

2009 Top Infrastructure Management Outsourcing Vendors, Black Book Survey 2009 on ReportsandReports

In 2009, the Black Book IT Infrastructure Management Outsourcing client/user survey investigates over 700 contracts held by 3100 of the top ITO spending corporations and organizations globally.

Feb. 10, 2010 - [PRLog](#) -- Dallas, TX: ReportsandReports announce to have 2009 Top Infrastructure Management Outsourcing Vendors, Black Book Survey 2009 Results Market Research Report in its store

Traditional Infrastructure Outsourcing - versus -Remote Infrastructure Management Outsourcing – versus – IAAS

Outsourcing suppliers face the strategic dilemma in Infrastructure Outsourcing (IO) services, caused by the convergence of 'traditional' (multinational) and offshore suppliers' value propositions, a maturing remote infrastructure management delivery model, and adoption of labor arbitrage by traditional suppliers.

During the last decade, the emergence and rapid growth of new models of infrastructure services delivery, such as Remote Infrastructure Management (RIMO) and Information Management Services are showing signs of convergence with more traditional ways of delivering infrastructure service.

Offshore RIMO suppliers still hold a minor share of the IO market; nonetheless, there are increasing signs of the sophistication of RIMO leading to a growing convergence of the models of infrastructure delivery. The trend poses a challenge for buyers who need to understand the complexities of the offerings and suppliers who must refine their strategies.

The convergence of IO models is driving offshore suppliers to one of three choices:

- Continue to adopt key elements of the traditional infrastructure management outsourcing model,
- Build added value to their remote offering or
- Simply continue to focus on classical RIMO services that rely on labor savings as a key driver.

On the other hand, traditional IO suppliers are confronted with a simpler, but not less challenging option:

- Focus on end-to-end infrastructure deals that avoid direct competition or develop variations of a converged RIMO/Traditional IO offering with an active role of labor arbitrage.

Evidence of convergence can be seen as offshore suppliers of remote management services are not limiting themselves anymore to targeting smaller companies with a basic labor arbitrage value proposition.

Large buyers (above US\$10 billion in revenue) now account for 55 percent of the deals signed by offshore suppliers. Although the majority of offshore deals are still based on delivering remote services offshore, RIMO suppliers held 26 percent of more traditional deals in 2008 compared to only five percent in 2004.

Key Client Experience Findings

- Most Important Customer Satisfaction

Innovation, Trust, Reliability and Deployment are the most important attributes influencing Client Companies' satisfaction with their infrastructure outsourcing providers.

- ITO Infrastructure Vendor Satisfaction Is Highest Among Mid Market Vendors

Clients with annual revenues from \$500M to \$1B are significantly more satisfied with their Infrastructure Outsourcer than are Large Market Cap clients.

- US Vendors Are Significantly Preferred By US Clients

Latin American alternatives are challenging Indian infrastructure vendors as they evolve, although two vendors, HCL and TCS are commanding market growth share and commanding global user respect.

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