

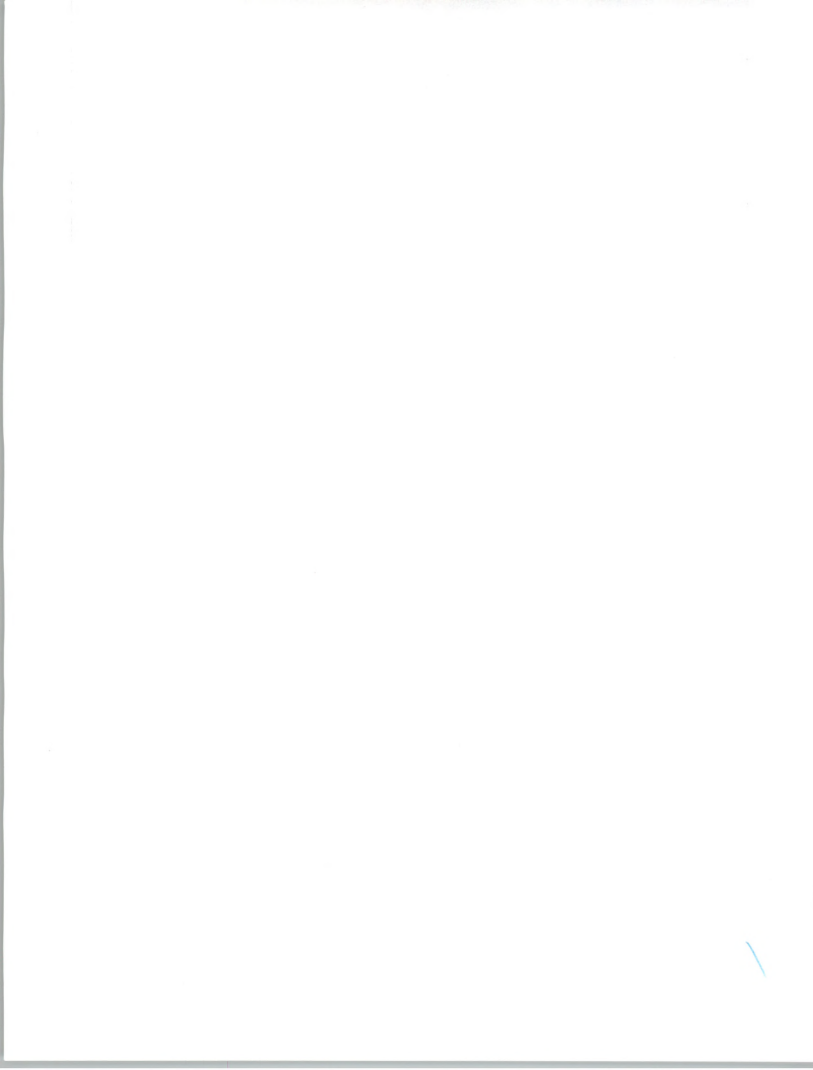
Outsourcing:
Quelle Dynamique de
Croissance Sur le Marché?

Outsourcing:
Market Trends

Conférence INPUT
Paris - 19 Octobre 1993

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Prepared by
INPUT
24, avenue du Recteur
Poincaré
75016 Paris
France

***Outsourcing: Quelle Dynamique de Croissance
Sur le Marché?***

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Outsourcing: Quelle Dynamique de Croissance Sur le Marché?

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L' "Outsourcing" Contours actuels et futurs du marché

Sylvie Bénech
Directeur d'INPUT

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Notes

L' Outsourcing

- Evolution de l'outsourcing
- Nouvelles niches

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**L' Outsourcing
consiste à recourir à un prestataire
externe pour opérer tout ou partie
d'un système d'information**

IPS 1985 - 4

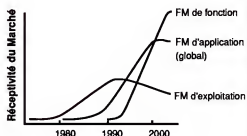
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Les Différentes Phases de L' Outsourcing

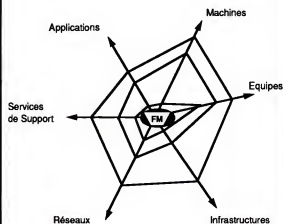


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L' Outsourcing: Un Concept à "Géométrie Variable"



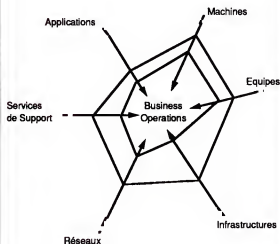
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Outsourcing Demain Vers le "Business Operations" (FM de Fonction)

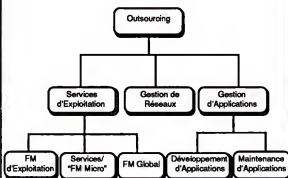


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Les Formes de L' Outsourcing Selon INPUT



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Les Nouvelles Niches

- Le "FM de transition" - Transition management
- Les "Services/FM micro" - Desktop services
- Le "FM de fonction" - Business operations

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Le FM de Transition

- Prestataire = vecteur du changement
- Transition complexe
- Transition longue
- Maintenir en parallèle deux environnements

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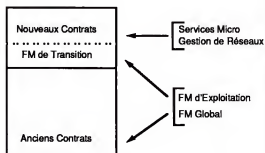
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Nature des Contrats D'Outsourcing 1993



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Les Services Micros

Caractéristiques des Prestations

Types de Services	Nature des Prestations
Support d'intégration	Conseil/organisation/choix technologiques Conception d'architecture, développement, migration
Support Connectivité et Accès Données	Sécurité Réseau

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Notes

Les Services Micros

Caractéristiques des Prestations

Types de Services	Nature des Prestations
Support Logistique	Financement Installation Maintenance Gestion de Parcs
Support Utilisateur	Hotline Formation

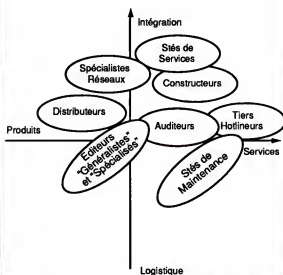
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Les Services Micros

Positionnement des Catégories de Fournisseurs sur le Marché



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Notes

Business Operations

Définition du "FM de Fonction"

Prise en charge par un prestataire externe d'une fonction essentielle de l'entreprise et du système d'information correspondant

- Système de Facturation
- Service Client
- Gestion des documents
- Traitement des réclamations

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Business Operations - "FM de Fonction"

Caractéristiques des fonctions à privilégier

- Communes à plusieurs entreprises
- A dominante humaine
- A forte teneur technologique
- Activité fluctuante

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Notes

Conclusion

Stratégies d'Outsourcing

Actuelles

- Economies
- Amélioration du service

Nouvelles

- Vecteur du changement
- Stratégie d'entreprise
- Transition

Notes

Outsourcing Market Trends

Sylvie Bénech
INPUT Director

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Outsourcing Current and future market outline

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Notes

Outsourcing

- Outsourcing evolution
- New niches

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**Outsourcing
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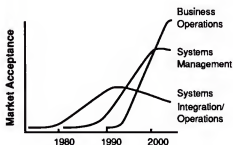
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Outsourcing Market Waves

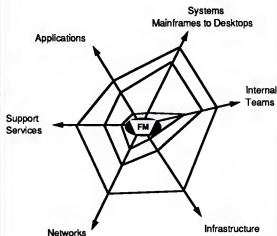


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Outsourcing: A Swing-Wing Concept

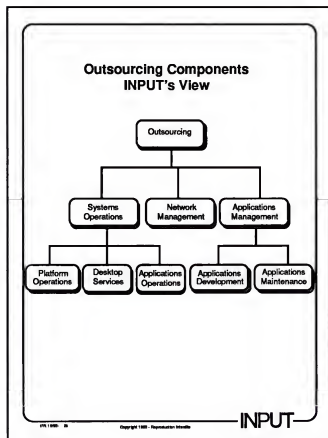
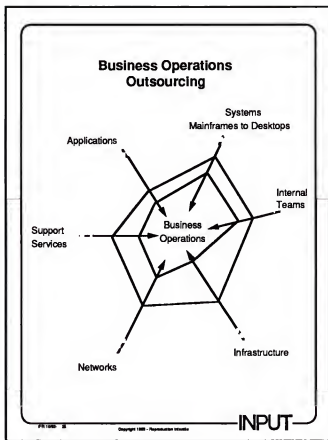


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New Niches

- Transition management
- Desktop services
- Business operations

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Transition Management

- Requires outsourcer as agent of change
- Transition difficult to accomplish
- Transition takes time
- Dual operational environments required

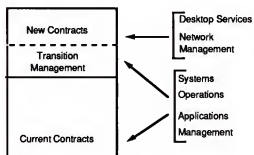
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Outsourcing Contracts 1993 Analysis



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Desktop Services

Services Offerings

Integration Services	Consultancy/Organisational Audit Purchase Advisory
Network Support	Security, LAN Management
Logistic Resource Management	Financial Services Installation Maintenance Fleet Management
End-User Support	Help Desk User Training

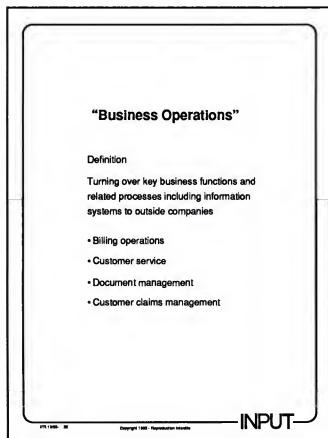
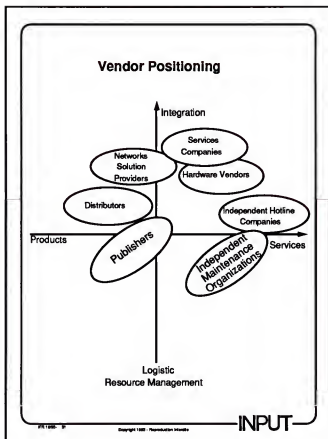
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Business Operations Outsourcing

Key candidates characteristics

- Labor-intensive
- High technology content
- Common to client's industry
- Periodic peak processing required

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Conclusions

Outsourcing Strategies

Current

- Economic strategies
- Service enhancement

New

- Change agent
- Business strategy

- Transition

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Clients make informed decisions more quickly and economically by using INPUT's services. Since 1974, information technology (IT) users and vendors throughout the world have relied on INPUT for data, research, objective analysis and insightful opinions to prepare their plans, market assessments and business directions, particularly in computer software and services.

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SUBSCRIPTION SERVICES

- **Information Services Markets**
 - Worldwide and country data
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- **Information Services Vendor Profiles and Analysis**
- **EDI/Electronic Commerce**
- **U.S. Federal Government IT Markets**
- **IT Customer Services Directions**
- **Interactive Communications Services**
- **Multimedia Opportunities**

SERVICE FEATURES

Research-based reports on trends, etc.
(Over 100 in-depth reports a year)
Frequent bulletins on events, issues, etc.
5-year market forecasts
Competitive analysis
Access to experienced consultants
Immediate answers to questions

DATABASES

- **Software and Services Market Forecasts**
- **Software and Services Vendors**
- **U.S. Federal Government**
 - Procurement Plans (PAR)
 - Forecasts
 - Awards (FAIT)
- **Commercial Application LEADS**

CUSTOM PROJECTS

For Vendors—analyse:

- **Market strategies**
- **Product/service opportunities**
- **Customer satisfaction levels**
- **Competitive position**
- **Acquisition targets**

For Buyers—evaluate:

- **Specific vendors**
- **Outsourcing options**
- **Market opportunities**
- **Systems plans**
- **Peer position**

OTHER SERVICES

Presentations to user groups, planning meetings, etc.

Acquisition/partnership searches

Newsletters

INPUT WORLDWIDE

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D-35428 Langgöns-
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Germany
Tel. +49 (0) 6447-7229
Fax +49 (0) 6447-7327

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London W1X 7FB
England
Tel. +44 (0) 71 493-9335
Fax +44 (0) 71 629-0179

New York

400 Frank W. Burr Blvd.
Teaneck, NJ 07666
U.S.A.
Tel. 1 (201) 801-0050
Fax 1 (201) 801-0441

Paris

24, avenue du Recteur
Poincaré
75016 Paris
France
Tel. +33 (1) 46 47 65 65
Fax +33 (1) 46 47 69 50

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1881 Landings Drive
Mountain View
CA 94043-0848
U.S.A.
Tel. 1 (415) 961-3300
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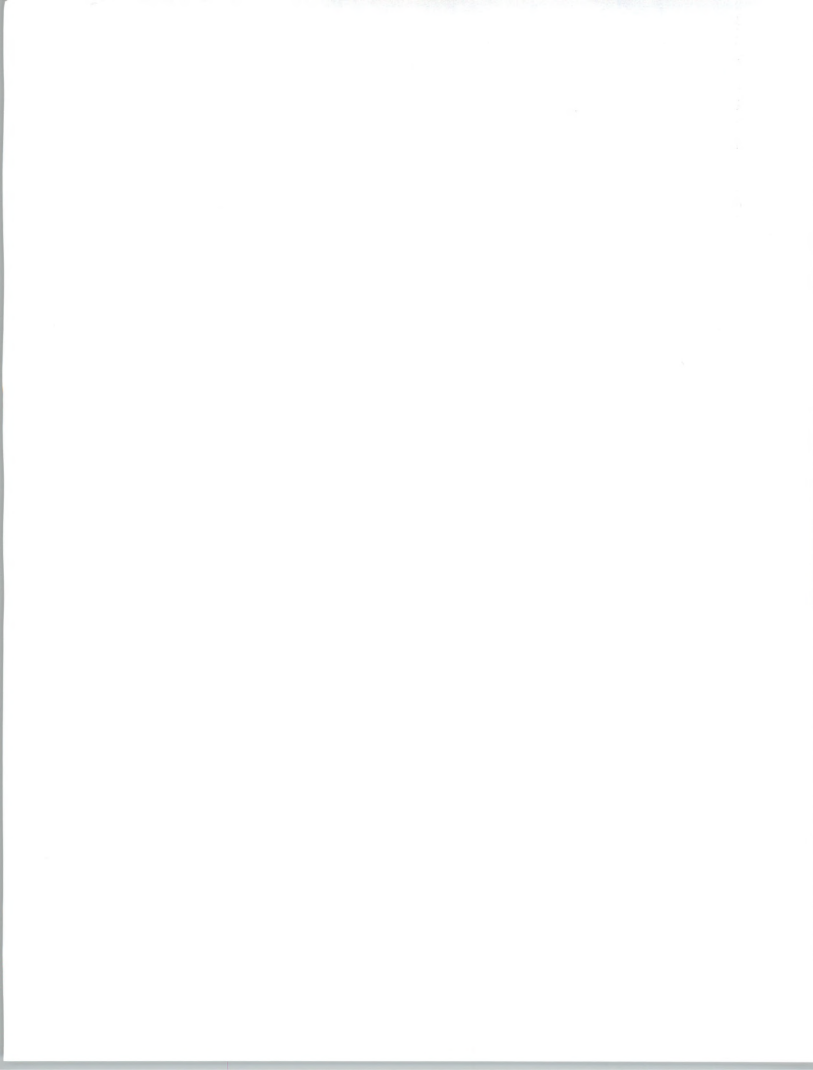
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Kanda Sakuma-cho
Chiyoda-ku, Tokyo 101
Japan
Tel. +81 3 3864-0531
Fax +81 3 3864-4114

Washington, D.C.

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Suite 560
Vienna, VA 22182
U.S.A.
Tel. 1 (703) 847-6870
Fax 1 (703) 847-6872

Outsourcing: Quelle Dynamique de Croissance Sur le Marché?



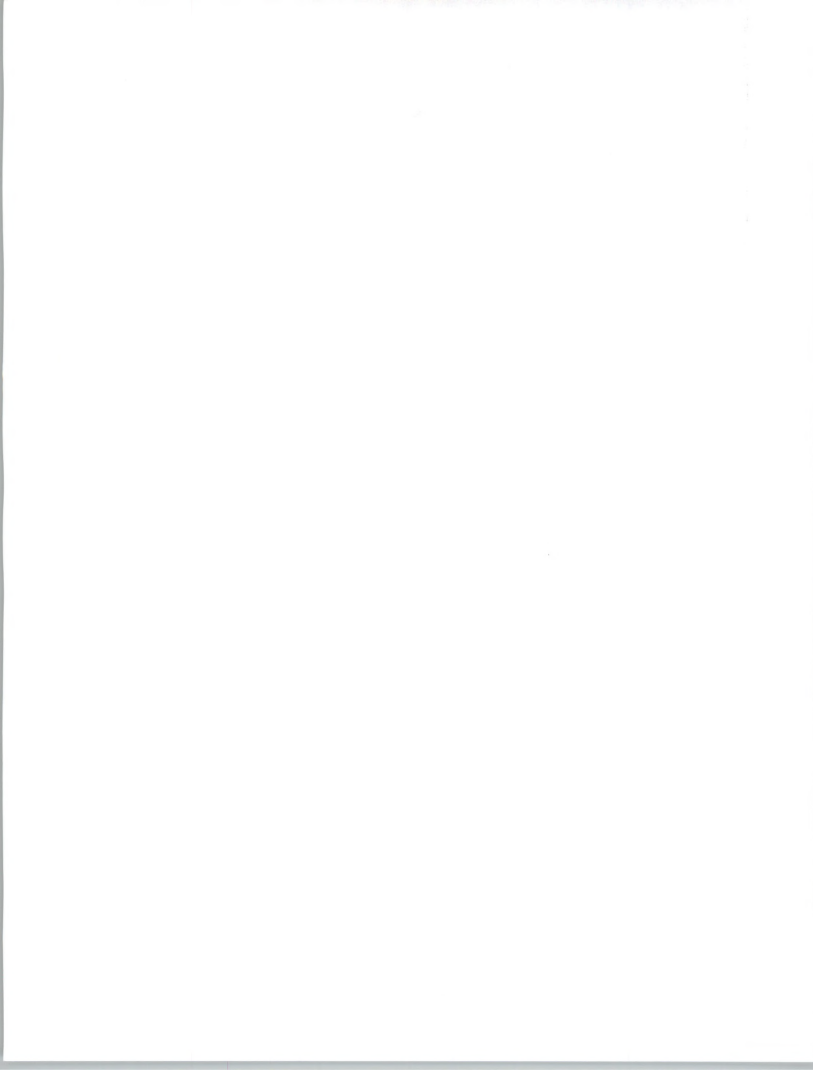
L' "Outsourcing"
Contours actuels et futurs du marché

Sylvie Bénech
Directeur d'INPUT

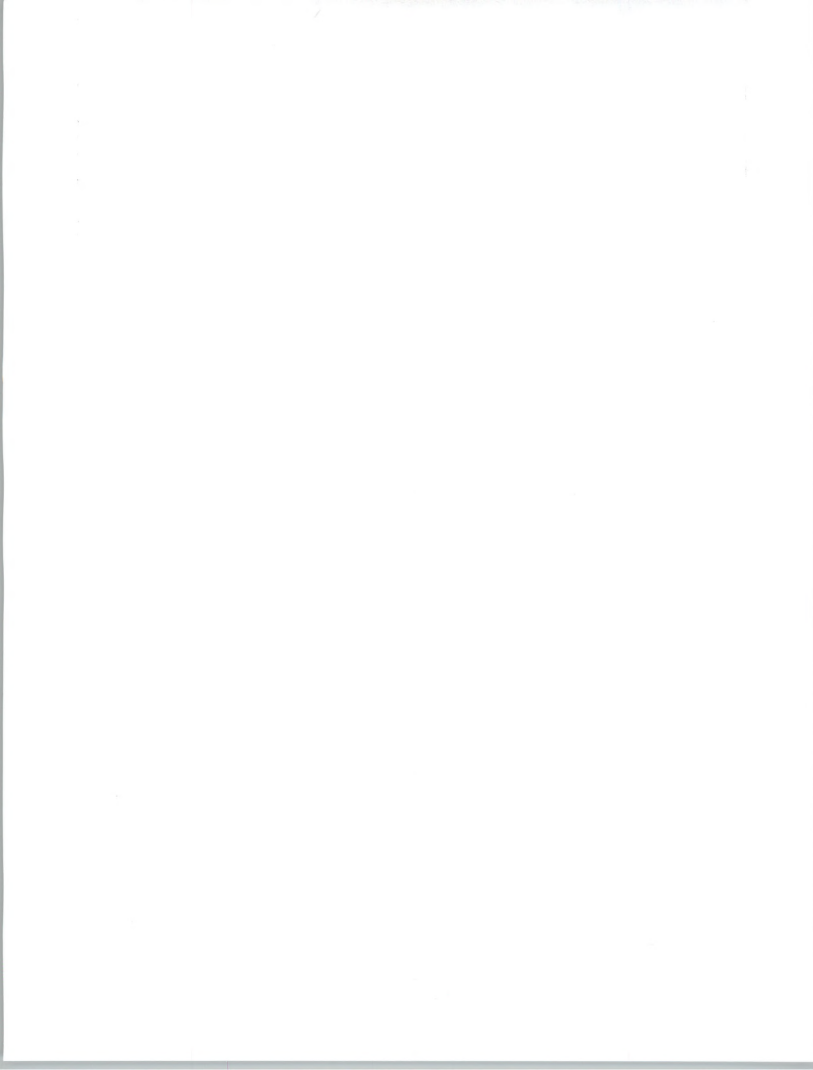


L' Outsourcing

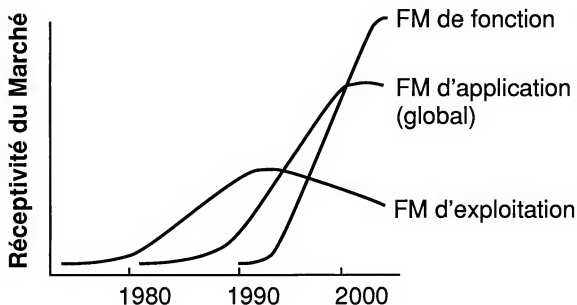
- Evolution de l'outsourcing
- Nouvelles niches

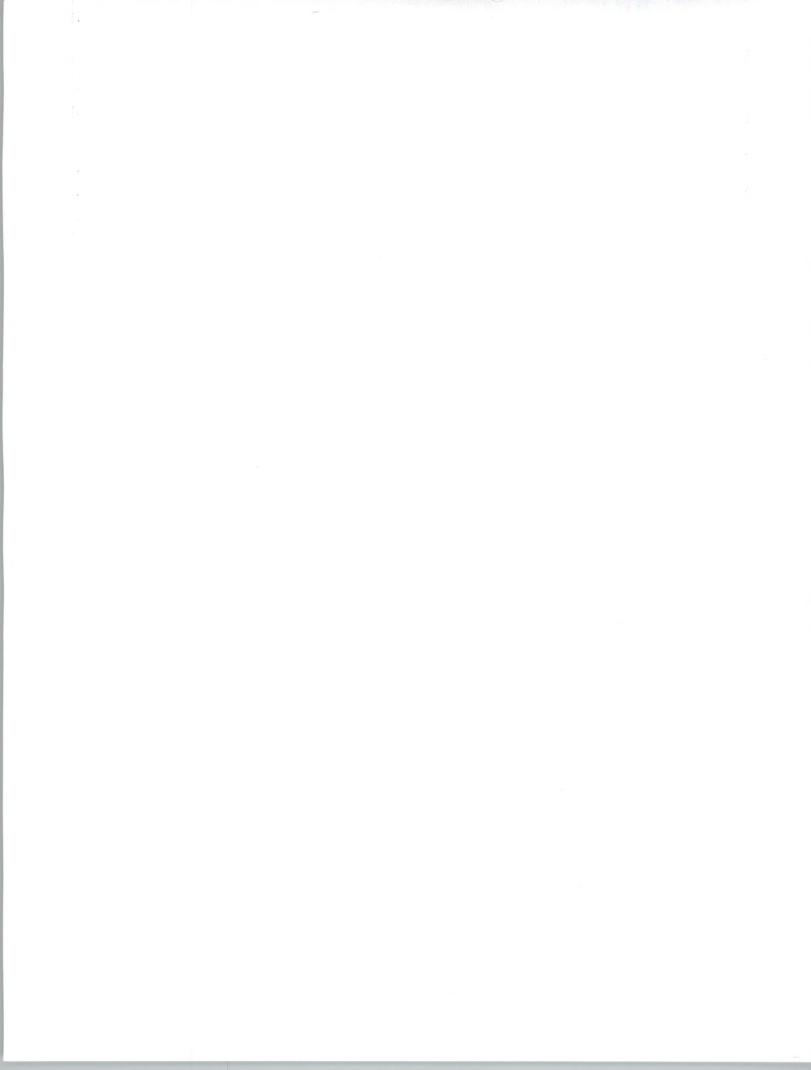


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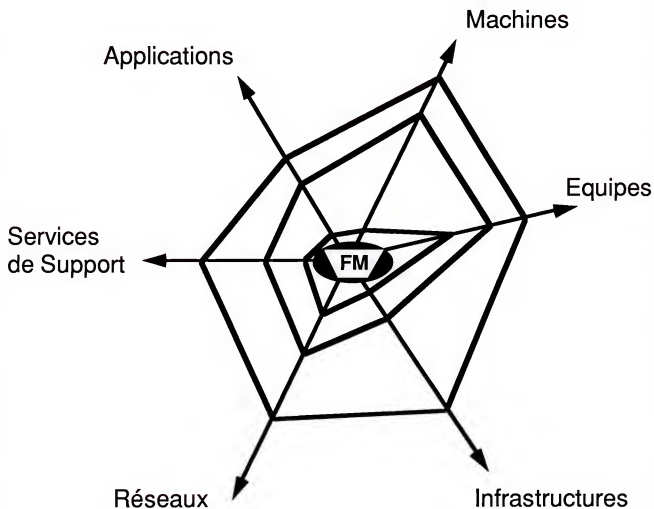


Les Différentes Phases de L' Outsourcing



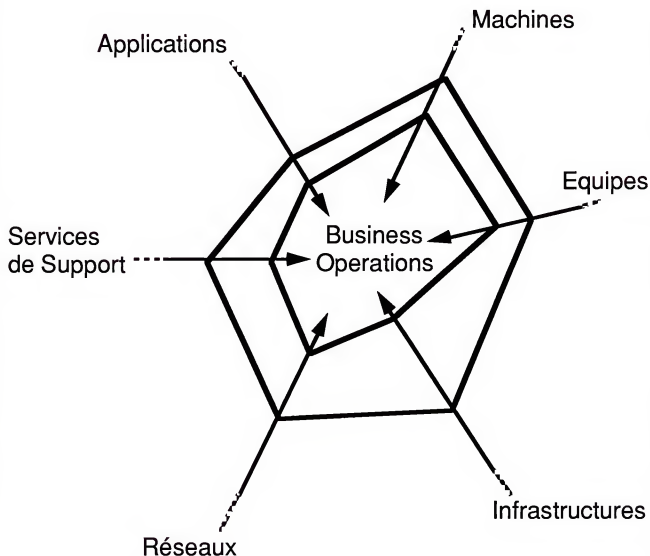


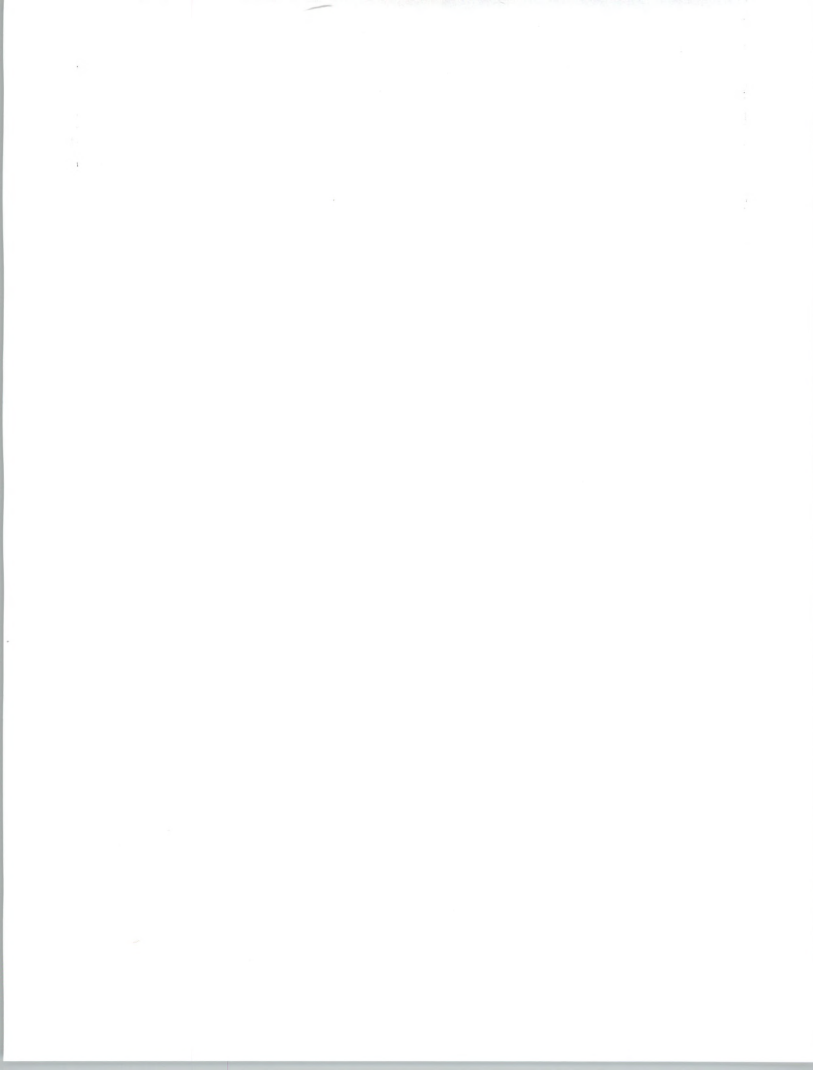
L' Outsourcing: Un Concept à "Géométrie Variable"



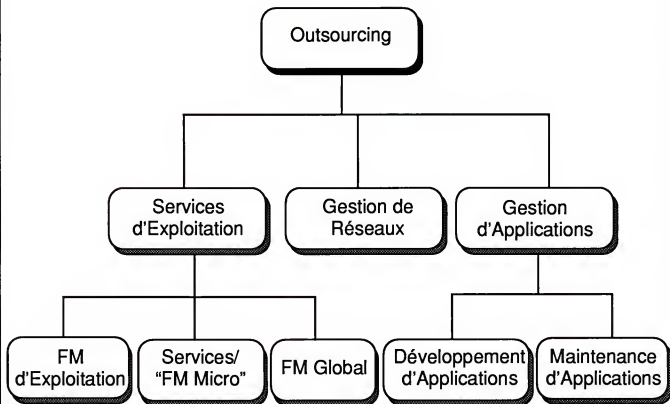


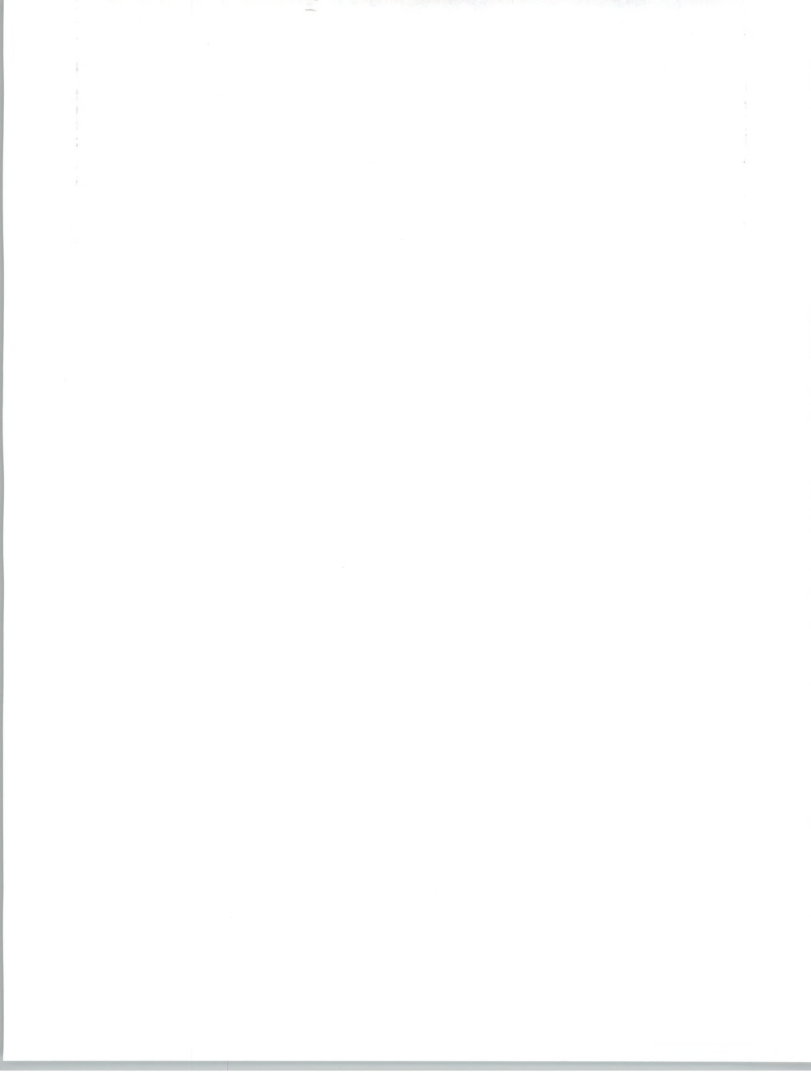
Outsourcing Demain Vers le "Business Operations" (FM de Fonction)





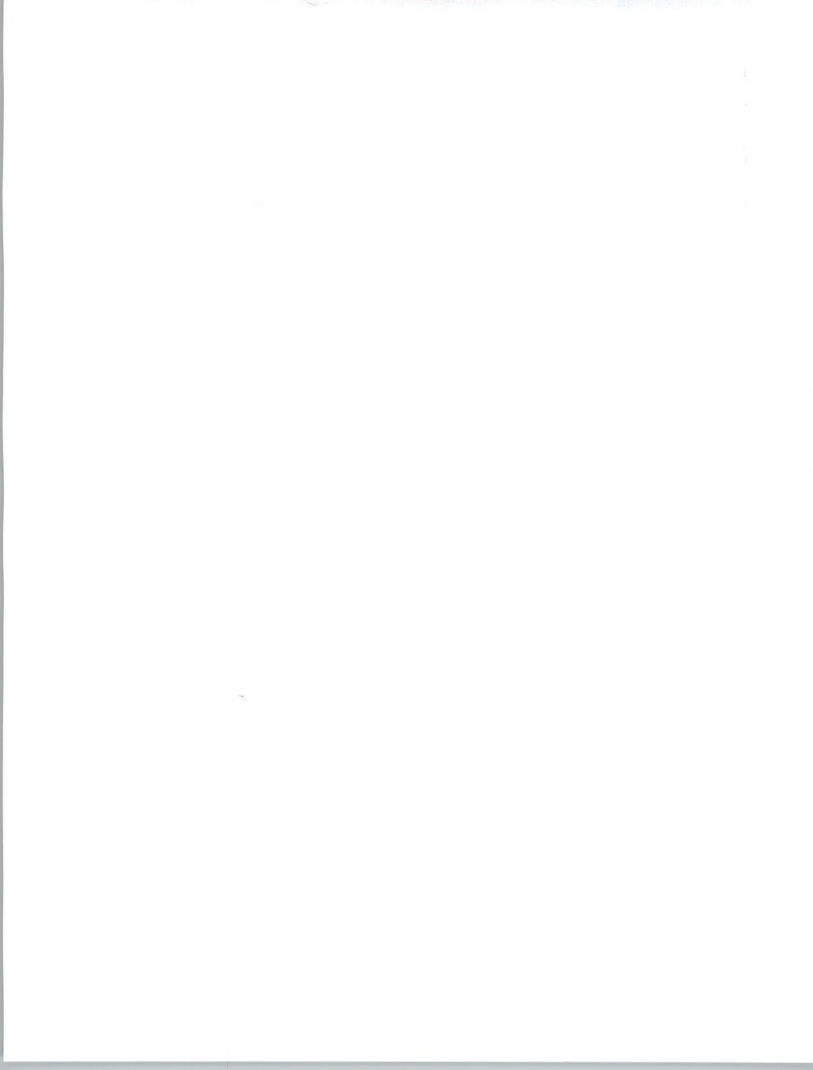
Les Formes de L' Outsourcing Selon INPUT





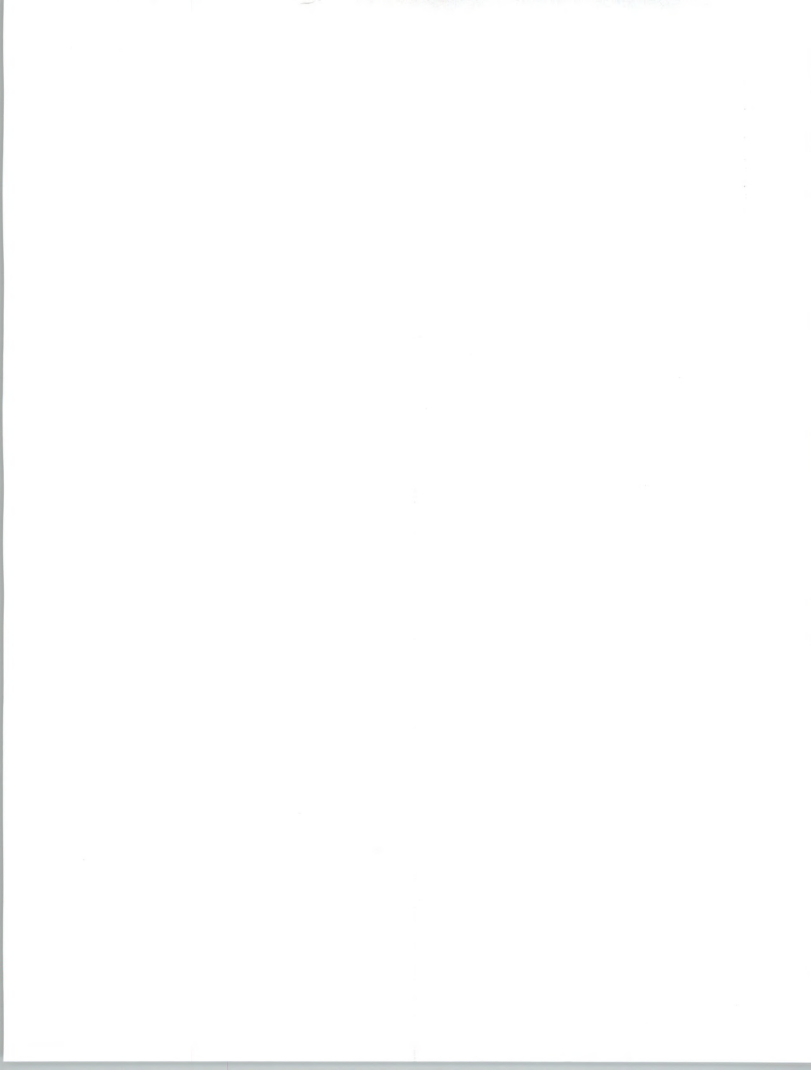
Les Nouvelles Niches

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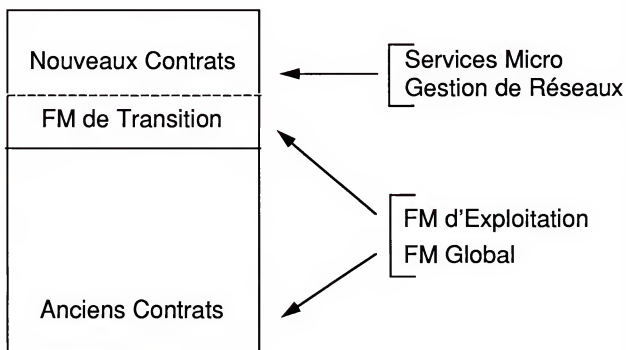


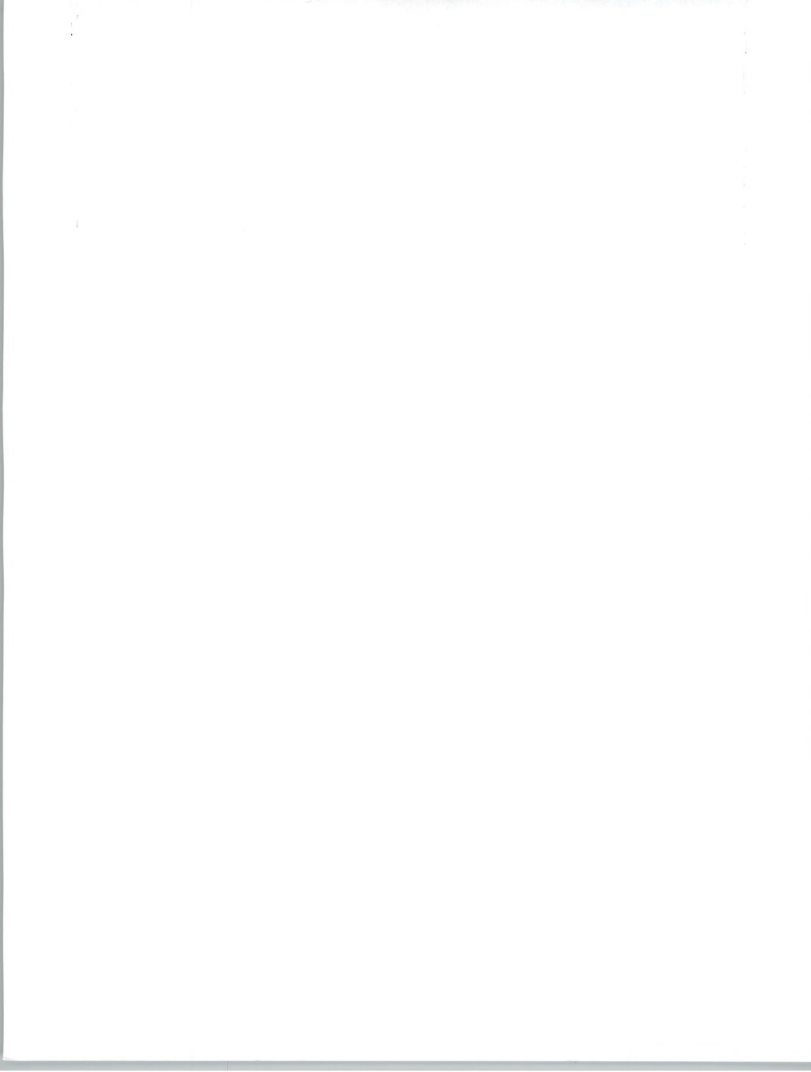
Le FM de Transition

- Prestataire = vecteur du changement
- Transition complexe
- Transition longue
- Maintenir en parallèle deux environnements



Nature des Contrats D'Outsourcing 1993

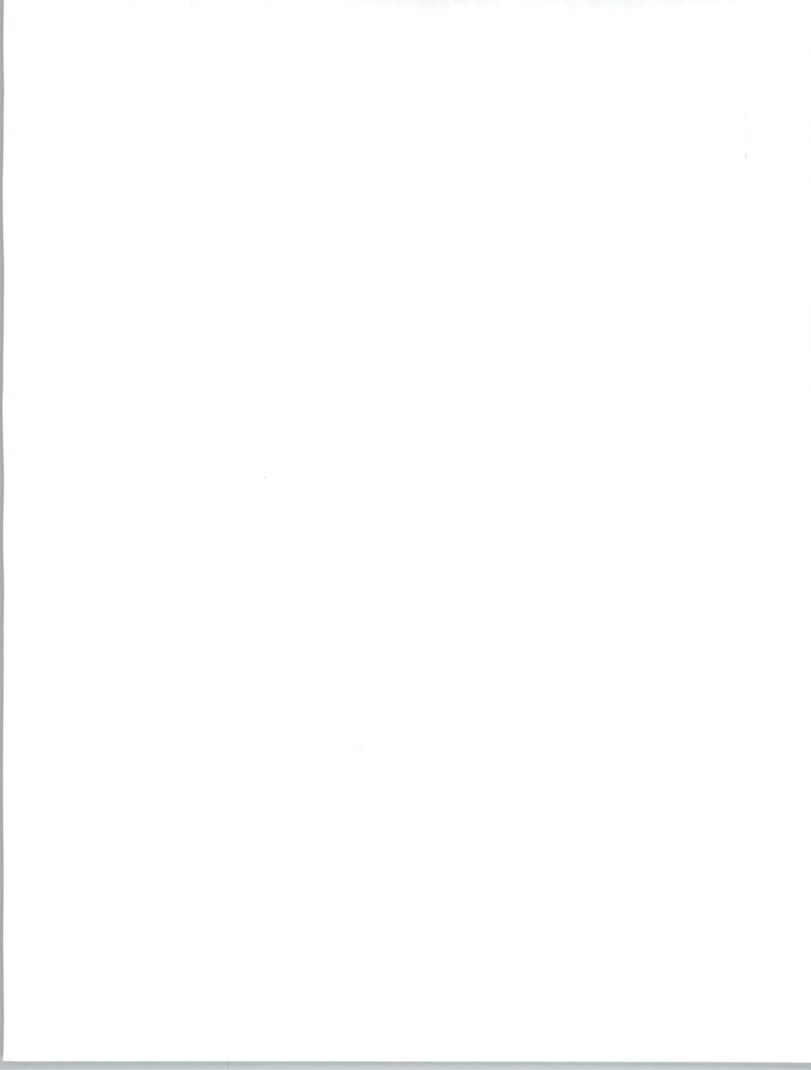




Les Services Micros

Caractéristiques des Prestations

Types de Services	Nature des Prestations
Support d'Intégration	Conseil/organisation/choix technologiques Conception d'architecture, développement, migration
Support Connectivité et Accès Données	Sécurité Réseau



Les Services Micros

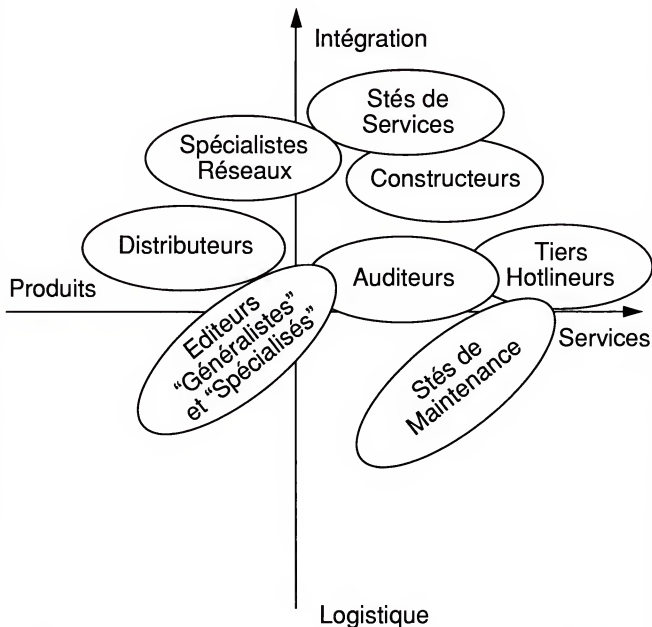
Caractéristiques des Prestations

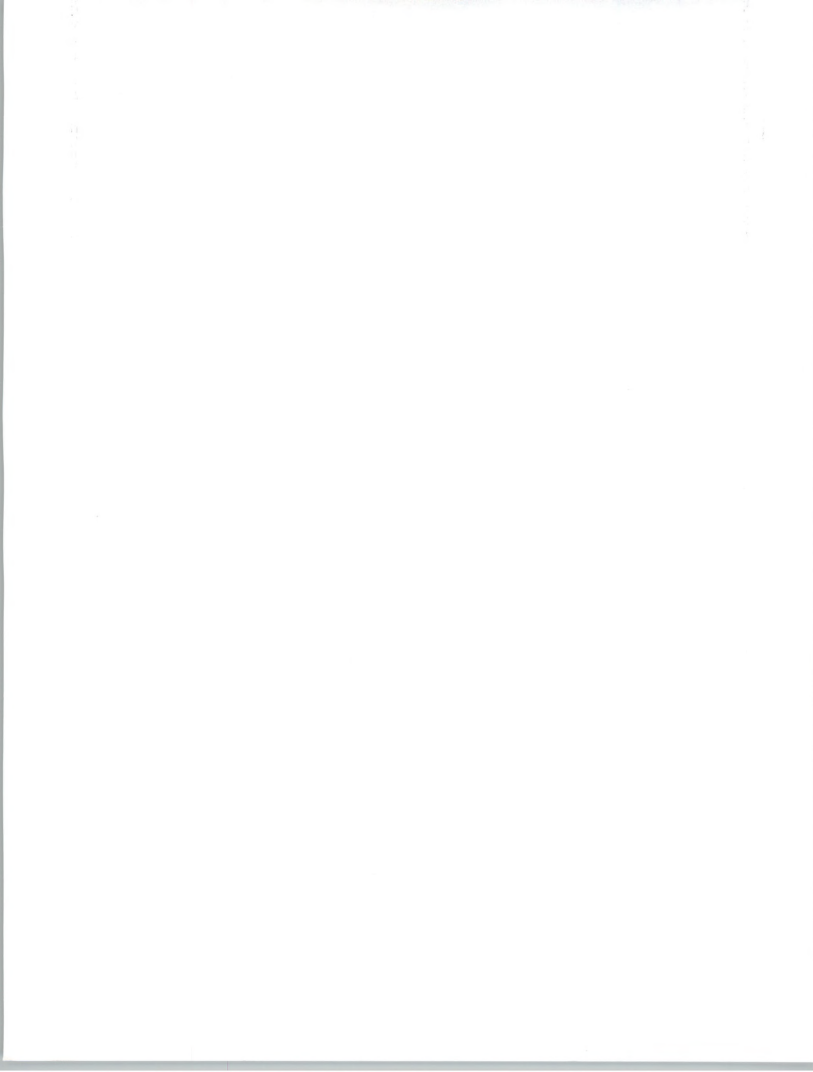
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Les Services Micros

Positionnement des Catégories de Fournisseurs sur le Marché



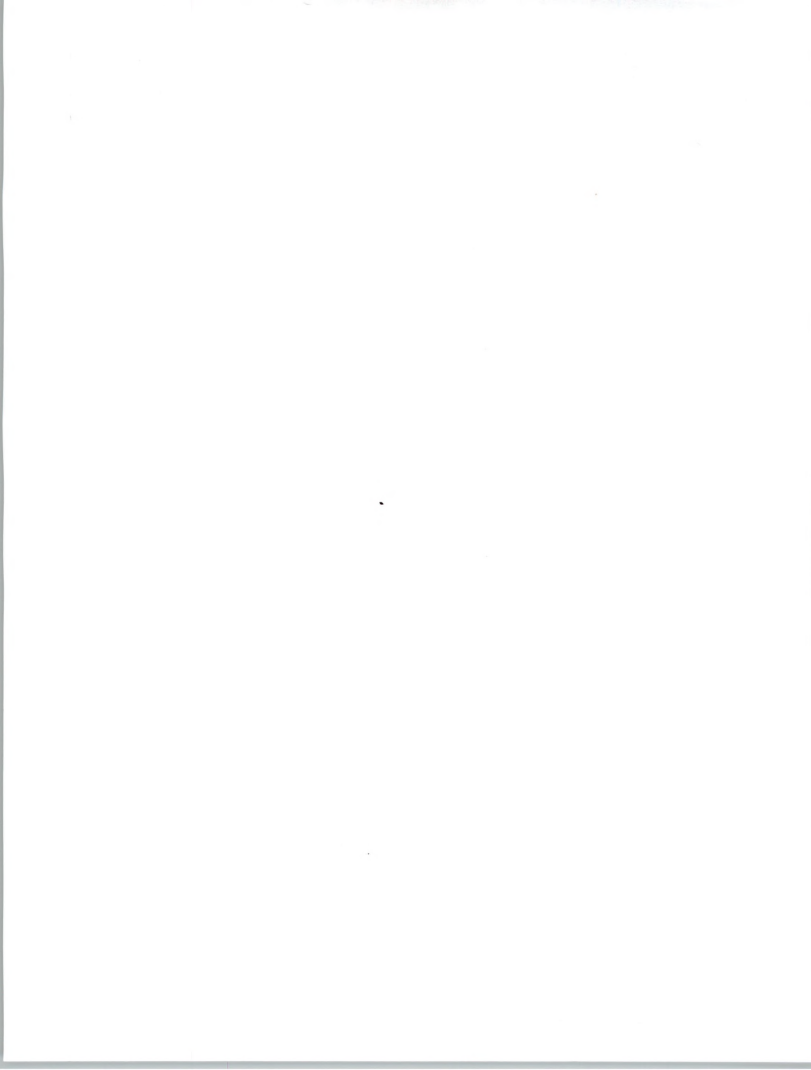


Business Operations

Définition du "FM de Fonction"

Prise en charge par un prestataire externe d'une fonction essentielle de l'entreprise et du système d'information correspondant

- Système de Facturation
- Service Client
- Gestion des documents
- Traitement des réclamations



Business Operations - “FM de Fonction”

Caractéristiques des fonctions à privilégier

- Communes à plusieurs entreprises
- A dominante humaine
- A forte teneur technologique
- Activite fluctuante



Conclusion

Stratégies d'Outsourcing

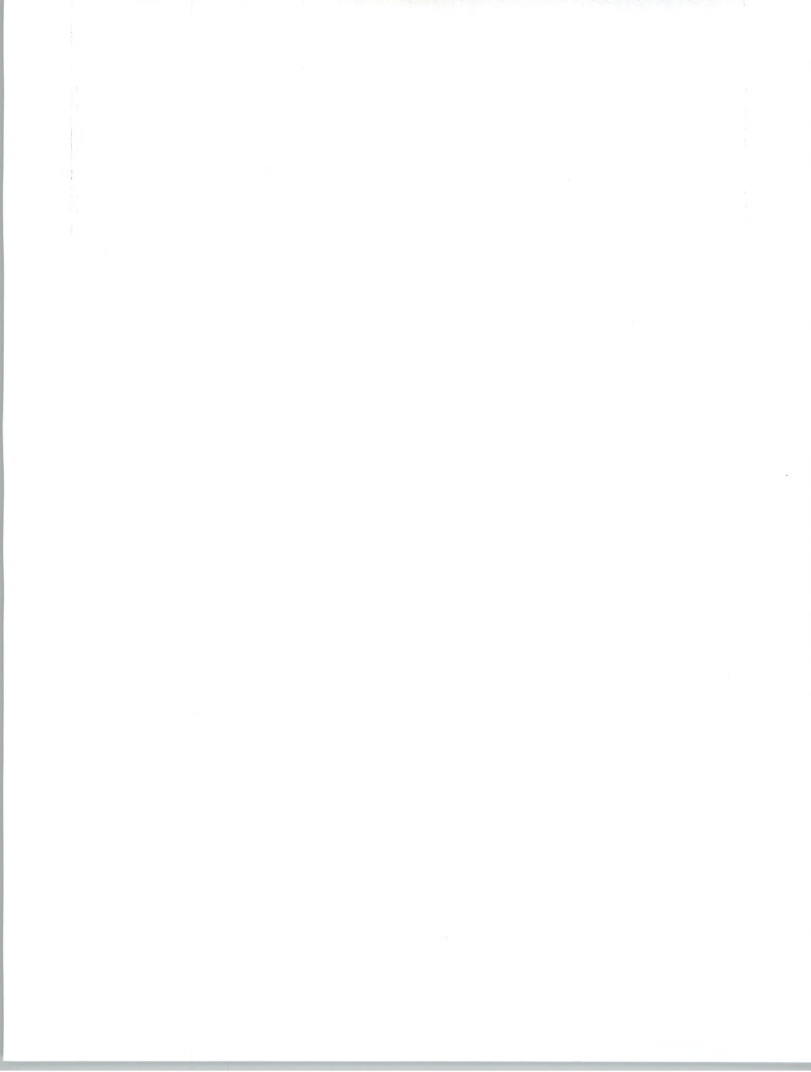
Actuelles

- Economies
- Amélioration du service

Nouvelles

- Vecteur du changement
- Stratégie d'entreprise

- Transition



Outsourcing Market Trends

Sylvie Bénech
INPUT Director



Outsourcing

Current and future market outline

Outsourcing

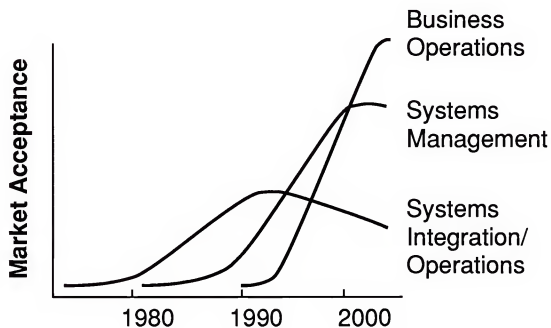
- Outsourcing evolution
- New niches



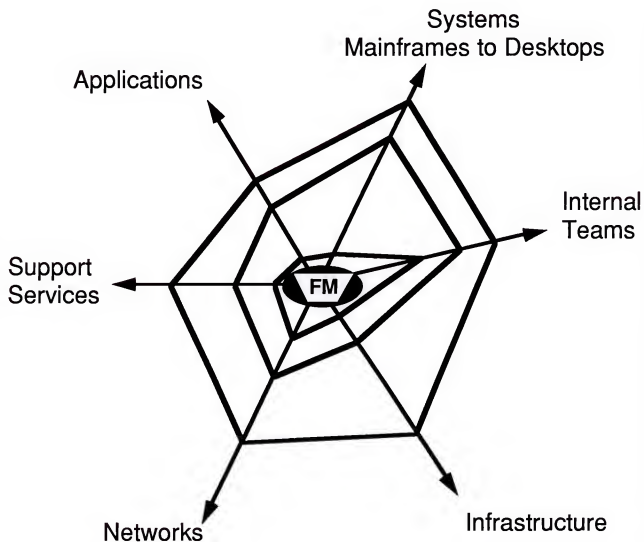
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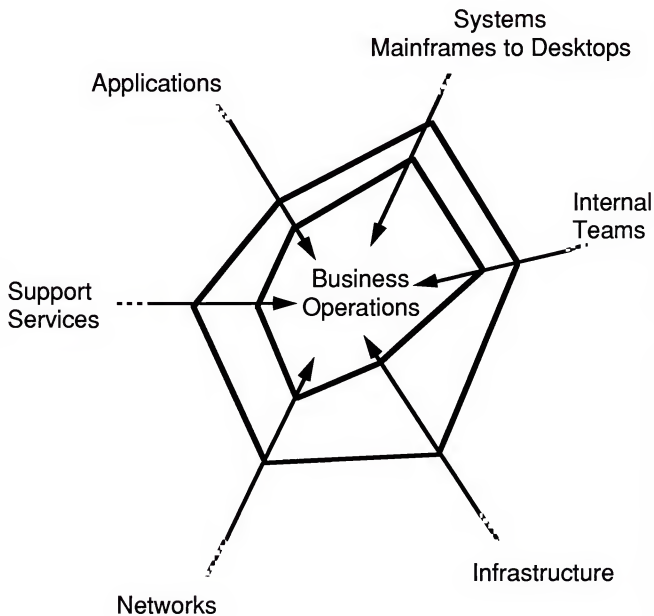
Outsourcing Market Waves

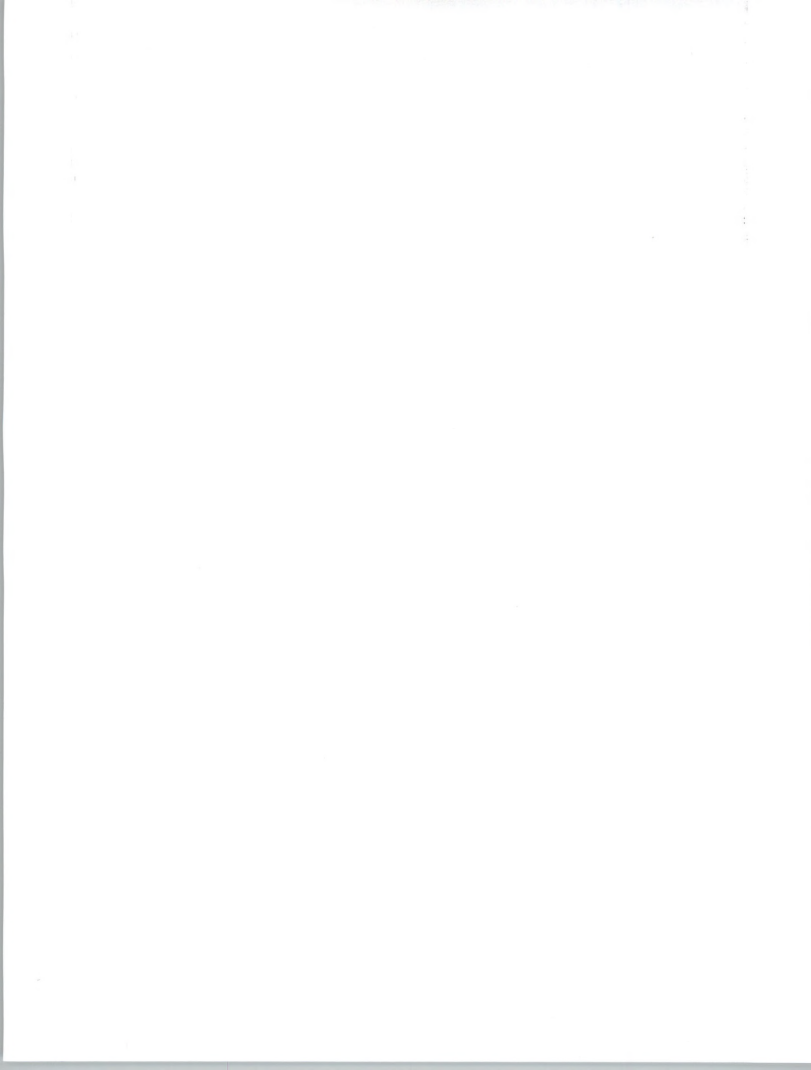


Outsourcing: A Swing-Wing Concept

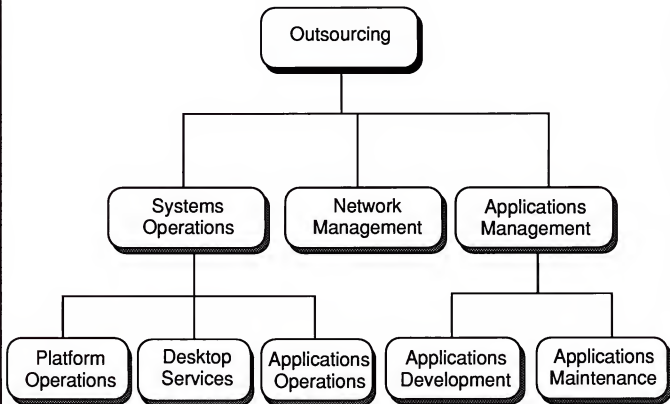


Business Operations Outsourcing





Outsourcing Components INPUT's View





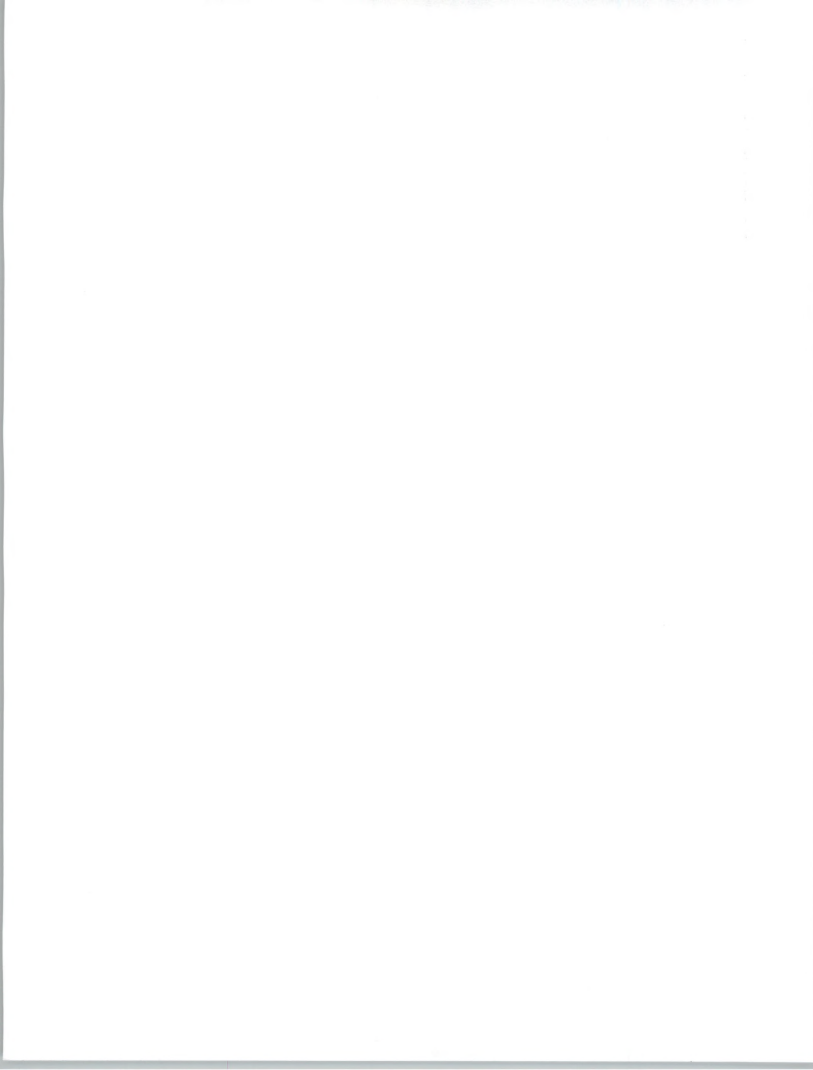
New Niches

- Transition management
- Desktop services
- Business operations

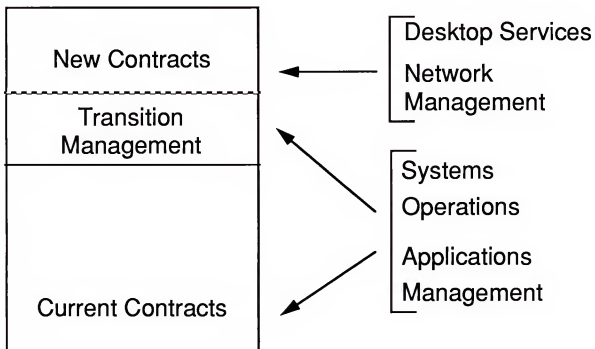


Transition Management

- Requires outsourcer as agent of change
- Transition difficult to accomplish
- Transition takes time
- Dual operational environments required



Outsourcing Contracts 1993 Analysis





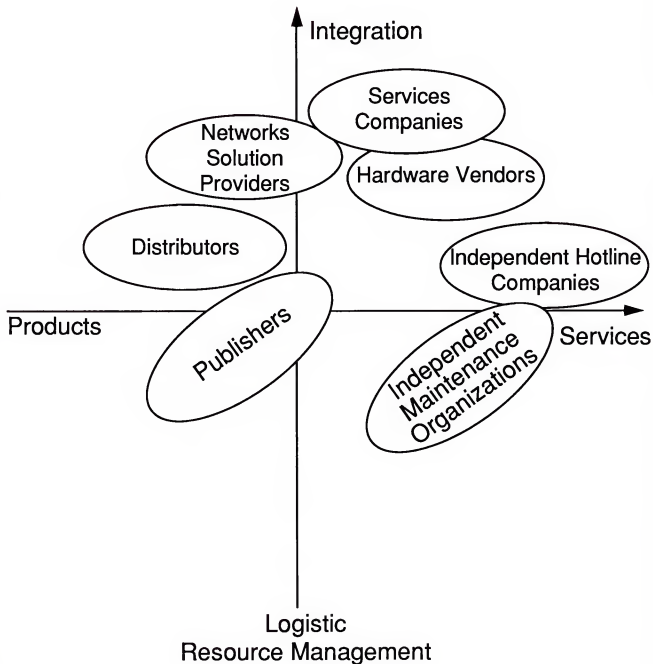
Desktop Services

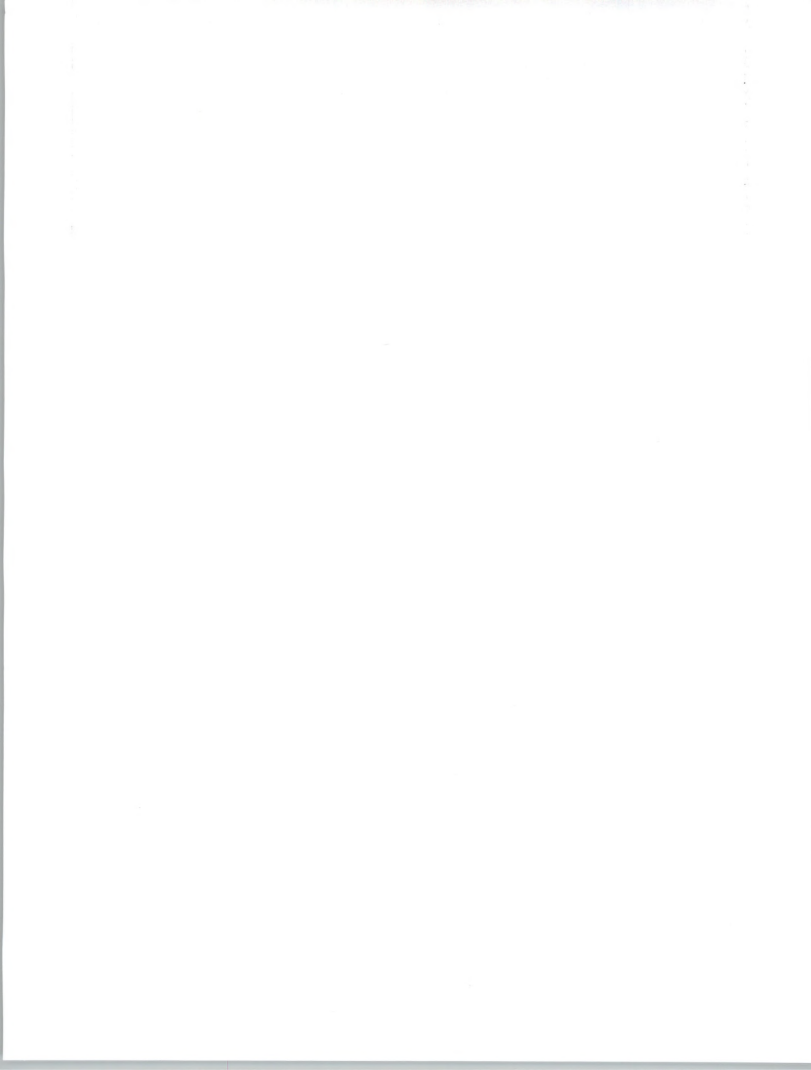
Services Offerings

Integration Services	Consultancy/Organisational Audit Purchase Advisory
Network Support	Security, LAN Management
Logistic Resource Management	Financial Services Installation Maintenance Fleet Management
End-User Support	Help Desk User Training



Vendor Positioning





“Business Operations”

Definition

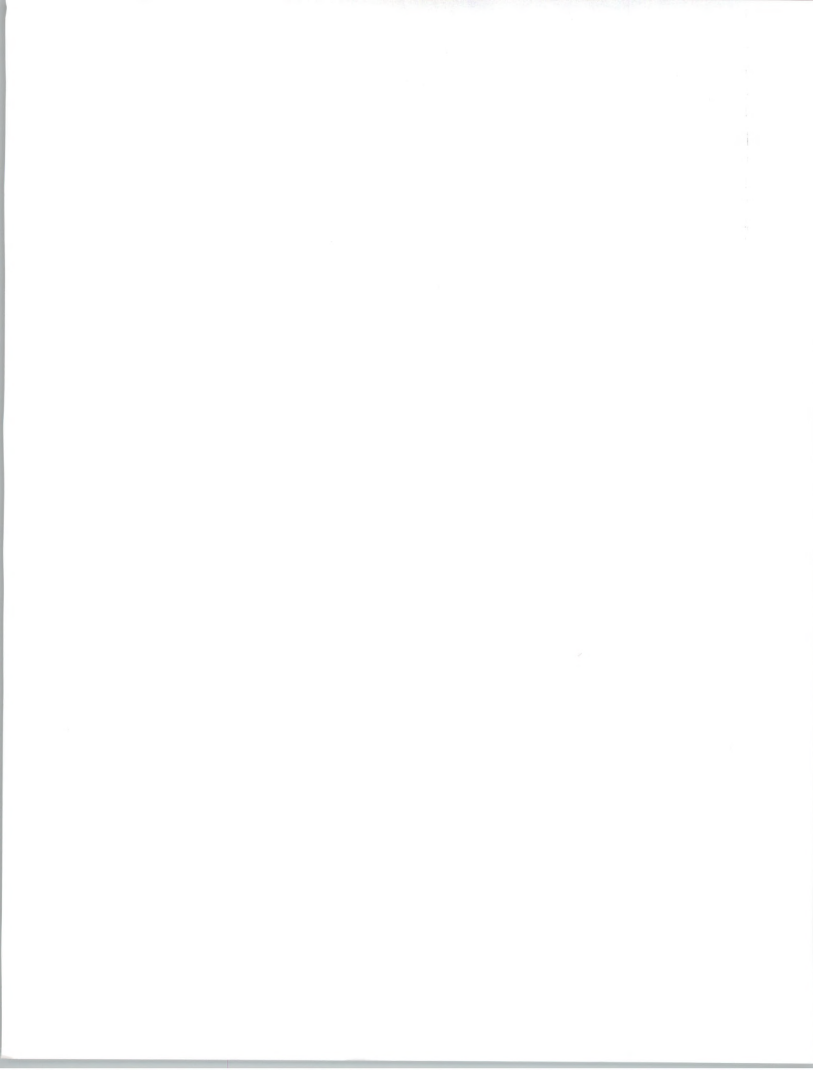
Turning over key business functions and related processes including information systems to outside companies

- Billing operations
- Customer service
- Document management
- Customer claims management

Business Operations Outsourcing

Key candidates characteristics

- Labor-intensive
- High technology content
- Common to client's industry
- Periodic peak processing required



Conclusions

Outsourcing Strategies

Current

- Economic strategies
- Service enhancement

New

- Change agent
- Business strategy

- Transition

