

THE 2010 GLOBAL OUTSOURCING



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INTERNATIONAL ASSOCIATION OF OUTSOURCING PROFESSIONALS

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Outsourcing Strikes Back

After a lull in the action, business and innovation are on the rise.

science fiction films, it's called the hibernation scene: The hero is put into a long sleep—frozen in time—only to wake in a new, unknown world. In the movies, hibernation doesn't often end well (think Planet of the Apes). So perhaps it's little surprise that when corporations put new outsourcing projects on hold last year as the economy imploded, outsourcing specialists feared the worst. What they got, however, was something decidedly better. After a nail-biting pause in the action, the volume of outsourcing work started rising. According to the Global TPI Index which measures commercial outsourcing contracts valued at greater than \$25 million—the fourth guarter of 2009 saw \$24.7 billion of new business, the best performance in six quarters.

What happened? Not a miraculous turnaround of the economy, to be sure. But the financial crisis did sound a wake-up call that market conditions can change abruptly and that businesses need to change with them. "Companies are realizing that they need flexibility, the ability to contract when problems arise and expand when opportunities appear," says Michael Corbett, chairman of the International Association of Outsourcing Professionals (IAOP). "At the same time, they are under enormous cost pressure. Outsourcing not only allows them to ramp up and down on demand but also to take advantage of their partners' lower cost structure."

In short, outsourcing isn't expanding in spite of an uncertain economy—but because of it. This was clear at IAOP's 2010 Outsourcing World Summit in February, when 70% of the nearly 600 attendees said they (or, in the case of service providers, their customers) were pursuing more outsourcing opportunities than just a year earlier. And a lot of that work is sophisticated stuff: According to the Offshoring Research Network at Duke University, almost one-third of outsourcing projects today are for

research and development, product design, analytical services, and similar knowledge-based tasks. At the same time, geography, technology, politics, and social considerations are also having an impact on the market. Here's a look at five key trends.

The Focus on Managing Cost

While companies outsource for many reasons—to access talent, conserve capital, or focus on core business tasks cost is usually the primary consideration. If anything, the economic crisis has only underscored that. In IAOP's February summit survey, 61% of organizations said their reasons for outsourcing have become more focused on immediate or long-term cost savings.

Those savings can be significant. Consider, for example, document process management services—including copying, printing, scanning, and mail management. "If a company has never outsourced its print/copy fleet or print/ copy-center operation, as a general rule of thumb we can help them save up to 30%," says Joseph R. Marciano, president and CEO of Océ Business Services Inc., a leading provider of document process outsourcing services and technology. However, the business value of document management services goes beyond cost reduction. For the past three years, Océ has surveyed businesses about their document management strategies. Survey findings reveal that almost as important as cost reduction, companies want

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document management services to help them improve efficiency, concentrate more on core business activities, and gain access to best practices.

In addition to helping companies meet these goals, Océ helps them measure and continuously improve their outsourced document management activities. To achieve this, an Océ performance management system, Océ MAX, monitors workflows and key performance indicators such as cost per page or equipment downtime for print/copy services. "Having information like this makes it easier

Almost one-third of outsourcing projects today are for research and development, product design, analytical services, and similar knowledge-based tasks, according to the Offshoring Research Network at Duke University. for companies to outsource essential document processes with confidence," says Marciano. He adds that clients can rest assured that their service level agreements and key performance indicators are systematically monitored against business objectives.

Outsourcing customers are also discovering the advantages of bundling relying on a single provider for multiple services. While the strategy often enables companies to negotiate better rates (just as cable TV providers will offer a better deal if customers take their phone and Internet service, too), it can also lead to better outcomes. "It allows a provider to take a mix of services and integrate them in a way that addresses the specific needs of a client," says Dylan Taylor, CEO, USA, of Colliers International, the world's third-largest commercial real estate company.

Traditionally, a company needing, for example, real estate brokerage and facilities management would view these as separate services, requiring separate contracts with different providers. Each might be good at their task, but rarely did they have the full picture of what the other providers were doing, which could result in delays and inefficiencies. By integrating multiple real estate services, Colliers can put experts in each area at the same table. "Ultimately, you're better equipped to design the right solution," says Taylor. "And you move faster."

New Centers of Excellence Emerge

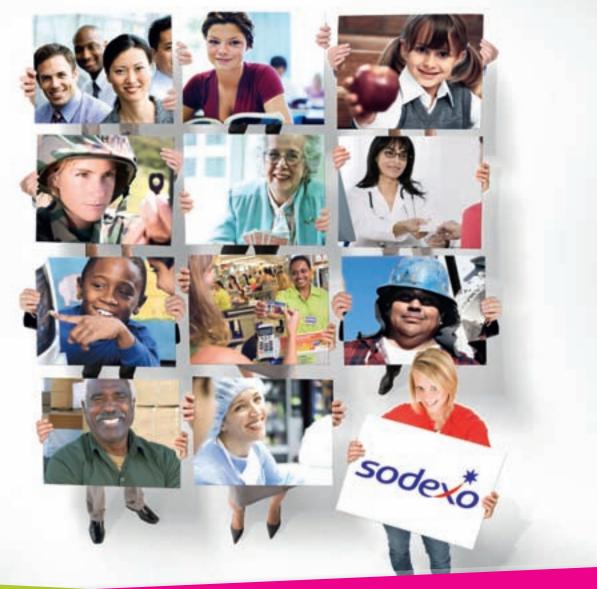
India may still be the offshore superpower, but other locations are gaining ground. In Latin America, Brazil and Chile are emerging as outsourcing hotspots. "They've got good universities, good infrastructure, and a lot of SAP and open-source software skills," says Atul Vashistha, chairman of Neo Advisory Inc., an outsourcing advisory firm.

Across the globe, Eastern Europe is now a leading center for information technology (IT) work. And it's not just lower costs that are drawing customers. "Eastern Europe offers European culture, geographic proximity to Western Europe, and an abundance of engineering talent," says Sergei Levteev, CEO of IBA Group, one of the region's largest IT companies, with software development centers in Belarus and the Czech Republic. "As IT departments face tightened budgets, more limited resources, and growing time constraints, outsourcing to Eastern Europe becomes a key strategy in addressing those challenges."

Another selling point: While Eastern Europe may be a relatively new outsourcing destination, it has a long history of technical excellence. "Belarus was the Silicon Valley of the former USSR," says Levteev, "with many

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research institutions and large production facilities concentrated in the country." IBA's first development center was founded back in 1993, and the company has grown to more than 2,500 IT and business professionals. It's also grown its skill set. Today, IBA provides a full range of software development services, with a special focus on mainframe systems and applications, enterprise resource planning (ERP) systems, data warehousing, and business intelligence. IBA's customers include large multinational corporations like IBM, Goodyear, and Fujitsu.

A Paradigm Shift in Technology

Technical advances are also changing the way outsourced services are delivered and managed. Perhaps the most significant is cloud computing, a technology that enables computer applications—everything from customer relationship management and payroll to data storage—to run offsite, on a provider's equipment, and link back to the client via the Internet. Cloud computing not only lets companies reduce their infrastructure costs, it also enables them to quickly scale up or down, using and paying for—only the amount of service they need at any given time.



Corporate Stewardship Is Key

The message is getting out: Corporate social responsibility (CSR) policies that consider, and improve, a company's impact on businesses, customers, communities, and the environment don't just make for good press. For outsourcing customers and providers alike, CSR has become a way to do the right thing while boosting efficiency, savings, and employee morale. In a 2009 survey of IAOP's membership, Bill Hefley of the University of Pittsburgh and Ron Babin of Ryerson University in Toronto found that 71% of respondents believed that CSR will become more important in future outsourcing contracts.

Providers are already seeing customers align their outsourcing goals with their CSR initiatives. When Bremer Financial Services partnered with Océ Business Services, it wanted to reduce costs while bolstering its sustainability efforts. Océ helped do both by implementing best practices, such as replacing desktop printers with multifunction devices that print, copy, scan, and fax. "Our paper usage volume dropped by millions of sheets, and we realized thousands of dollars in savings," says Kathy Tucci, Bremer's vice president for facilities and administrative services.

The savviest providers know that CSR starts at home. "As an outsourcing company, we don't live off selling products, but by delivering services via people," says Jeff Gravenhorst, CEO at ISS, one of the world's leading providers of facilities services. "You need to be really conscious of your social responsibility to them. By paying fairly and on time, by putting in place strict safety standards and a code of conduct, and by helping communities, you ensure that your people are healthy, happy, and engaged. ISS has close to 500,000 employees. This is the only way to behave."

There is an external component to CSR, too. "Customers want to know that your social behavior is okay," says Gravenhorst, "because a provider's bad practices quickly become their bad press." Conversely, good behavior strengthens relationships. "Our customers are taking a hard look at how they impact the environment, seeking more and more CO₂ reductions," he adds. "We're helping them do that, moving from nighttime to daytime cleaning to save energy, using less chemicals in our products, and reusing water as much as possible. Our customers want to be known for taking this seriously. And so do we."

From its founding in 1966, Sodexo Group—the world leader in Quality of Daily Life Solutions—has made the economic, social, and environmental development of the communities in which it operates a corporate priority. "Clients want to conduct their business in a more sustainable manner and protect their image as responsible companies," says Michel Landel, Sodexo's CEO. "Increasingly, they are asking us to leverage our own CSR expertise as we design, manage, and deliver solutions for them."

Sodexo's Better Tomorrow Plan focuses on three areas of sustainability: the environment; local communities; and nutrition, health, and wellness. Sodexo's processes are continuously tweaked and new technologies are constantly incorporated so that the ultimate outcome is good for the client and good for the planet. For example, at Hobart and William Smith Colleges in Geneva, New York, Sodexo initiatives have reduced yearly C0, emissions by 793 000 pounds and generated more than \$2.4 million in energy savings since 1990. And the "Zero Waste Initiative" Sodexo put into operation in 2008 at BHP Billiton's Olympic Dam in Australia resulted in the recycling of 28 tons of waste in the first 10 monthssaving thousands of dollars, which were donated to the Adelaide Women's and Children's Hospital and the local branch of the Royal Flying Doctor Service.

INNOVATIONS THAT WORK

IBA has built a diversified portfolio of technical skills that address all aspects of clients' IT needs, providing them with competitive advantages.

t IBA Group—one of the largest information technology companies in Eastern Europe—the philosophy is simple: Outsourcing isn't just about providing a service to clients; it's about partnering with them. That means collaborating and innovating with some of the best-known companies in the world, companies like IBM and Goodyear. It means staying on top of the latest technologies and mastering them. It means clients get



they get it. To that end, IBA provides services on the development of corporate performance management systems—based on IBM Cognos, data warehousing, and ETL toolsto enable customers to monitor and analyze their operations and make sure they are aligned with their strategic goals. Another IBA software platform—known as e-University—supports online distance learning and training.

more than results—they get ahead of their competition.

"There are a lot of reasons U.S. and Western European companies are now coming to Eastern Europe for IT work," says Sergei Levteev, IBA's CEO. "We have a wealth of engineering talent, a strong educational system, low employee turnover, and very competitive prices. But while the destination is comparatively new, clients are often surprised to discover we've been around a while—17 years, to be exact."

Full-Cycle Development

That time has been put to good use. During this period, IBA has built a diversified portfolio of technical skills intended to address all aspects of a client's IT needs: software engineering; product development; software testing, migration, and maintenance; and support services. The company has

developed a special focus on enterprise applications (including portals and Web 2.0 solutions), Lotus technologies, data warehousing, and SAP and other enterprise resource planning systems. "What distinguishes us from so many other IT companies is that we provide full life-cycle software development, from initial design to ongoing support," says Levteev.

Partnership, however, takes more than a grasp of the technologies that can help a client. It means understanding how clients work and what they need to work better, and then making sure IBA innovation can also be seen on the hardware side, in products created from the ground up to meet client needs. The company's self-service Information and Transaction Terminals (ITTs) enable bank customers in Belarus and other countries in the Commonwealth of Independent States to pay utility and other bills and obtain quick access to financial information. Another IBA-developed mobile banking system allows consumers to pay bills directly from their cell phones. In all, the company manufactures and supplies some 200 different software and hardware products—with plans to release more.

Collaboration and Communication

IBA's partnerships, however, don't stop with its clients, which come from more than 30 countries and a host of industries. Close ties with universities and research labs enable IBA to

> stay at the forefront of a rapidly changing technology landscape and to hire the top talent in the region. At the same time, collaboration and communication among IBA's 2,500 employees—gray-haired gurus and young developers alike—mean that no one works in a vacuum.

"If we're going to develop products successfully we have to work as a team, constantly sharing information and ideas, both with clients and among ourselves," says Levteev. "Other companies may see that as a challenge. We see it as a necessity. And a competitive advantage."





Sergei Levteev, IBA Group CEO



Seismic Shifts in Government Policy

One final trend warrants particular attention. With November elections looming and U.S. unemployment remaining high, we're likely to see legislative attempts to hinder and delay offshore projects. New regulations could change the tax laws, restrict the export of personal data, or limit government contracts to companies that keep the bulk of their work within the U.S.

Companies need to prepare for this. One way is through the provisions they put in their outsourcing contracts. "Customers may want the ability to change services and locations as regulations evolve—or a right to terminate," says Neil Hirshman, a Kirkland & Ellis lawyer who has represented both customers and providers in outsourcing transactions. "They'll also want to know who bears any increased costs."

In other words, both customers and providers will want to plan their deals carefully, making sure there is enough flexibility to tackle unforeseen events. Maybe that's the one good thing to come out of an economic meltdown: It gets you thinking along those lines very quickly. —Alan Cohen

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In a 2009 survey of IAOP's membership, 71% of respondents believed that CSR will become more important in future outsourcing contracts.

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Scoring was based on a review of applications by an independent panel of judges with some additional fact-checking. Final ranking was based on a weighted average of four distinguishing characteristics: size and growth rate; customer references; demonstrated competencies; and management capabilities.

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1	Accenture	www.accenture.com	Customer References	IT & Comm. Mgmt.; Financial Mgmt.; HR Mgmt.
2	Infosys Technologies	www.infosys.com	Demonstrated Competencies	IT & Comm. Mgmt.; Transation Proc.; Engineering Svcs.
3	Sodexo	www.sodexo.com	Balanced Performance	Facility Svcs.; Motivation Solutions; Real Estate & Asset Mgmt.
4	Wipro Technologies	www.wipro.com	Management Capabilities	IT & Comm. Mgmt.
5	IBM	www.ibm.com	Management Capabilities	IT & Comm. Mgmt.; CRM; Financial Mgmt.
6	ISS	www.issworld.com	Demonstrated Competencies	Facility Svcs.
7	Tata Consultancy Services	www.tcs.com	Management Capabilities	IT & Comm. Mgmt.; IndusSpecific Svcs.; R&D
8	ARAMARK	www.aramark.com	Balanced Performance	Food Service & Refreshments; Facility Svcs.; Uniform & Work Apparel
9	CSC	www.csc.com	Demonstrated Competencies	IT & Comm. Mgmt.; Transaction Proc.; CRM
10	Convergys	www.convergys.com	Customer References	CRM; IT & Comm. Mgmt.; HR Mgmt.
11	ACS	www.acs-inc.com	Management Capabilities	IT & Comm. Mgmt.; HR Mgmt.; Transaction Proc.
12	Jones Lang LaSalle	www.joneslanglasalle.com	Management Capabilities	Real Estate & Asset Mgmt.; Facility Svcs.; Corporate Svcs.
13	CB Richard Ellis	www.cbre.com	Customer References	Real Estate & Asset Mgmt.; Facility Svcs.
14	Johnson Controls	www.johnsoncontrols.com	Demonstrated Competencies	Facility Svcs.; Real Estate & Asset Mgmt.
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28	Stream Global Services	www.stream.com	Demonstrated Competencies	CRM
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The Outsourcing Hall of Fame

Dmitry A. Loschinin, president & CEO, Luxoft; Joshua R. Jewett, senior vice president – information technology and procurement & CIO, Family Dollar Stores; and Dr. Ganesh Natarajan, past chairman, NASSCOM (2008-2009), accepting on behalf of the late Dewang Mehta, past president, NASSCOM, are presented with The 2010 Outsourcing Hall of Fame award by Atul Vashistha, COP, CEO of Neo Advisory and chair, IAOP's Advocacy & Outreach Committee (far left); Michael F. Corbett, chairman, IAOP; and Debi Hamill, senior managing director, IAOP, at IAOP's Outsourcing World Summit, Lake Buena Vista, Florida, February 16, 2010.

OUTSOURCING HALL OF FAME

IAOP's Outsourcing Hall of Fame is one of the most prestigious awards available to individuals working in the field of outsourcing.

The Hall of Fame recognizes individuals not only for their contributions to the management practice and industry of outsourcing, but to society at-large through outsourcing.

On behalf of IAOP's global community and outsourcing professionals around the world, IAOP congratulates its 2010 inductees.

IAOP: IMPROVING OUTSOURCING OUTCOMES BY CONNECTING YOU TO THE RESOURCES YOU NEED

IAOP[®] is the global, standard-setting organization and advocate for the outsourcing profession.

With a global community of more than 100,000 members and affiliates worldwide, IAOP is the leading professional association for organizations and individuals involved in transforming the world of business through outsourcing, offshoring and shared services.

A Global Community, IAOP has members in nearly 50 countries. Each member has direct, online access to other members and to IAOP's entire portfolio of services, including its vast chapter network, regional-level events, and corporate and professional development programs.

MEMBERSHIP

Customer Corporate Membership provides organization-wide access to the association's research, training, certification and networking programs — all designed to help companies achieve better business results through outsourcing.

Provider/Advisor Corporate Membership provides the same organization-wide benefits of Customer Corporate Membership, but also includes member-only sponsorship opportunities that serve the marketing and business development needs of these companies.

Professional Membership is available to individuals either as part of their company's corporate membership or on an individual basis. This membership serves the needs of practitioners working in the field of outsourcing whether as customers, providers or advisors. In addition, it provides these professionals with direct, personal access to association services.

To learn more about IAOP, visit www.IAOP.org.

