: ICG

Service Element	Level of Capability
Help desk services - Systems software - Applications SW products	High High
Second-line technical support	High

E-OU-11b

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Notes



# ICG: Strengths and Weaknesses

Strengths	Weaknesses
Pan-European coverage	Lack industry-specific expertise
Equipment supply	Lack mainframe expertise
Breadth and depth of support capability	SO customer base

E-OU-23

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Notes



## Service Offering: Sema Group

- Based on LAN expertise
- Support limited application range
- Prefer remote help desk

E-OU-24

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Notes



Desktop Services, Europe

## Delivery Capability: Sema Group

Service Element	Level of Cap.
Purchasing consultancy	Medium
Equipment purchase	Medium*
Equipment maintenance	Medium-High*
LAN/equipment installation	High
LAN management	High

\*Via partner

E-OU-25

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Notes



Desktop Services, Europe

## Delivery Capability: Sema Group

Service Element	Level of Cap.
Help desk services	High
-Systems software	Medium
-Applications software products	
Second-line technical support	High

E-OU-26

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## Strengths and Weaknesses: Sema Group

Strengths	Weaknesses
LAN skills Willingness to support ASPs	Lack breadth of PC application support capability

E-OU-27

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Notes



Desktop Services, Europe

## Dealer/Distributor Strategies

- Develop pan-European capability
- One-stop shopping
- Partnerships for proprietary capability
- Major opportunity to enter high-margin services business
- Targeting system development

E-OU-18

INPUT

Notes



Desktop Services, Europe

## Strategies: Professional Services Vendors

- Only targeting desktop services as part of wider offering
- Concentrating on network implementation and management

E-OU-16

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Notes



Desktop Services, Europe

## Key Trends

- Downsizing producing substantial market growth
- Could become dominant form of infrastructure management

E-OU-20b

INPUT

Notes



Desktop Services, Europe

## Key Trends

- Outsourcing ITTs increasingly request desktop services
- Desktop services also emerging as standalone service

E-OU-20a

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Notes



Desktop Services, Europe

## Vendor Challenges

- Independence of supply
- Full-service capability
- Breadth of software product support capability
- Up-to-date technical skills
- Pan-European coverage

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E-OU-21

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