

# 2009 The Black Book of Outsourcing: State of the Outsourcing Industry Report

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## Abstracts

An annual research staple of sourcing buyers globally, The Black Book of Outsourcing survey of service users aims to identify the 50 best-managed global outsourcing vendors through polling client experience and assessing industry developments.

### Introduction

The Satyam scandal rocked the global business community and endangered the Indian outsourcing industry with precipitous losses. But as panic subsides and dust settles, the forces driving outsourcing are as strong as ever. Buyer organizations that have struggled to “keep the lights on” are currently planning on a recovery that includes extensive expansions into both offshore and onshore outsourcing by year’s end.

The annual "State of Outsourcing Industry Report" contains Black Book's Top 50 "Best Managed" Global Outsourcing Vendors, the unbiased, client experience rankings from 24,000 validated survey participants. Measuring client experience and assessing industry developments, The State of the Outsourcing Industry Report annually aims to address what's important to the savvy and the novice industry users alike. The poll marks its seventh consecutive year of collecting data on the industry.

### Key findings

Indian outsourcers have regained strong buyer confidence by demonstrating tangible transparency, accountability and ethical management practices to eighty-one percent of US companies buying services offshore.

Technology budgets will be fully restored or expanded over the next twelve months, corroborated by sixty-eight percent of outsourcing buyers. Buyers predict fastest spending growth in progressive outsourcing organizations that consistently demonstrated client empathy through the downturn. As the economy improves, sixty percent of clients anticipate shifting from less agile outsourcers that were unmovable through recession-related renegotiation issues.

Cloud Computing & Software-as-a-Service explodes IT outsourcing growth guidance. Remote Infrastructure Management and bundled applications development / maintenance initiatives which have been on hold by ninety-one percent of CIOs will receive the most immediate funding.

BPO projects that deliver speedy return-on-investments are highest in demand. 180-day ROI's, typical in Procurement Outsourcing, Accounts Receivable, Accounting and Financial transaction processing, will be creating the greatest growth in new contracting through 2010.

## **Reasons to purchase**

Examine client-vendor relationships and seek and compare outsourcing suppliers

Identify weaknesses and areas for competitive growth

Make buying decisions

Set organizational strategy

Fine-tune governance programs

## **Key questions we asked**

Survey respondents are queried about specific targets of high priority interest in order to answer, among others, the following questions:

What are the measures of outsourcing client satisfaction beyond contractual

success?

What influences outsourcing client satisfaction beyond “faster and cheaper”?

Who best influences the outsourcing vendor selection decision?

How can prospective outsourcing buyers and investors match their unique needs to client experiences?

What are outsourcing buyers looking for and value when choosing “better” as part of their business transformation strategy beyond faster and cheaper?

What’s valued by outsourcing clients in their vendors?

What are outsourcing clients and prospective outsourcing buyers looking for next?

How do outsourcing service suppliers stack up against each other and which are the very best at meeting the evolving and maturing client relationship demands reflective in true satisfaction measures?

## **Key questions we asked**

Survey respondents were validated via external audit with double ID entry requirements and/or by email verifications and telephone follow-up to ensure corporate client responses and appropriateness of response source.

## **Our data**

Independent and unbiased from vendor and advisor influence, over 800,000 global outsourcing users are invited to participate in Black Book surveys. In 2009, Advisors were not alerted or contacted directly in a direct effort to validate past experience scores of the opening or close of the Black Book consulting firm evaluation process. In past survey years, consultants and advisors were encouraged to contact their clients to participate. The 2009 data set produced current and objective customer service data for buyers, analysts, investors, consultants, competitive suppliers and the media, as well as validated the opinions of actual users without interference of influence from those firms being studied.

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