

2009 Infrastructure-as-a-Service and Cloud Computing, Black Book Survey 2009 Results

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Abstracts

In 2009, the Black Book IT Infrastructure Management Outsourcing client/user survey investigates over 400 contracts held by 1120 of the top ITO spending corporations and organizations globally.

KEY CLIENT EXPERIENCE FINDINGS

Key finding: THE MOST IMPORTANT CUSTOMER SATISFACTION KPIs TO OUTSOURCED INFRASTRUCTURE IN 2009

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

Key finding: ITO INFRASTRUCTURE VENDOR SATISFACTION IS HIGHEST AMONG SMALL & MIDMARKET VENDORS CURRENTLY

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

Key finding: US VENDORS ARE SIGNIFICANTLY PREFERRED BY US CLIENTS

Latin American alternatives are challenging Indian infrastructure vendors as they evolve.

PREFERRED LOCATION FOR CLOUD INFRASTRUCTURE MANAGEMENT OUTSOURCING VENDOR BY

WESTERN EUROPEAN CLIENTS**(SELECT TWO)**

UK 96.1%

France 80.8%

Germany 5.5%

Norway/Sweden/Denmark 4.7%

Russia/Eastern Europe 3.2%

HIGHEST ANTICIPATED**GROWTH INDUSTRIES****FOR INFRASTRUCTURE AS A SERVICE****INDUSTRY CY2009 BUDGETED/ ANTICIPATED BUDGETING INFRASTRUCTURE
OUTSOURCING****INITIATIVES****ADD ONS NEW**

COMMUNICATIONS 70.8% 30.7%

NONPROFITS 64.2% 20.4%

EDUCATION 61.5% 25.7%

MANUFACTURING 55.2% 14.9%

ENERGY 50.7% 20.8%

TECHNOLOGY 43.2% 31.4%

INSURANCE/FINANCE 28.5% 18.2%

**PREFERRED LOCATION FOR CLOUD INFRASTRUCTURE MANAGEMENT
OUTSOURCING VENDOR BY****US CLIENTS****(SELECT TWO)**

United States 94.0%

Mexico 32.1%

India 26.6%

Brazil 24.1%

Chile 10.0%

WOULD CONSIDER OFFSHORE**CLOUD FIRMS IN FUTURE AS INDUSTRY MATURES**

India 90.8%

Latin America 91.3%

Eastern/Central Europe 80.5%

China 11.4%

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CLOUD COMPUTING AND ISAAS

SUMMARY OF RESULTS

METHODOLOGY & OVERVIEW

**OVERALL RANKING SUMMARY OF ITO INFRASTRUCTURE: ENTERPRISE
MANAGEMENT VENDORS**

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