



2023

IT Sourcing Study BeLux

Whitelane Research

PRESENTATION FOR ECONOCOM
14 FEBRUARY 2023
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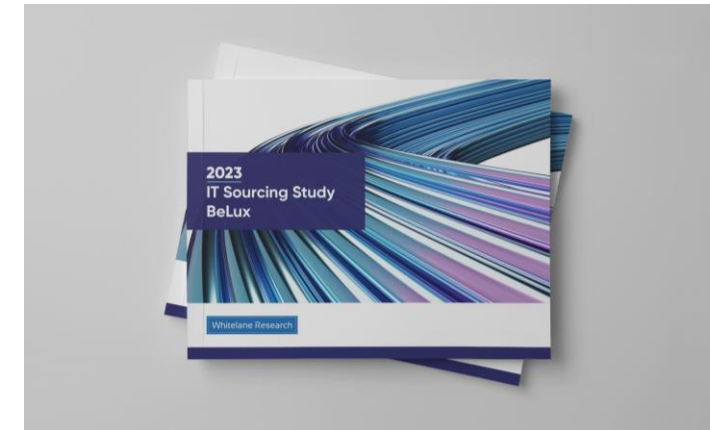
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An abstract graphic on the left side of the slide, featuring multiple concentric, curved lines in various shades of blue and white, creating a sense of motion and depth.

Agenda

1. Introduction and research methodology
2. IT sourcing and governance trends
3. IT service provider performance
4. Cloud provider performance



01

Introduction and research methodology

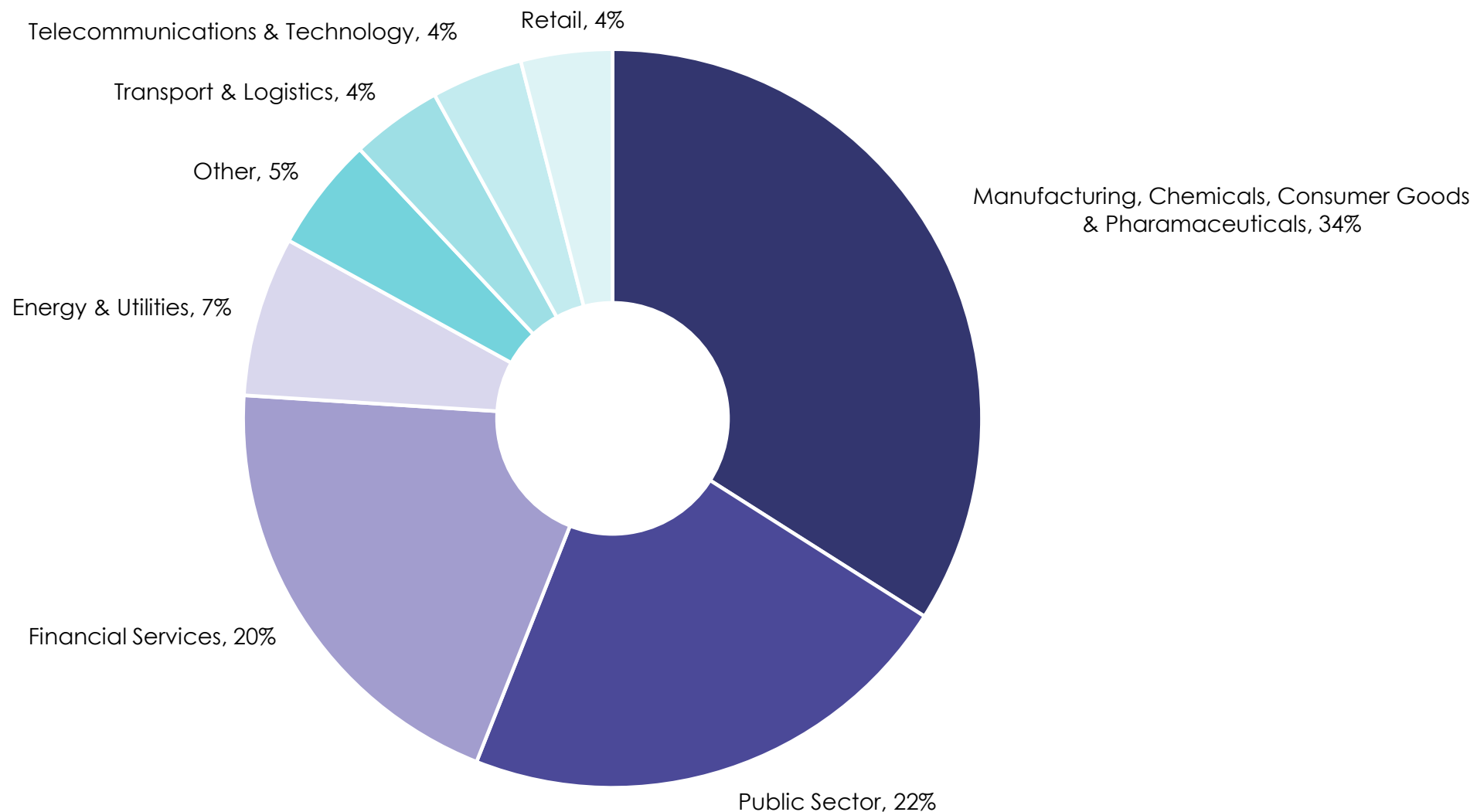
More than **250 participants of the top IT spending organisations** in the BeLux region have evaluated over **650 unique IT sourcing relationships** and **1,000 cloud sourcing relationships**.



34 IT service providers and 12 cloud providers have been evaluated and ranked based on the opinion of their clients (not on the opinion of Whitelane Research).



- In order to be ranked in this report, service providers must have at least **8 client evaluations** for general satisfaction.
- In order to be ranked in the application, infrastructure, workplace services, network and telecommunications and cloud rankings, service providers must have at least **7 client evaluations**.
- For the new 2023 IT domains (digital transformation and security services), providers require a minimum of **5 client evaluations**.
- The research findings are solely based on the data received in the market study from the respondents surveyed.
- The IT outsourcing services under evaluation are consumed by the respective country/region where the study is conducted. The evaluations are not weighted by any deal characteristics, such as the annual contract value.
- Whitelane Research is a completely independent organisation.



N=265

Whitelane Research

An independent organisation uniquely focused on IT sourcing across Europe



Since 2013 Whitelane Research has conducted annual IT sourcing studies across Europe. Our study evaluates and ranks the leading IT and cloud service providers based on key performance indicators and by segment. The study is considered one of the most representative reports on the outsourcing market.



IT SOURCING STUDIES

Unique and extensive annual IT sourcing studies surveying CIOs of the largest IT spending organizations across Europe about their opinion on their outsourcing plans and IT/cloud service providers.

END-USER EVENTS

Our events programme offers access to a senior-level network, presentations on sourcing topics and from leading CIOs on their outsourcing journey, insights from the service provider community, and exclusive networking opportunities with like-minded corporate executives.

BEST PRACTICES GROUPS

A forum exclusively for corporate executives who use sourcing as a significant part of their business strategies, allowing them to confidentially share ideas and information about their sourcing relationships.

LONG/SHORTLIST ANALYST INPUT

Long/short list options based on market/country coverage and provider performance at up to 2,000 European organizations. Includes an in-depth presentation, analyst report substantiating the options, and relevant research reports.

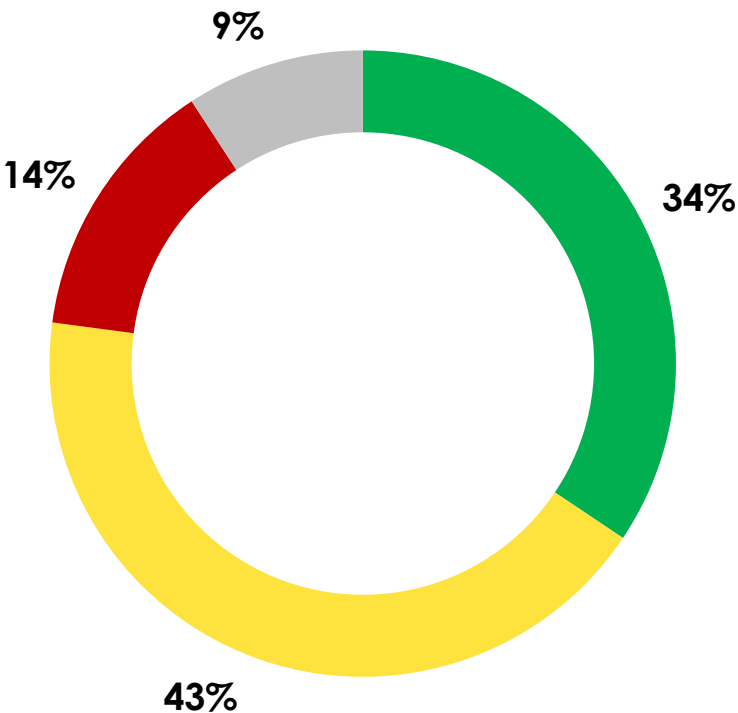
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02

IT sourcing trends

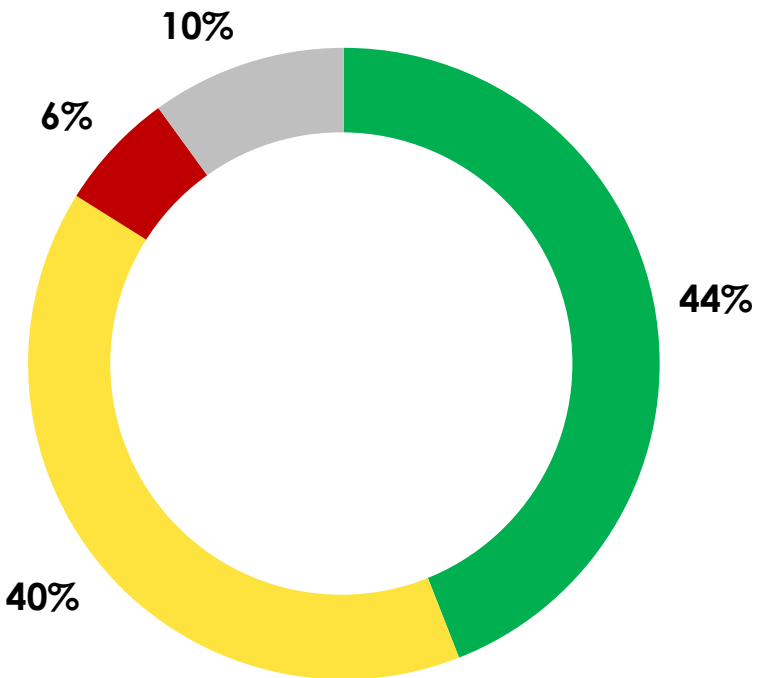
What are your organization's plans for the next two years with regard to outsourcing? (Comparison with 2022)

2023



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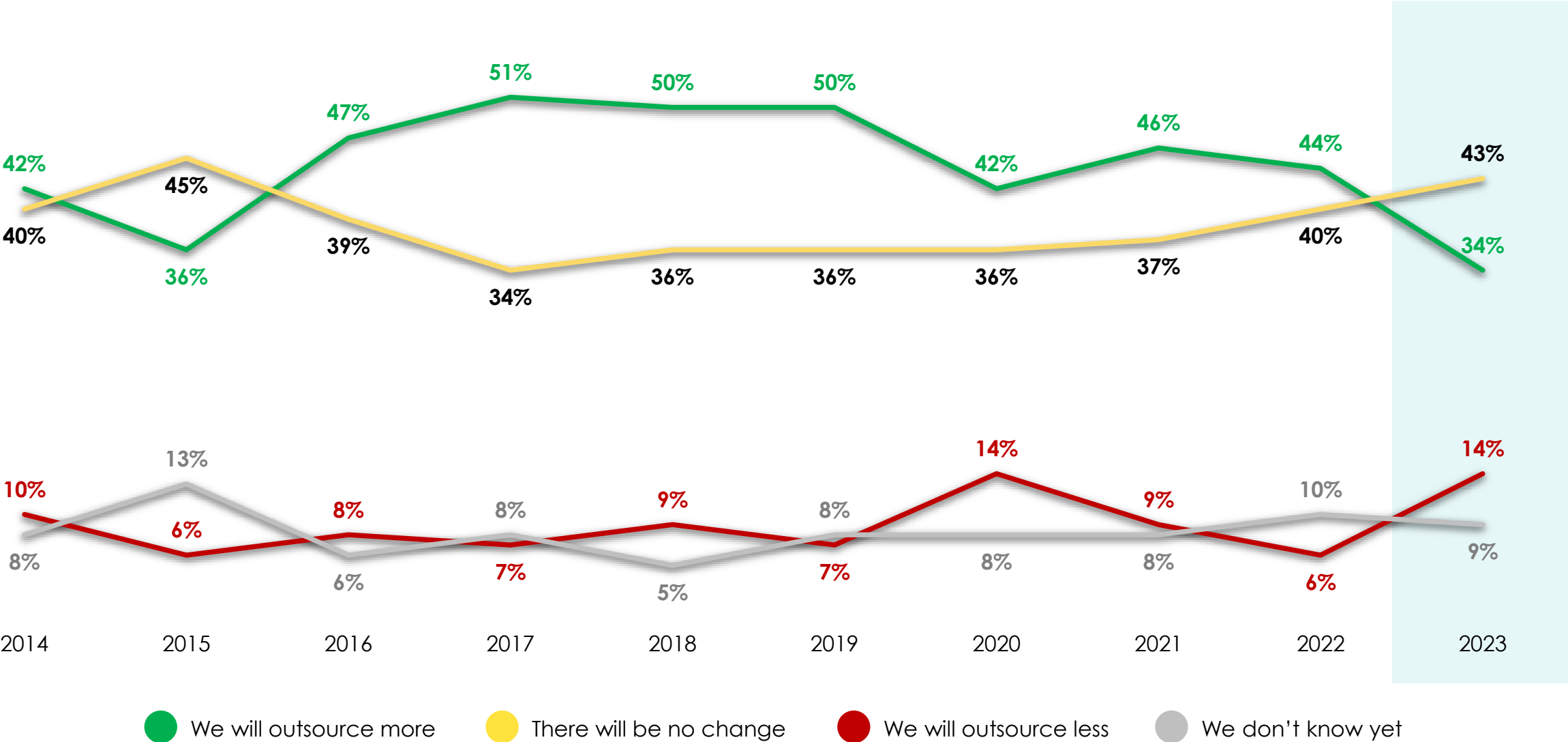
2022



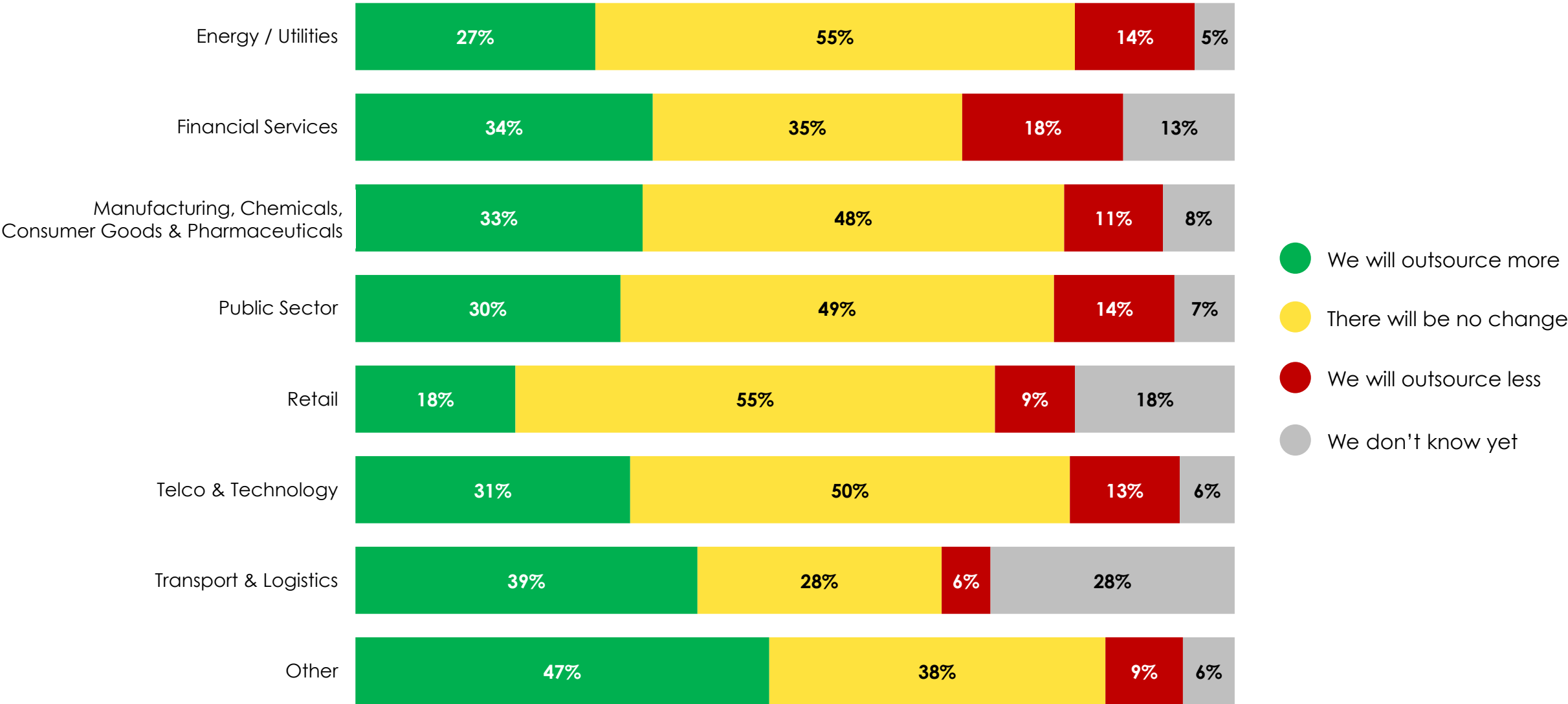
N=263

● We will outsource more ● There will be no change ● We will outsource less ● We don't know yet

What are your organization's plans for the next two years with regard to outsourcing? (10 year history – BeLux region)

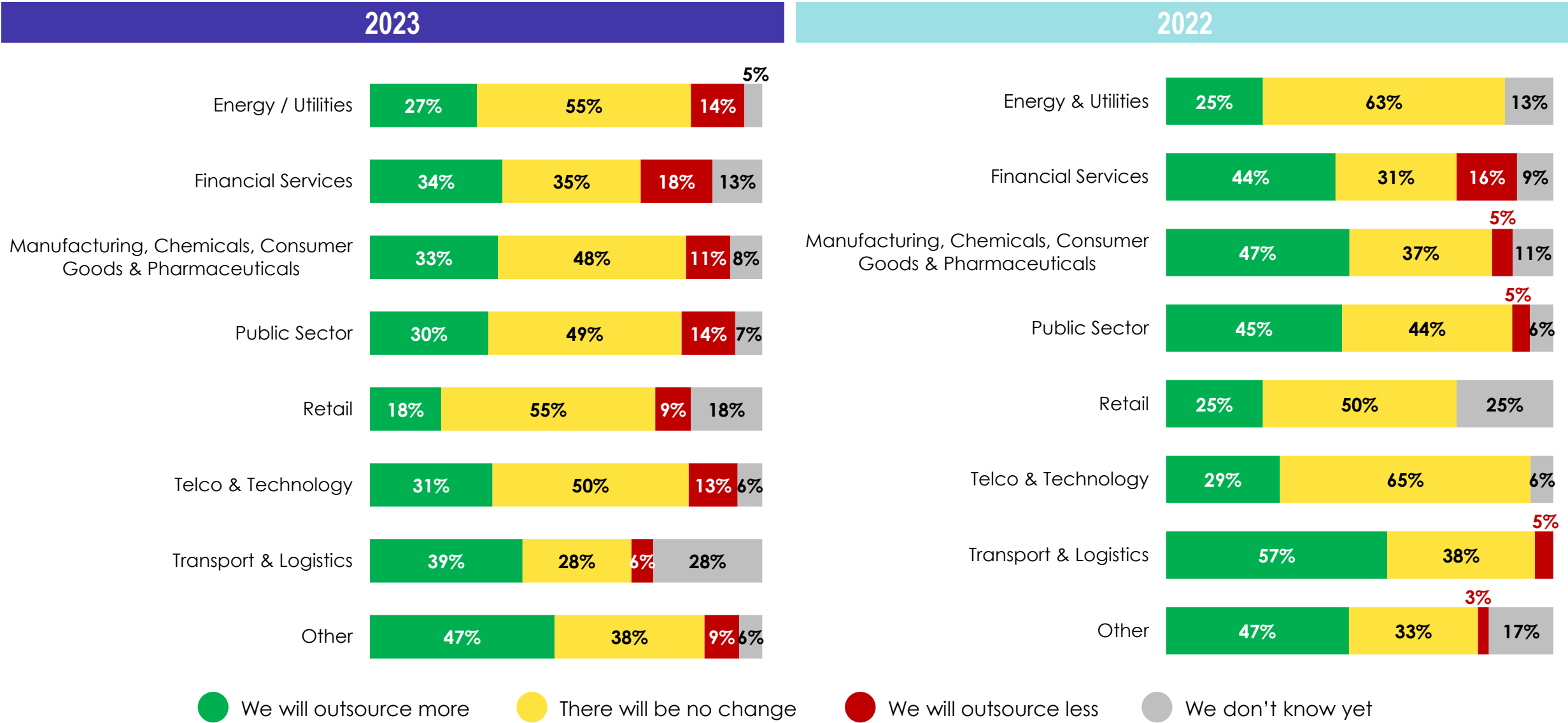


What are your organization's plans for the next two years with regard to outsourcing? (By industry)

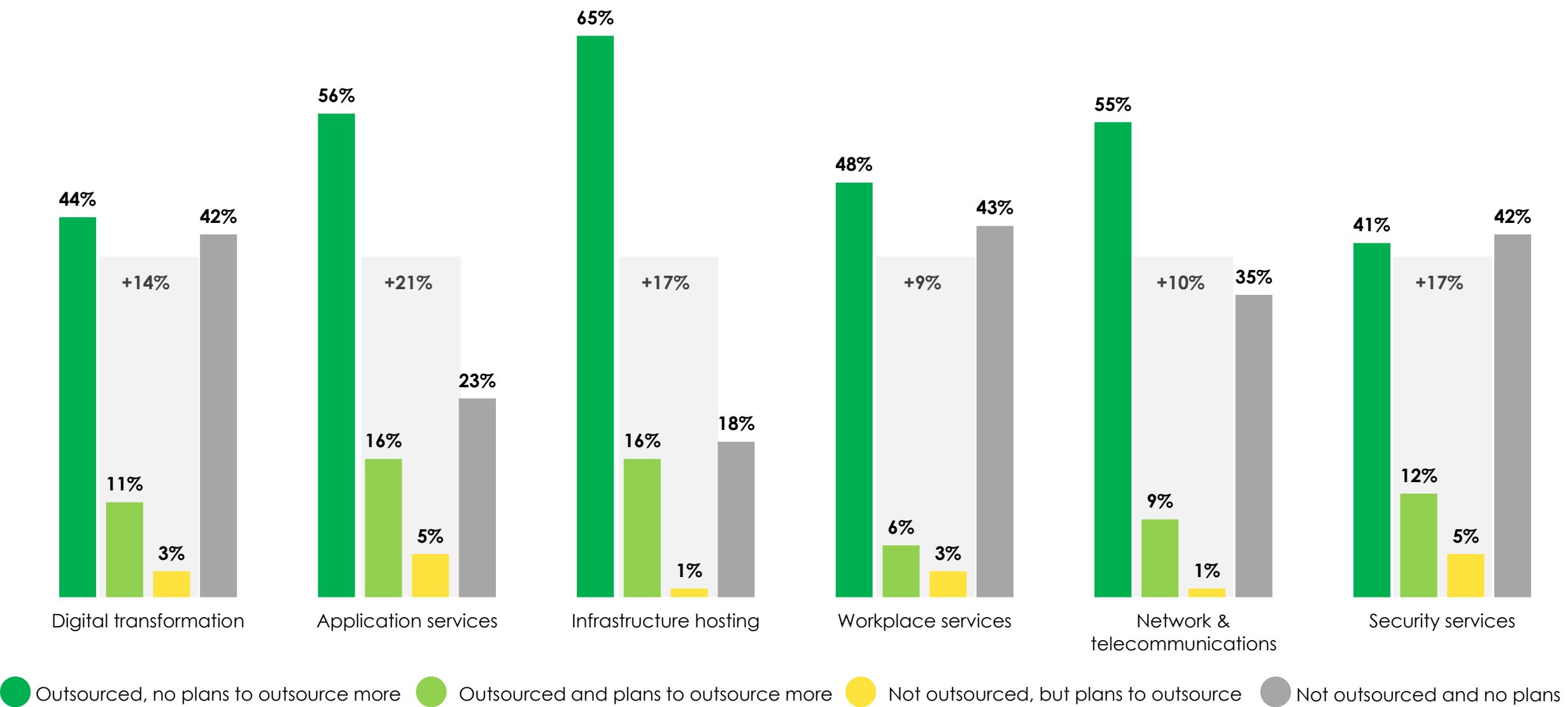


What are your organization's plans for the next two years with regard to outsourcing?

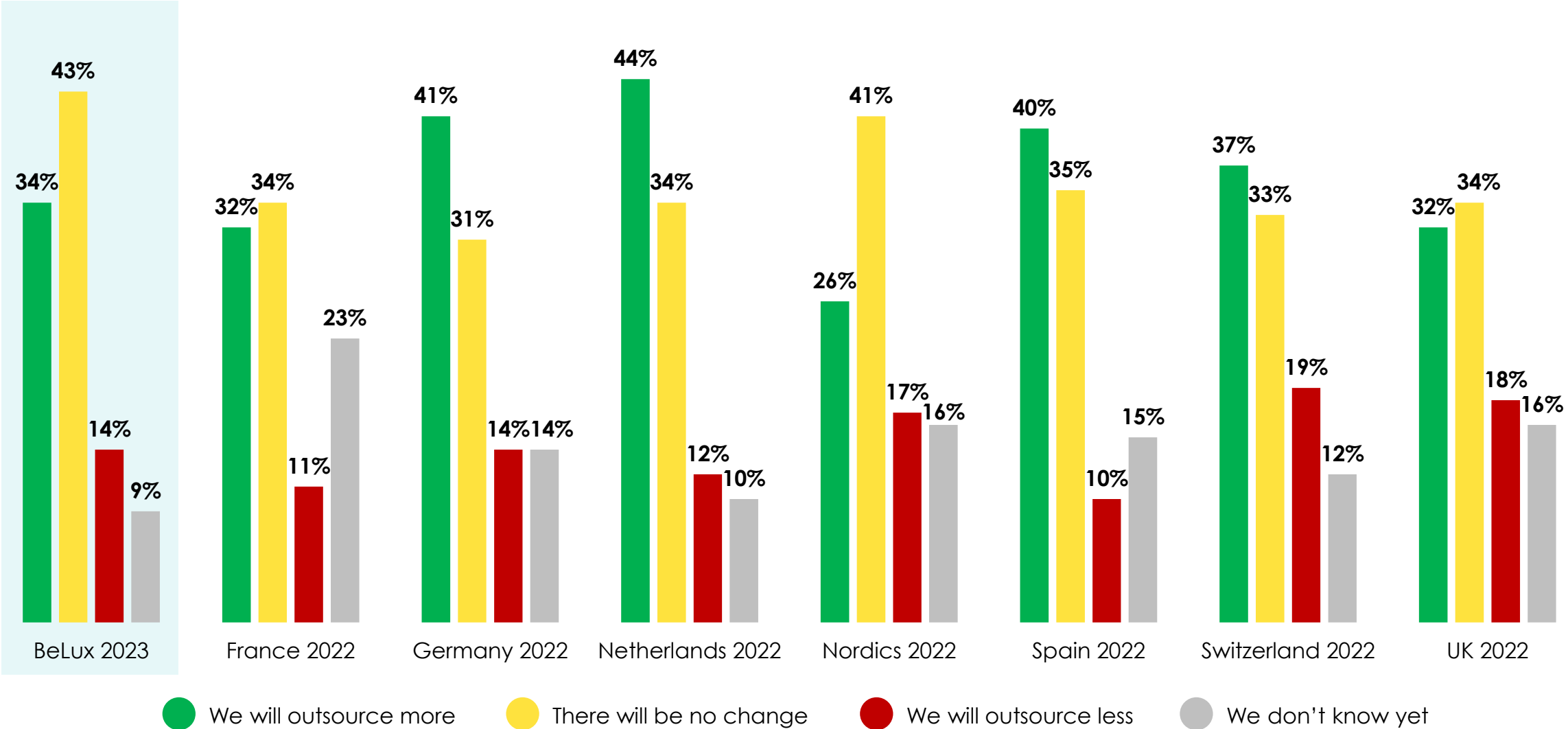
(By industry – comparison with 2022)



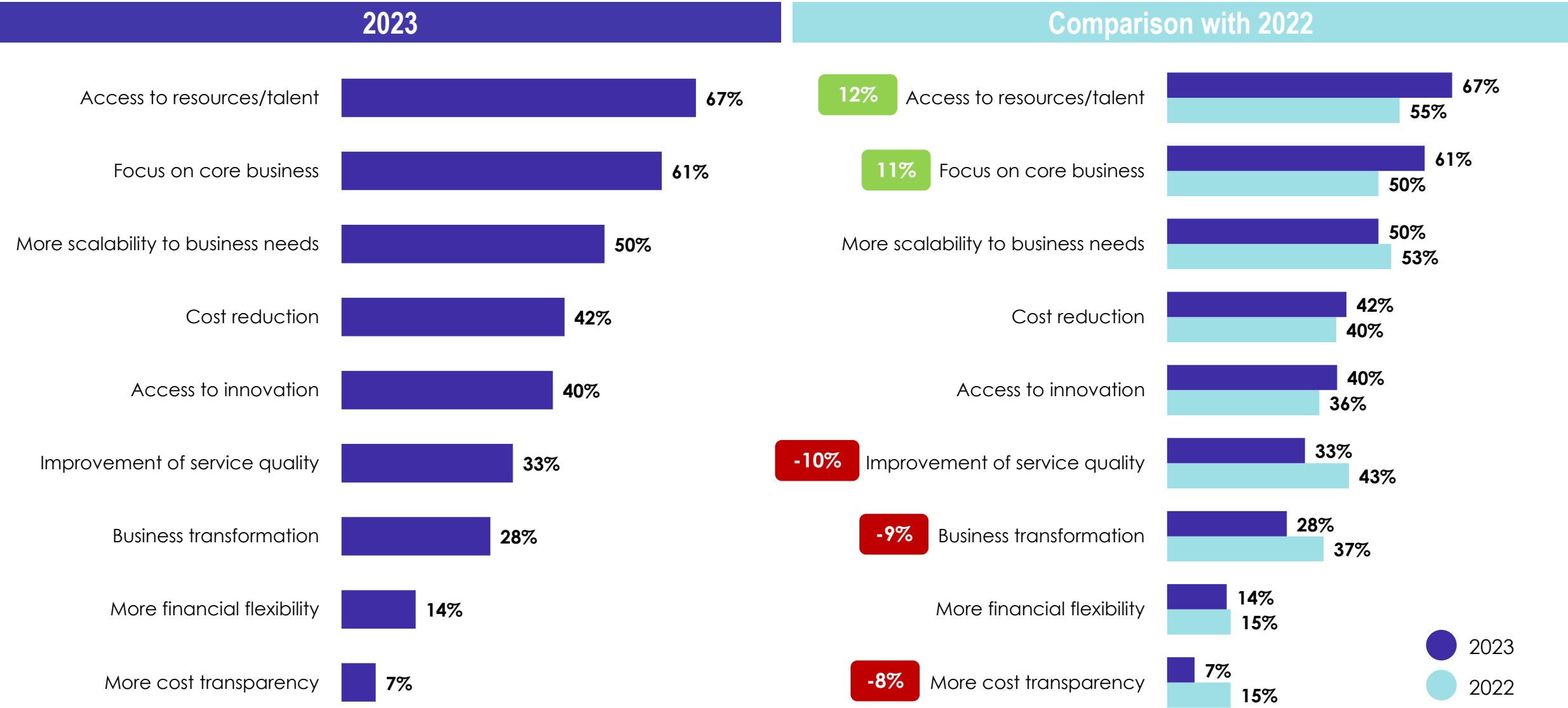
What kind of IT processes is your organization currently outsourcing and considering to outsource (more)?



What are your organization's plans for the next two years with regard to outsourcing? (By country/region)



What are the reasons your organization is planning to outsource more?

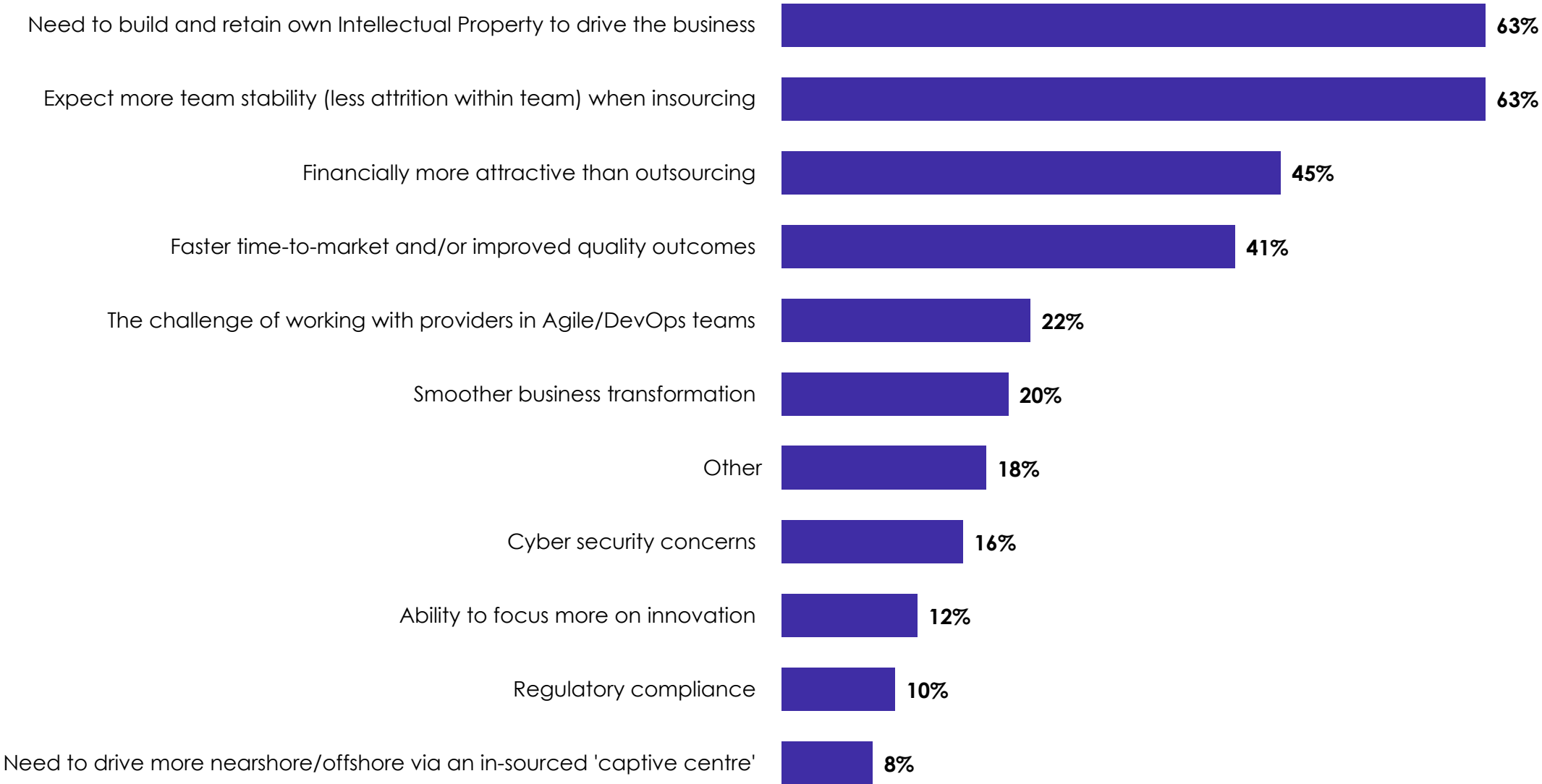


What are the reasons your organization is planning to outsource more? (By industry)

02
IT sourcing
trends

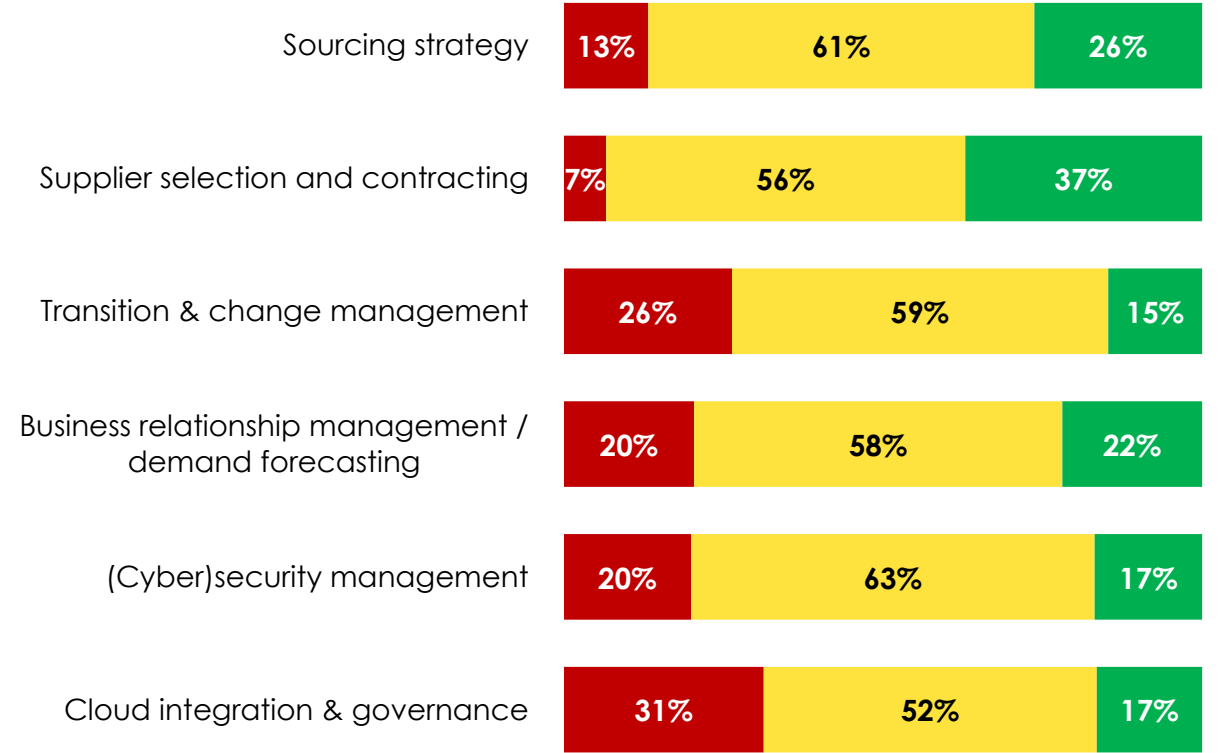
Industry	Access to resources/ talent	Focus on core business	More scalability to business needs	Cost reduction	Access to innovation	Improvement of service quality	Business transformation	More financial flexibility	More cost transparency
Financial Services	54%	38%	29%	33%	38%	38%	17%	4%	8%
Manufacturing, Chemicals, Consumer Goods & Pharmaceutical	47%	53%	44%	44%	31%	28%	31%	9%	3%
Public Sector	59%	45%	41%	41%	32%	14%	18%	5%	0%
Other	58%	56%	44%	22%	31%	25%	19%	22%	8%

What factors are driving less outsourcing?



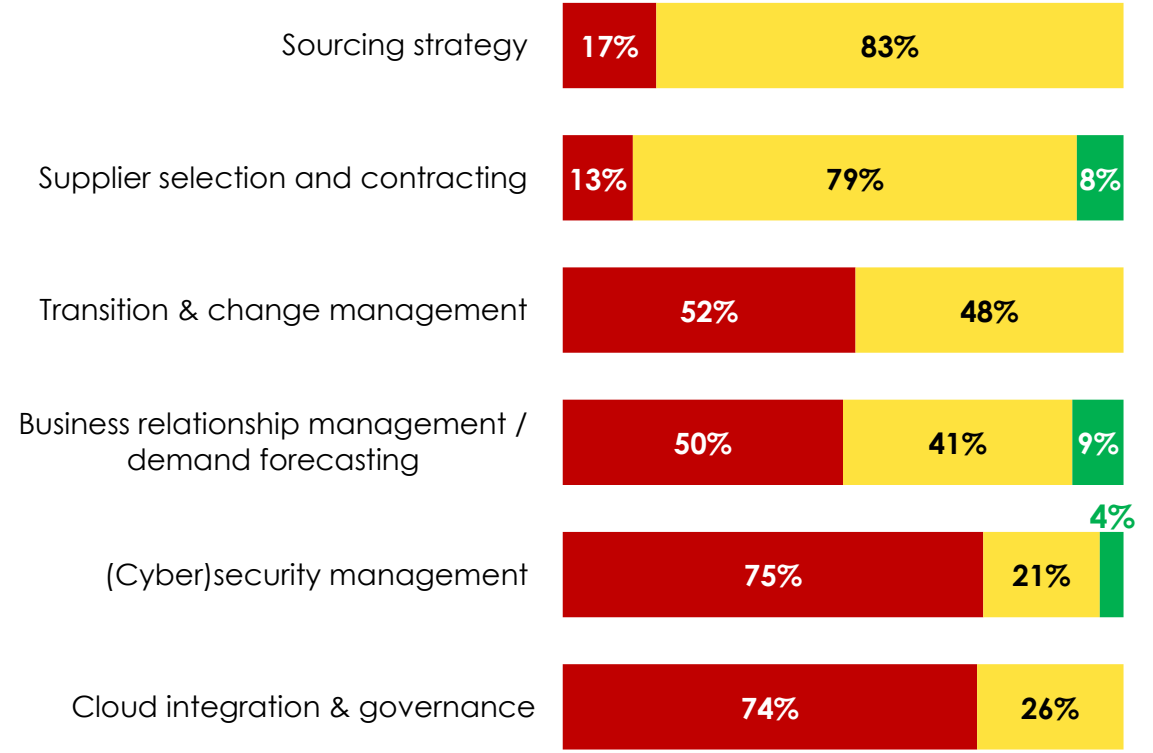
Client perspective

With regard to your own organisation, how much improvement is required for the following governance capabilities?



Service provider perspective

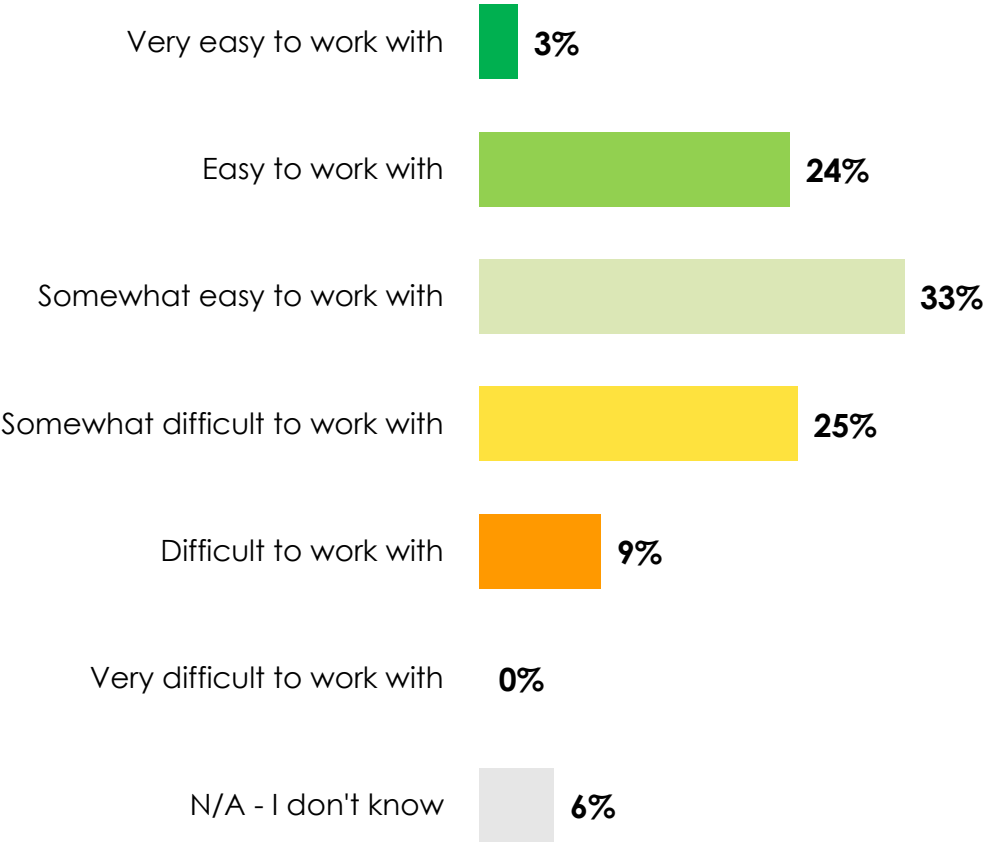
Overall, how much improvement is required by your clients for the following governance capabilities?



● Very significant improvement required ● Moderate improvement required ● No improvement required

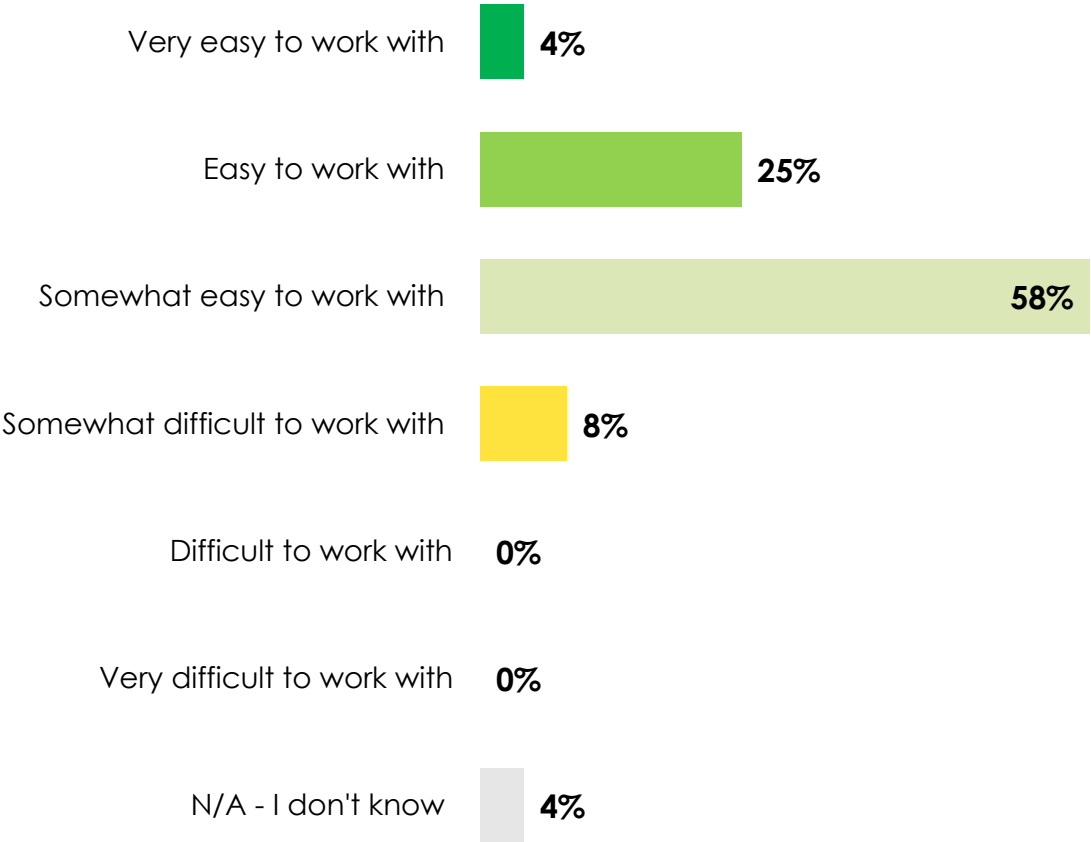
Client perspective

How would your supplier rate you as a customer in terms of easiness of working with?



Service provider perspective

Overall, how easy are your clients to work with?



Top 5 client IT investment areas in the next two years

1



Increase security, resilience
and/or cyber defence

2



Further automate business
processes

3



Migrate core business
applications to the cloud

4



Save costs

5



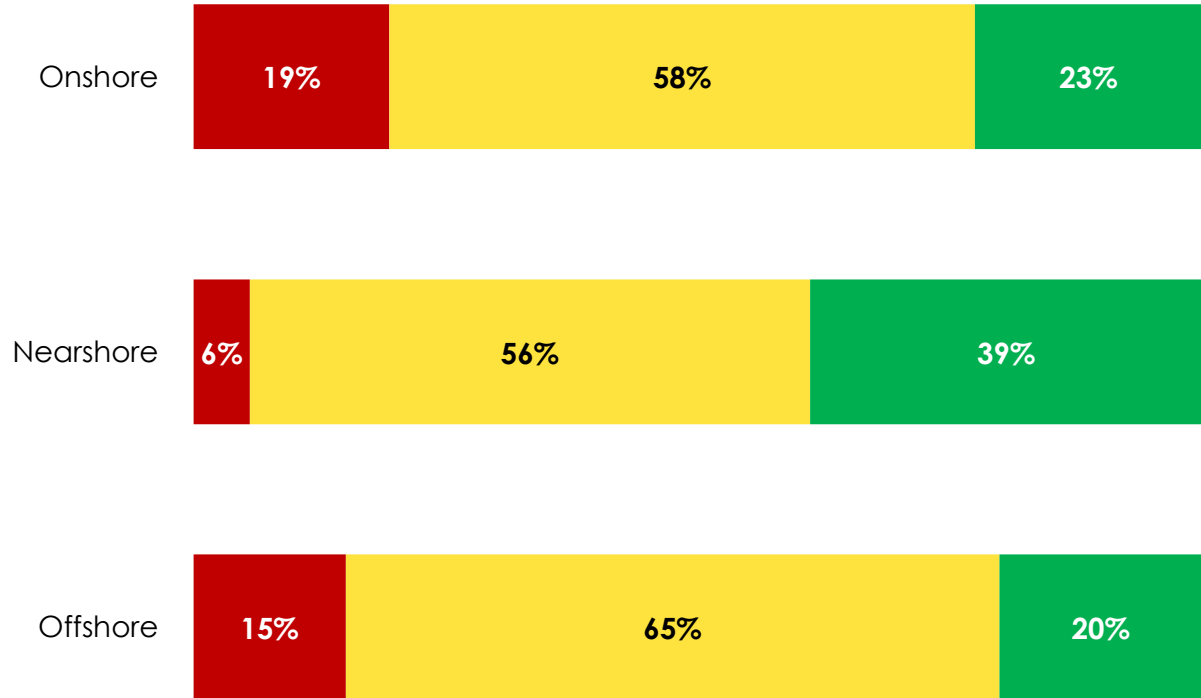
Further develop/acquire
solutions and services to get
more out of (big) data

Top 3 client IT investment areas in the next two years (By industry)

Financial Services			Manufacturing, Chemicals, Consumer Goods & Pharmaceuticals		Public Sector		Other		
1	Increase security, resilience and/or cyber defence	<div><div></div></div> 67%	Increase security, resilience and/or cyber defence	<div><div></div></div> 70%	Increase security, resilience and/or cyber defence	<div><div></div></div> 69%	Increase security, resilience and/or cyber defence	<div><div></div></div> 64%	
	2	Further automate business processes	<div><div></div></div> 52%	Further automate business processes	<div><div></div></div> 54%	Further automate business processes	<div><div></div></div> 62%	Further automate business processes	<div><div></div></div> 47%
	3	Migrate core business applications to the cloud	<div><div></div></div> 48%	Migrate core business applications to the cloud	<div><div></div></div> 45%	Save costs	<div><div></div></div> 39%	Migrate core business applications to the cloud	<div><div></div></div> 46%

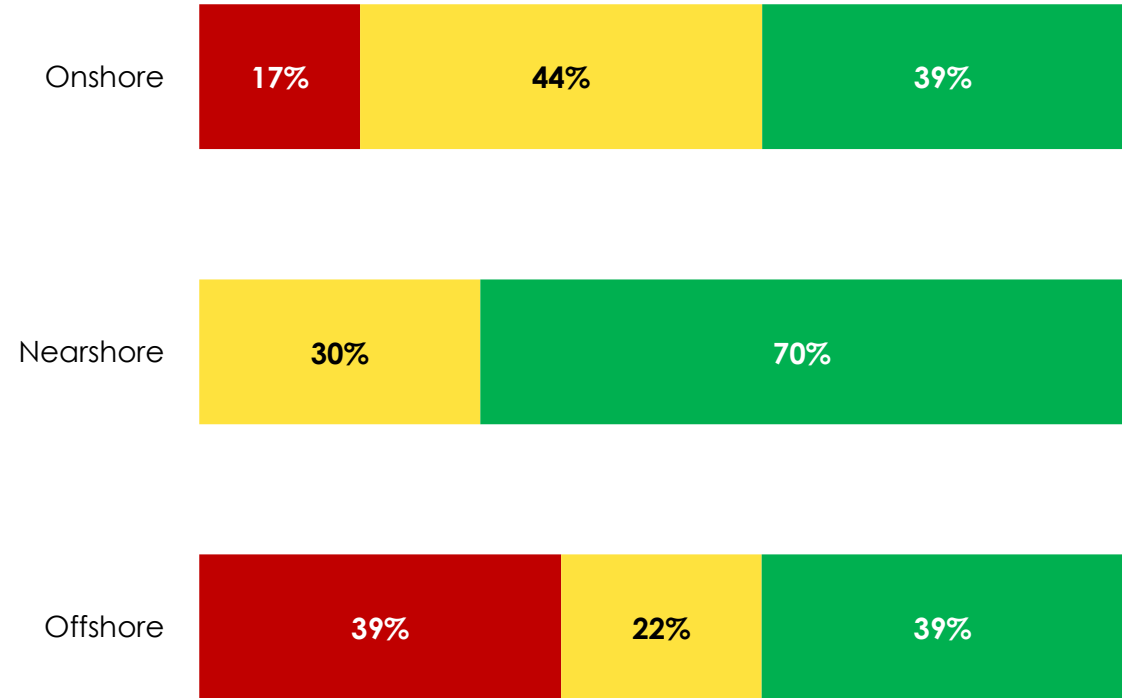
Client perspective

In what way are you thinking of changing the mix of your outsourcing delivery model?



Service provider perspective

In what way are your clients changing the mix of their outsourcing delivery model?



It will decrease

No change

It will increase



03

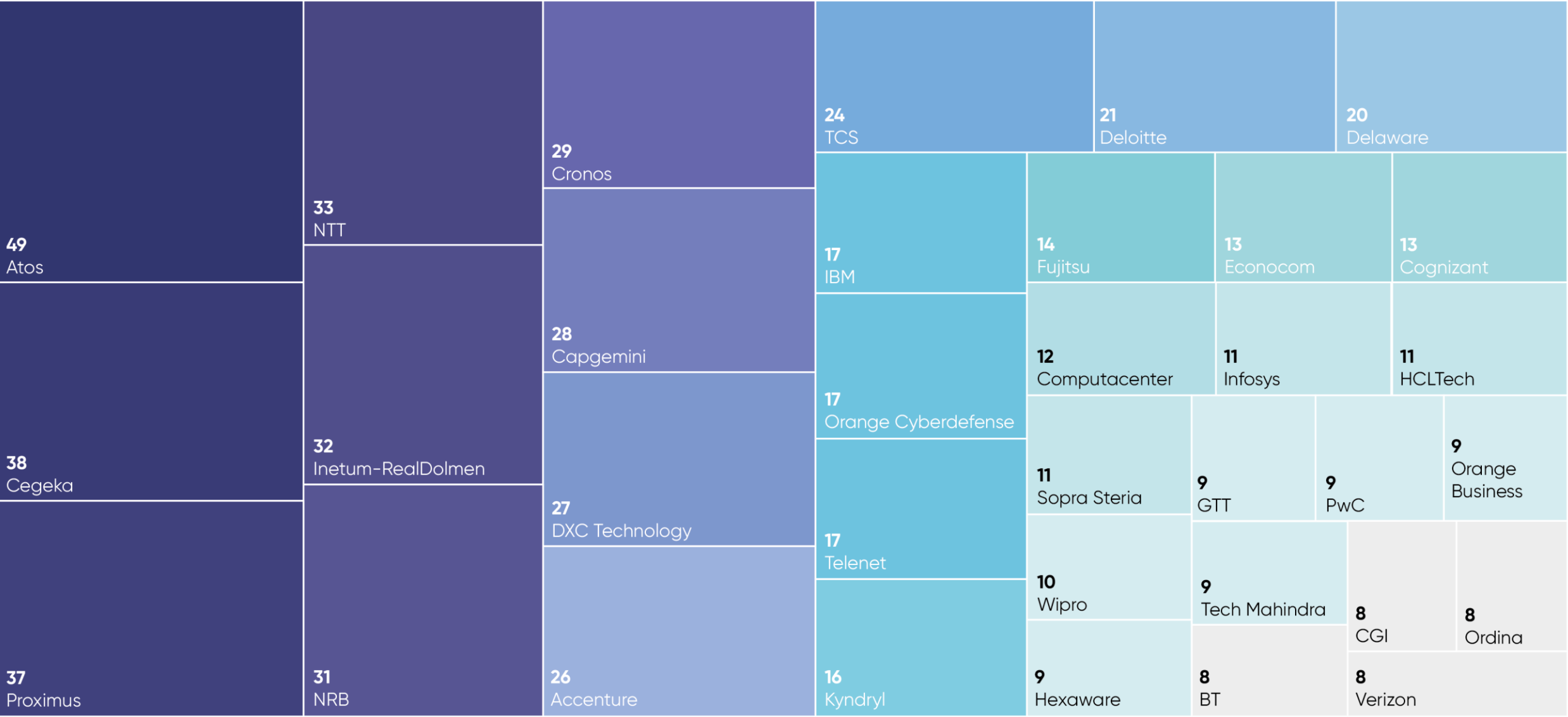
IT service provider performance

General satisfaction

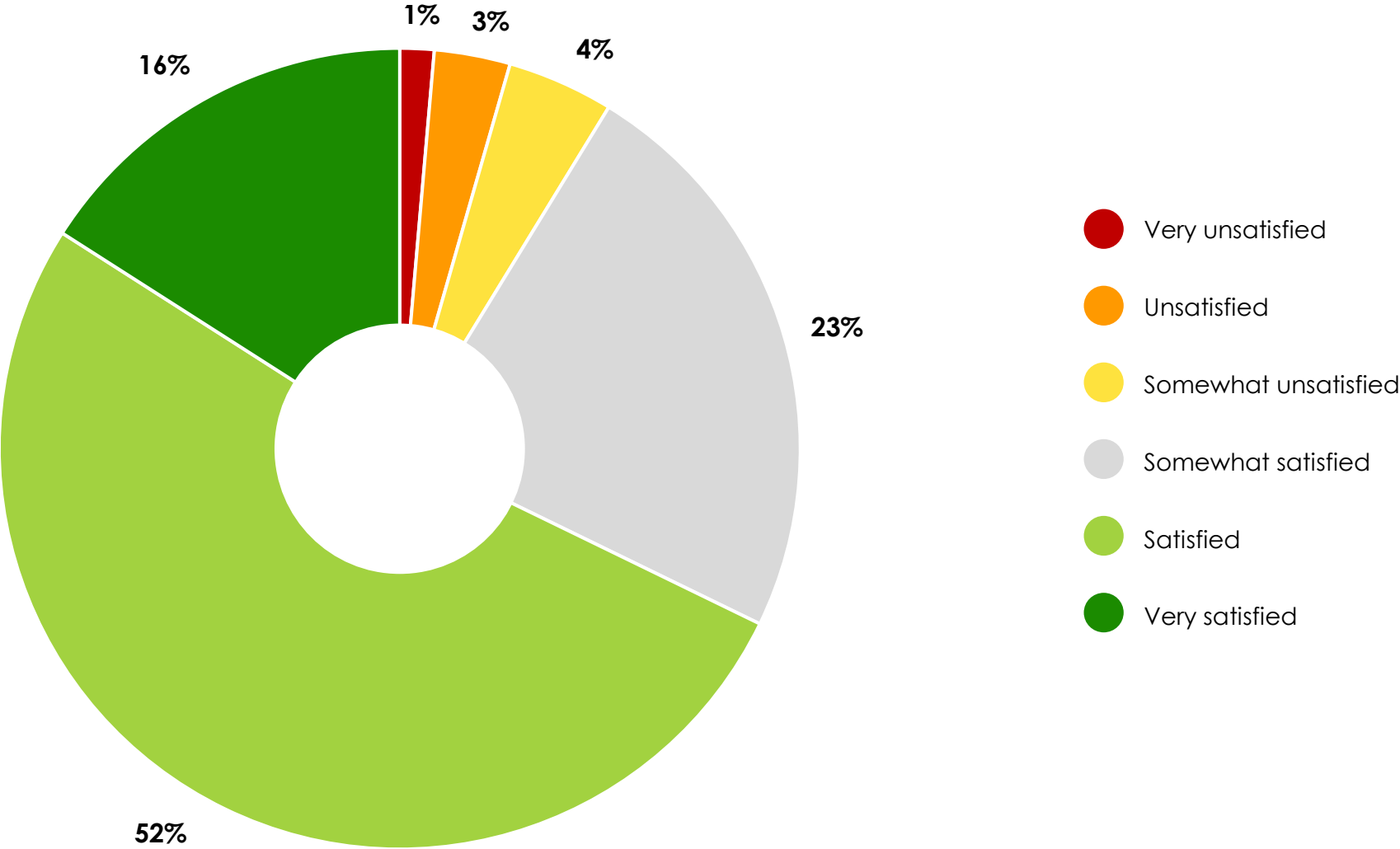
Number of IT sourcing relationships evaluated

More than 650 IT sourcing relationships have been evaluated, enabling us to rank the top 34 IT sourcing providers in the BeLux region

03
General
satisfaction



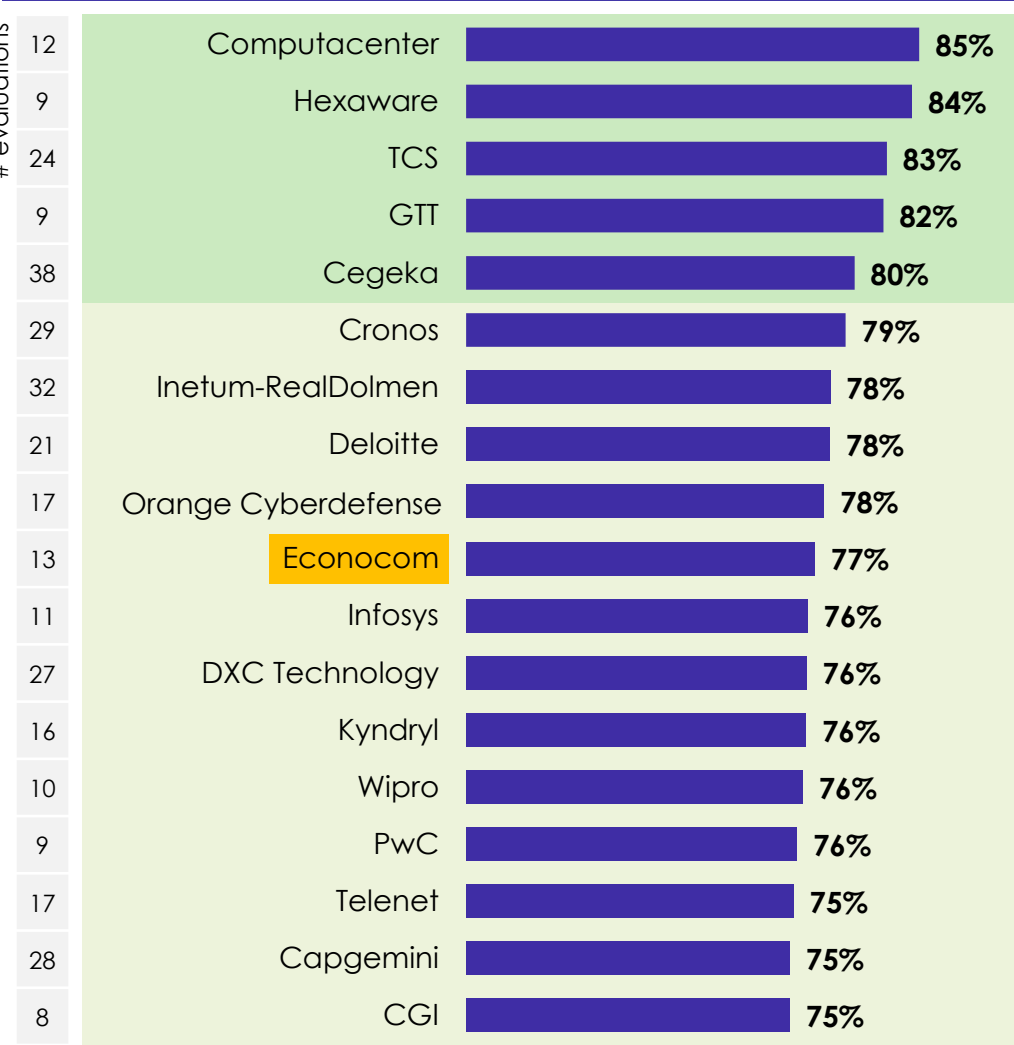
General satisfaction across all IT sourcing relationships (Overall)



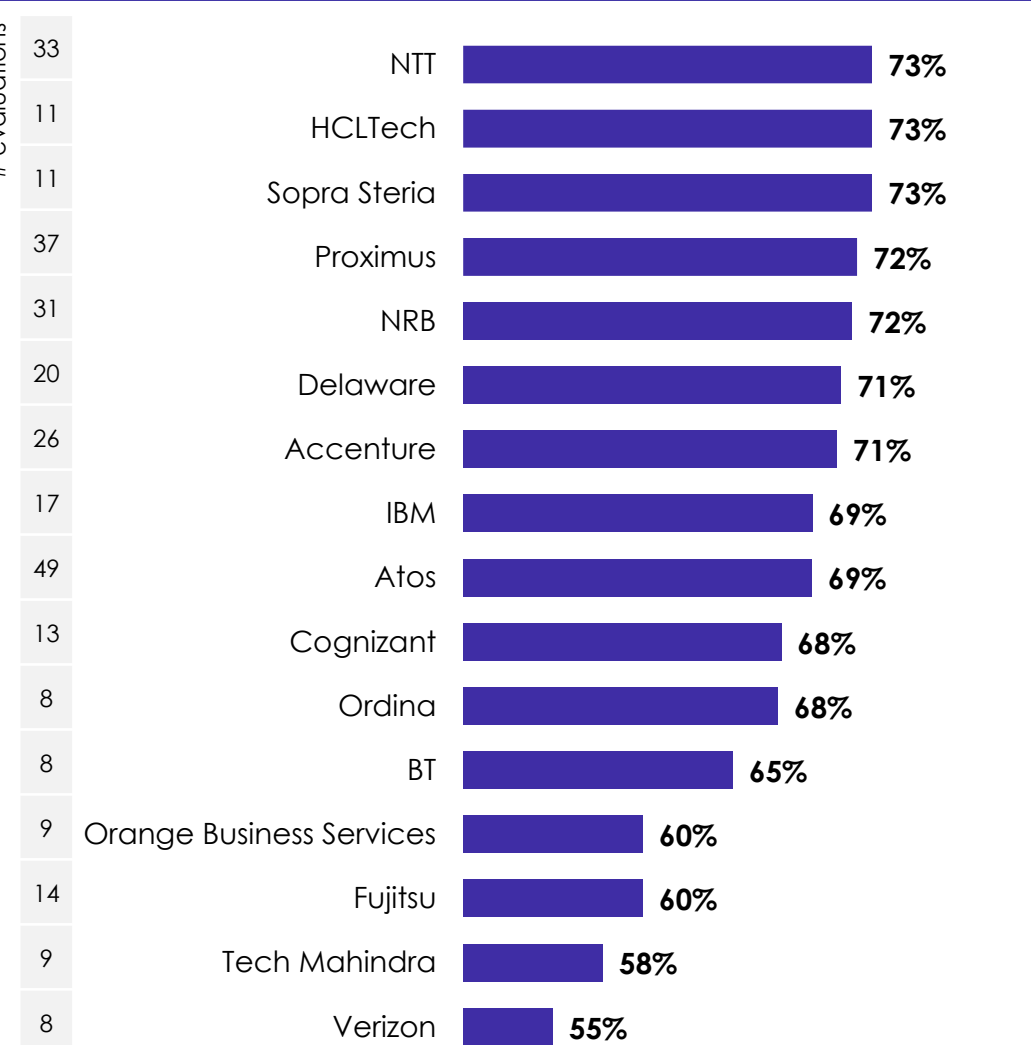
N=652

General satisfaction with service providers: BeLux 2023

2023 Ranking: Providers 1-18



2023 Ranking: Providers 19-34



Exceptional performers

The ranking of these service providers is above the typical spread of the market (outside of the standard deviation).

Strong performers

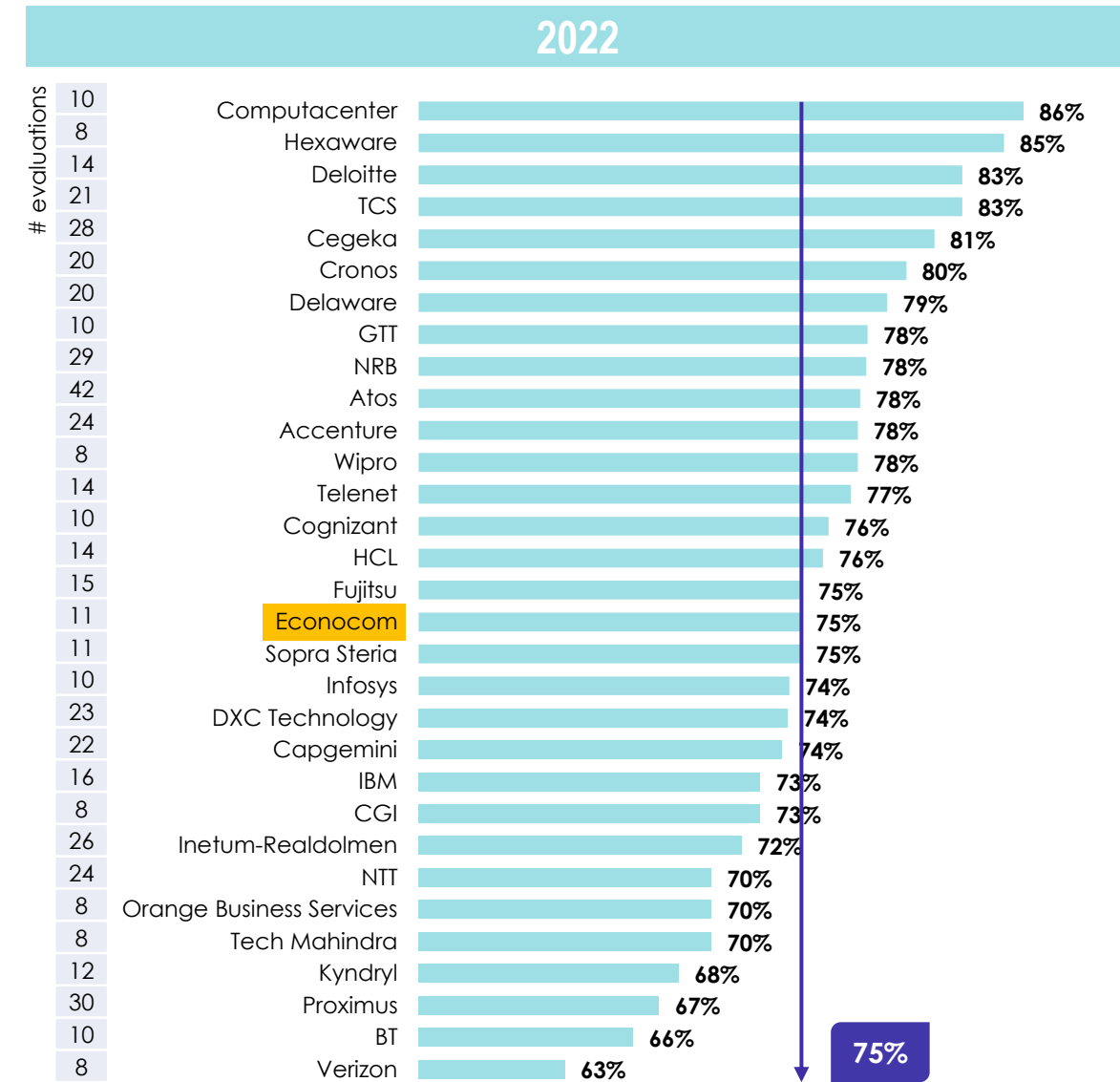
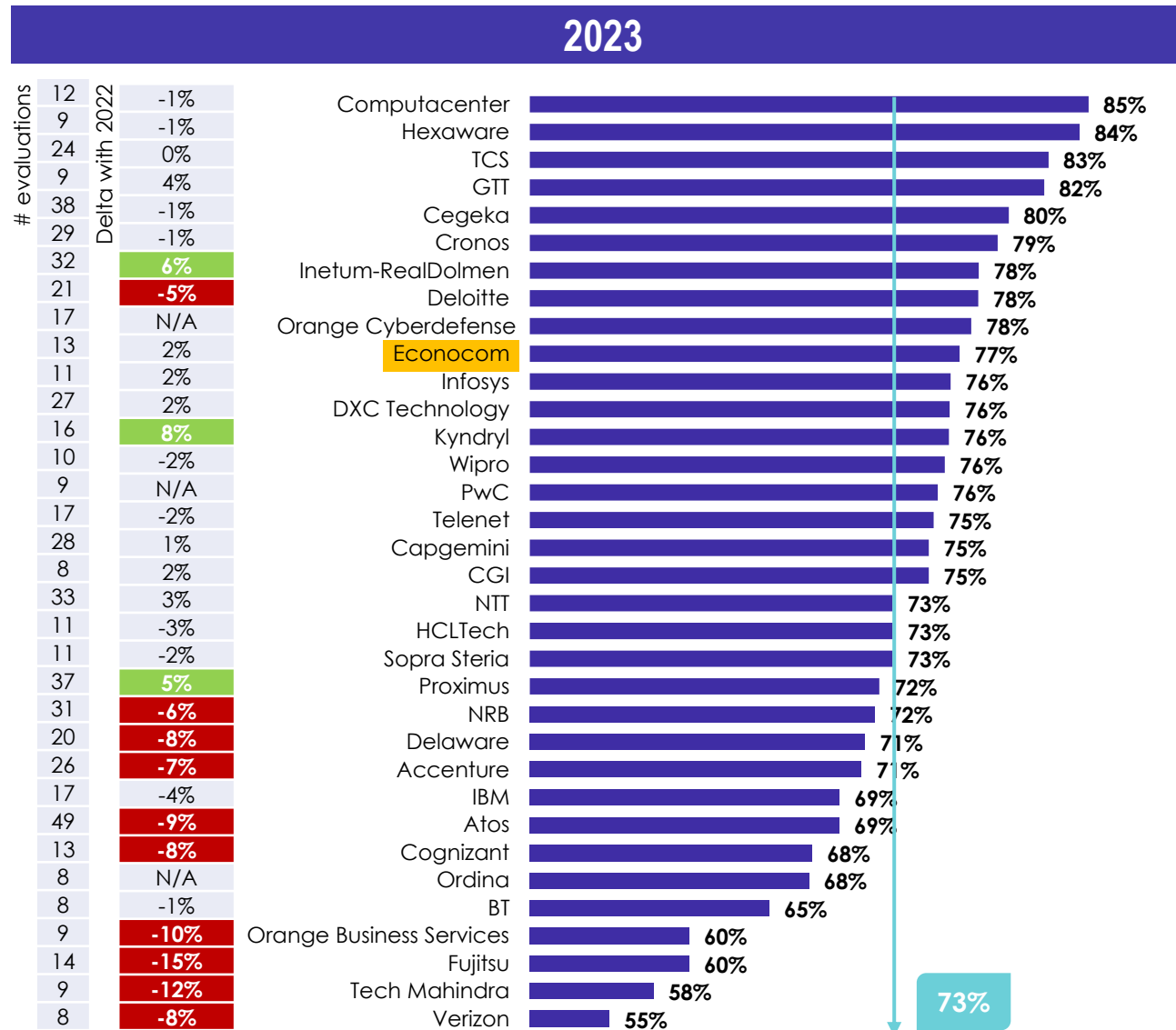
The ranking of these service providers is above the market average.

Average = 73%

KEY TO SCORES

Very unsatisfied	0%
Unsatisfied	20%
Somewhat unsatisfied	40%
Somewhat satisfied	60%
Satisfied	80%
Very satisfied	100%

General satisfaction with service providers: BeLux (Comparison with 2022)

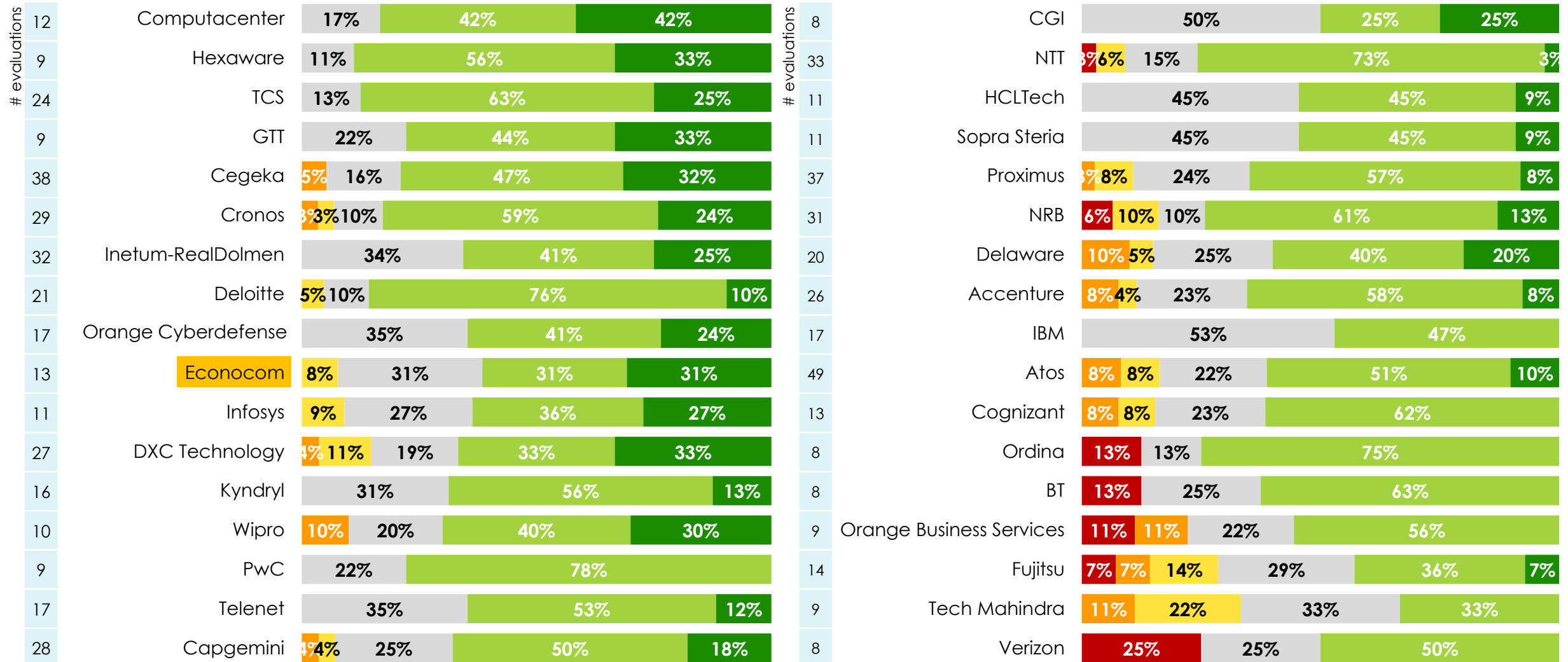


General satisfaction with service providers: BeLux

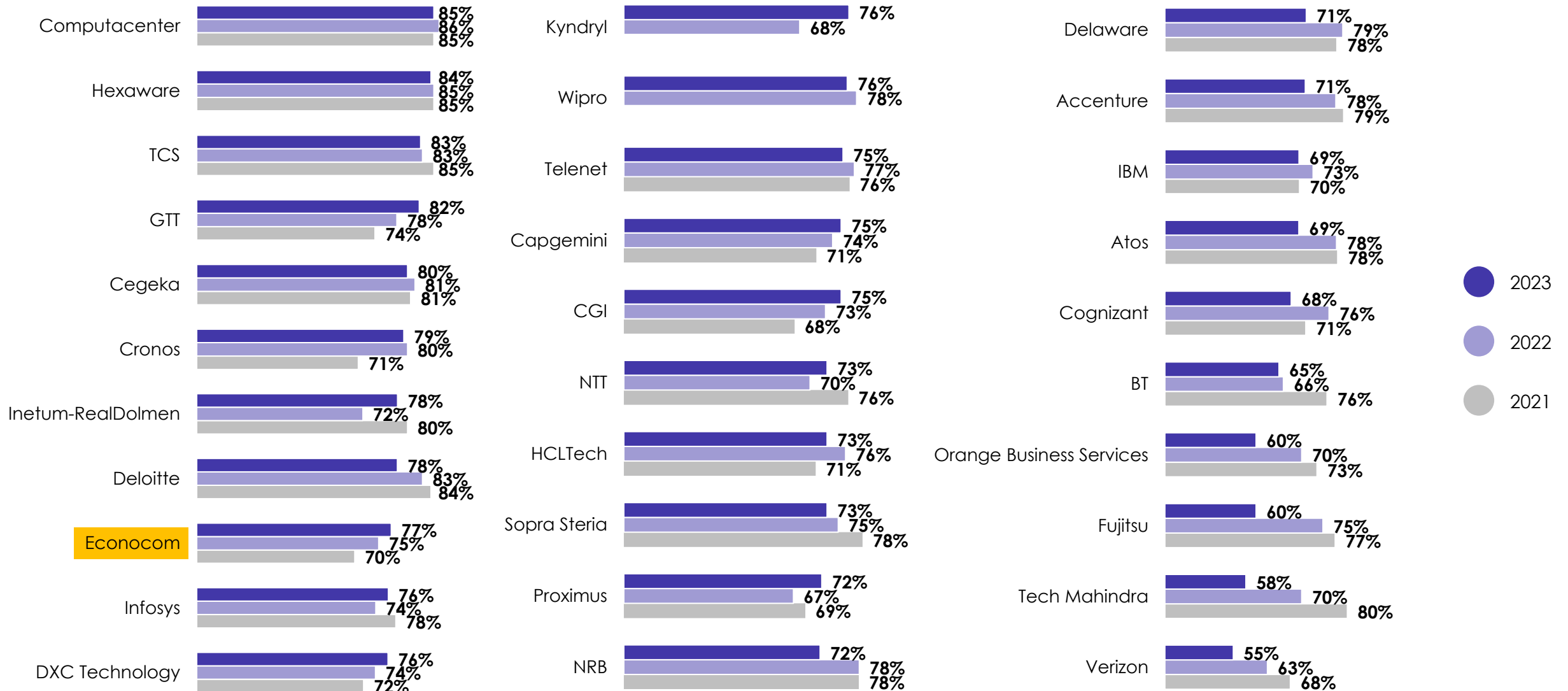
(Detailed satisfaction)

03
General
satisfaction

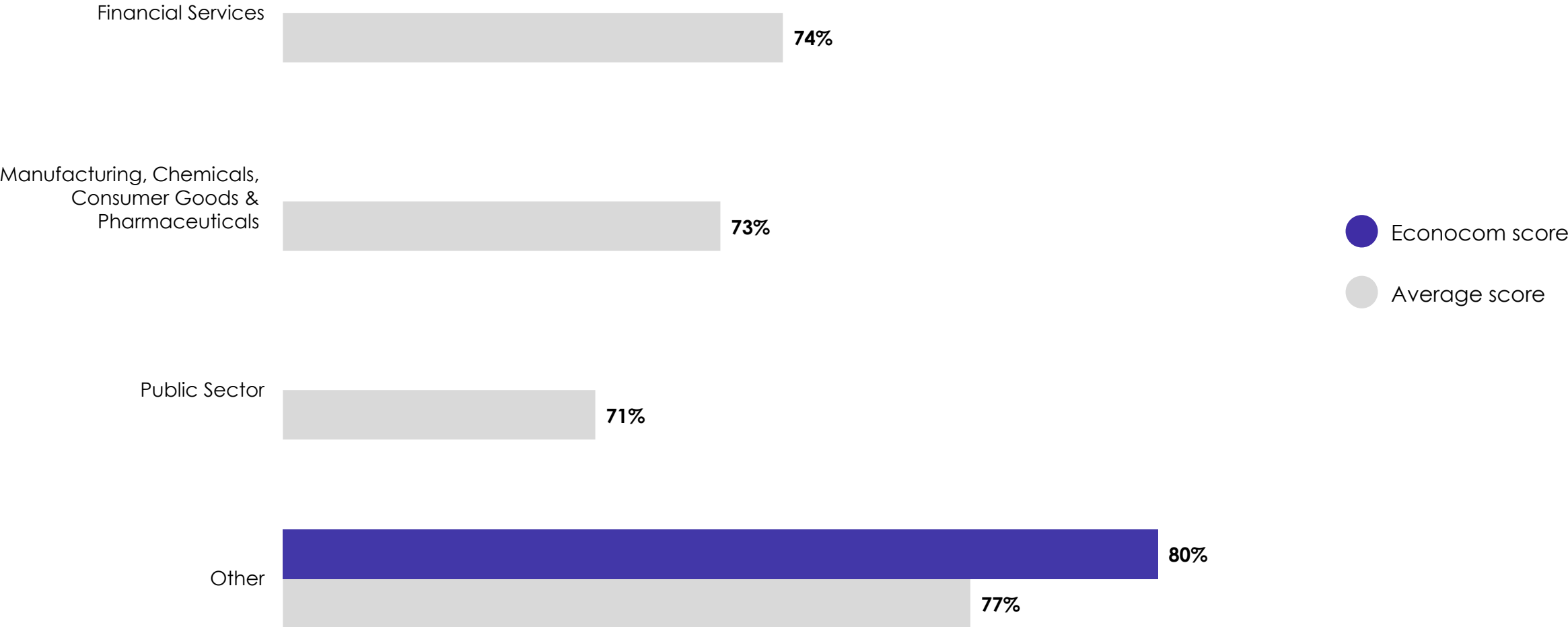
Very unsatisfied Unsatisfied Somewhat unsatisfied Somewhat satisfied Satisfied Very satisfied



General satisfaction with service providers: BeLux (Three-year comparison)

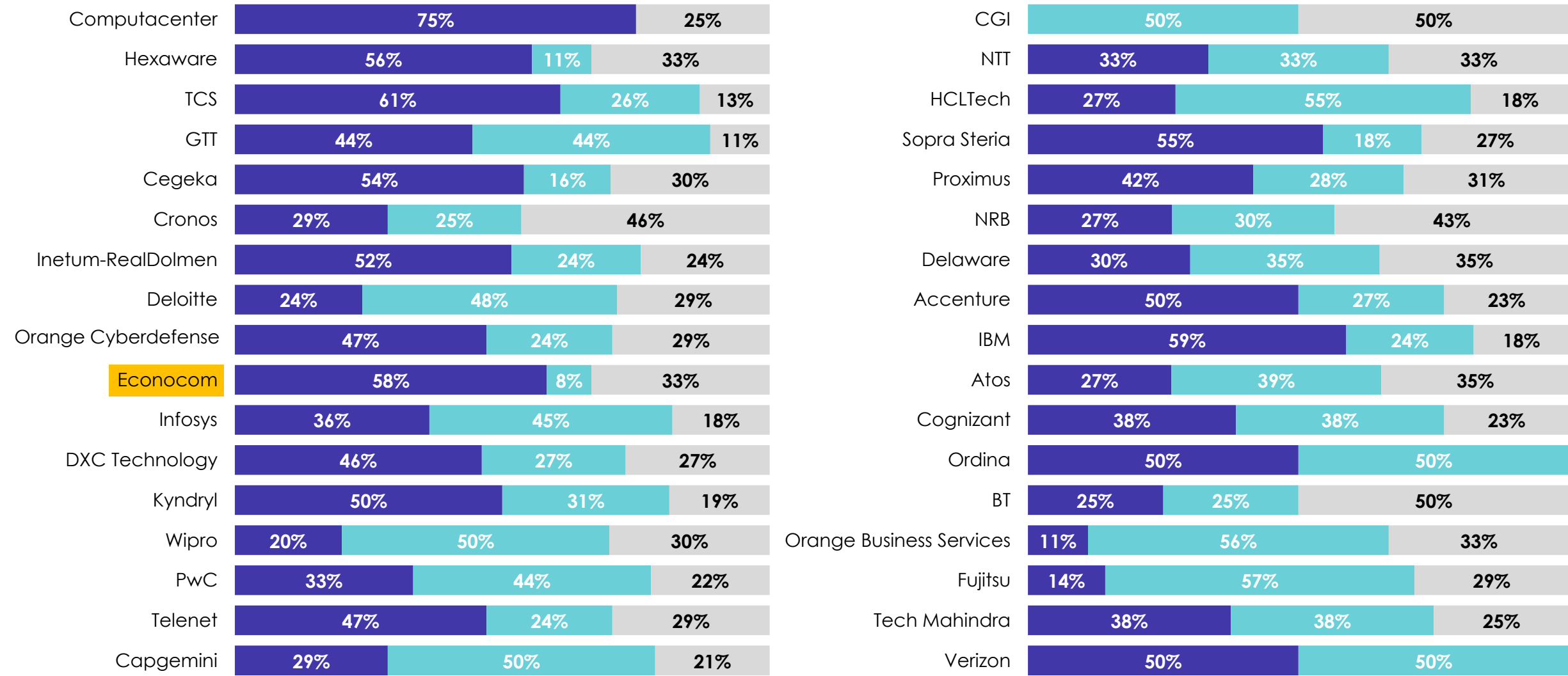


General satisfaction score per industry sector: Econocom BeLux



If you are working in the private sector, will you conduct the renewal process via negotiation with the existing vendor or run a competitive process?

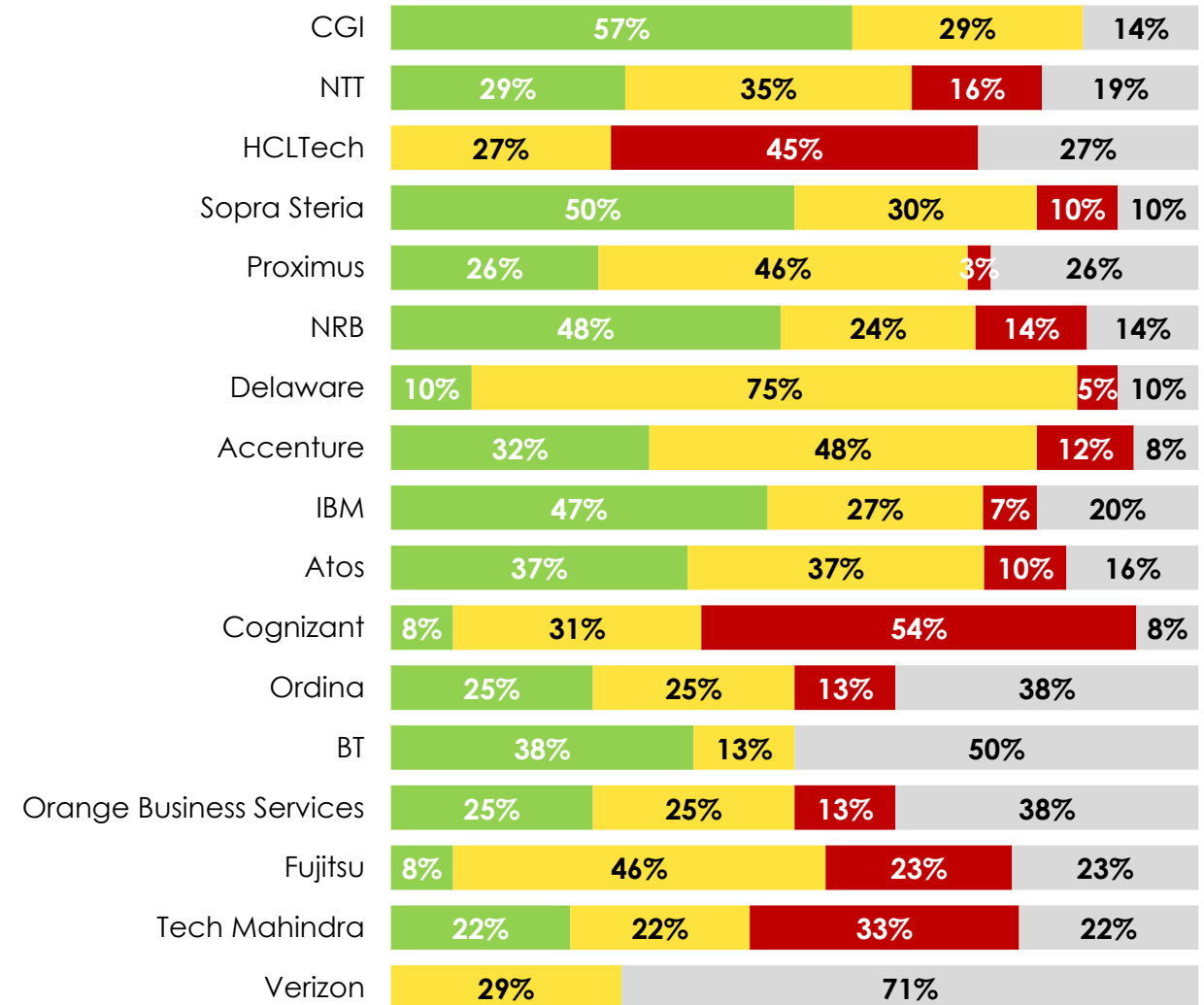
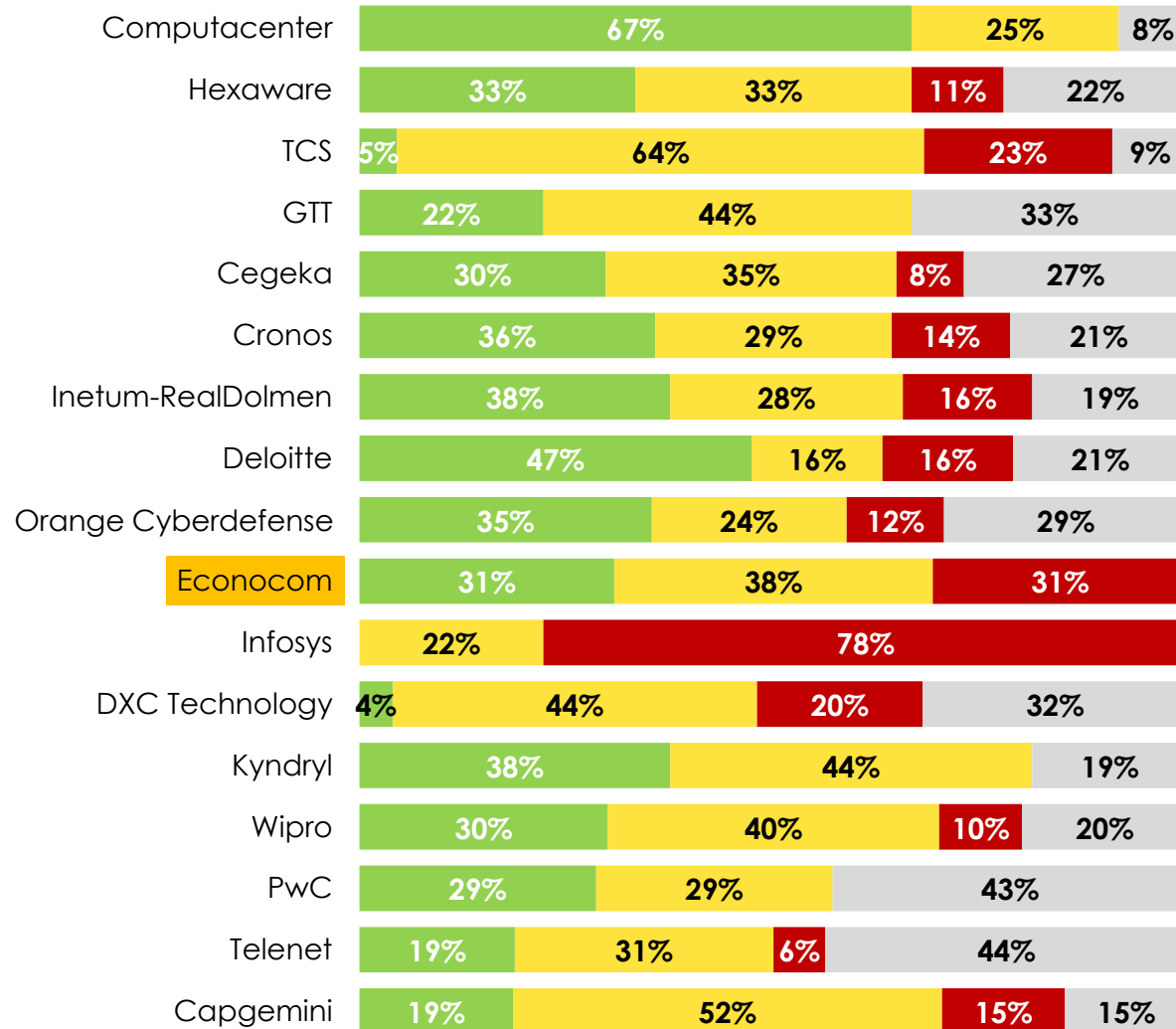
● First, negotiate with the existing vendor ● Directly run a competitive process ● N/A - I'm not sure



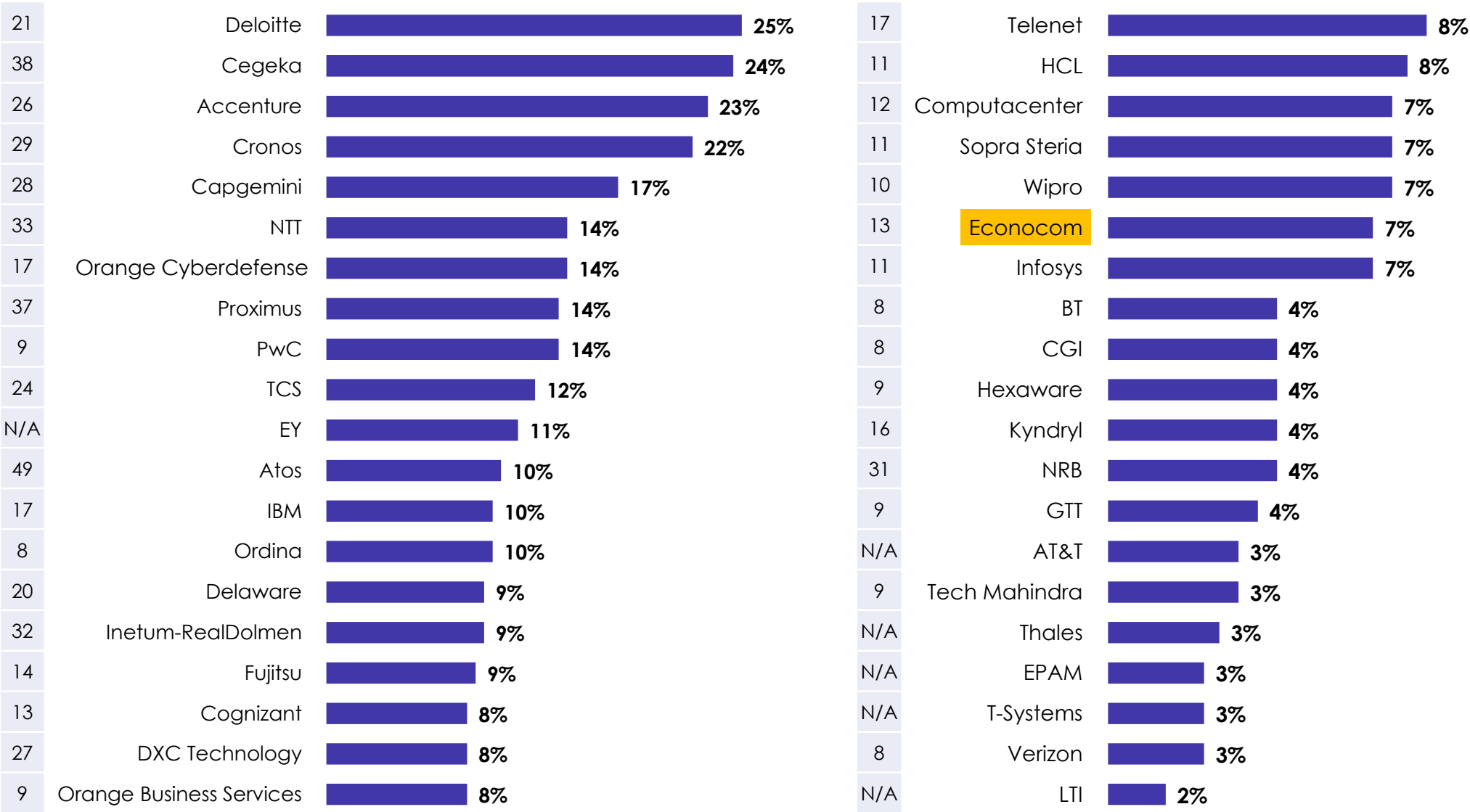
How would you characterize the attrition rates (turnover) with regard to the personnel of your service provider?

03
General
satisfaction

Low Medium High N/A - I'm not sure



Which service providers (that you are currently not using) would you consider doing business with in the future?



Top 5

- Deloitte
- Cegeka
- Accenture
- Cronos
- Capgemini

N=204



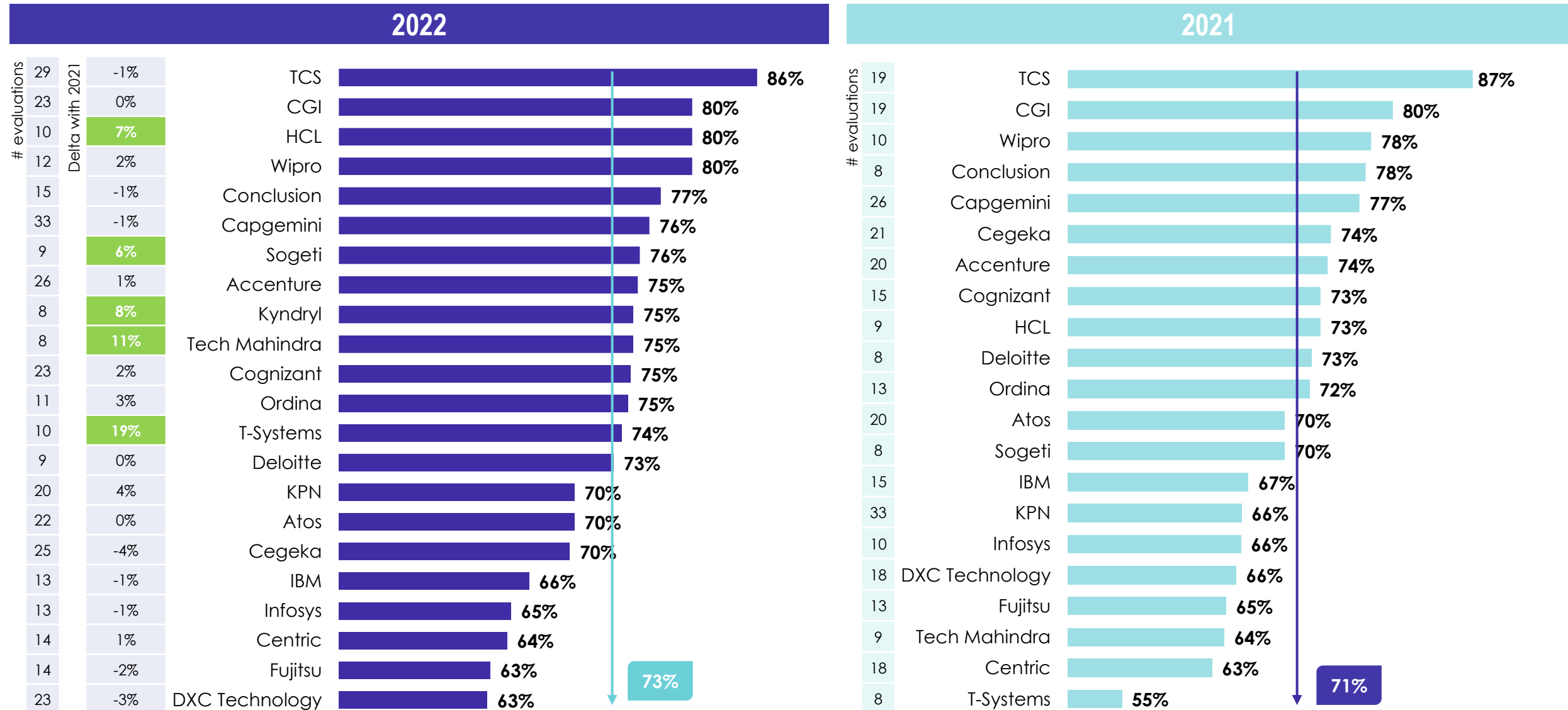
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IT service provider performance

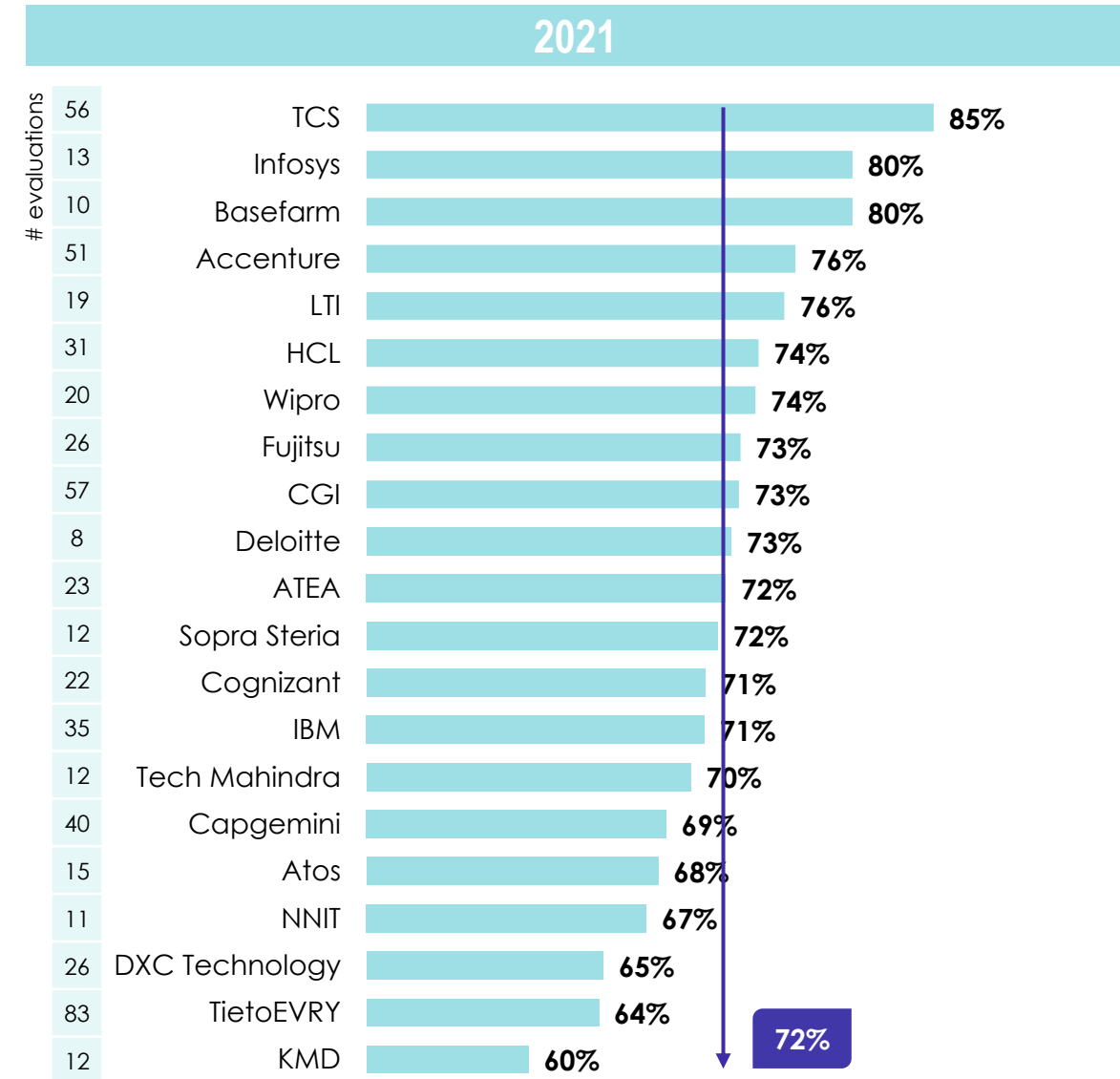
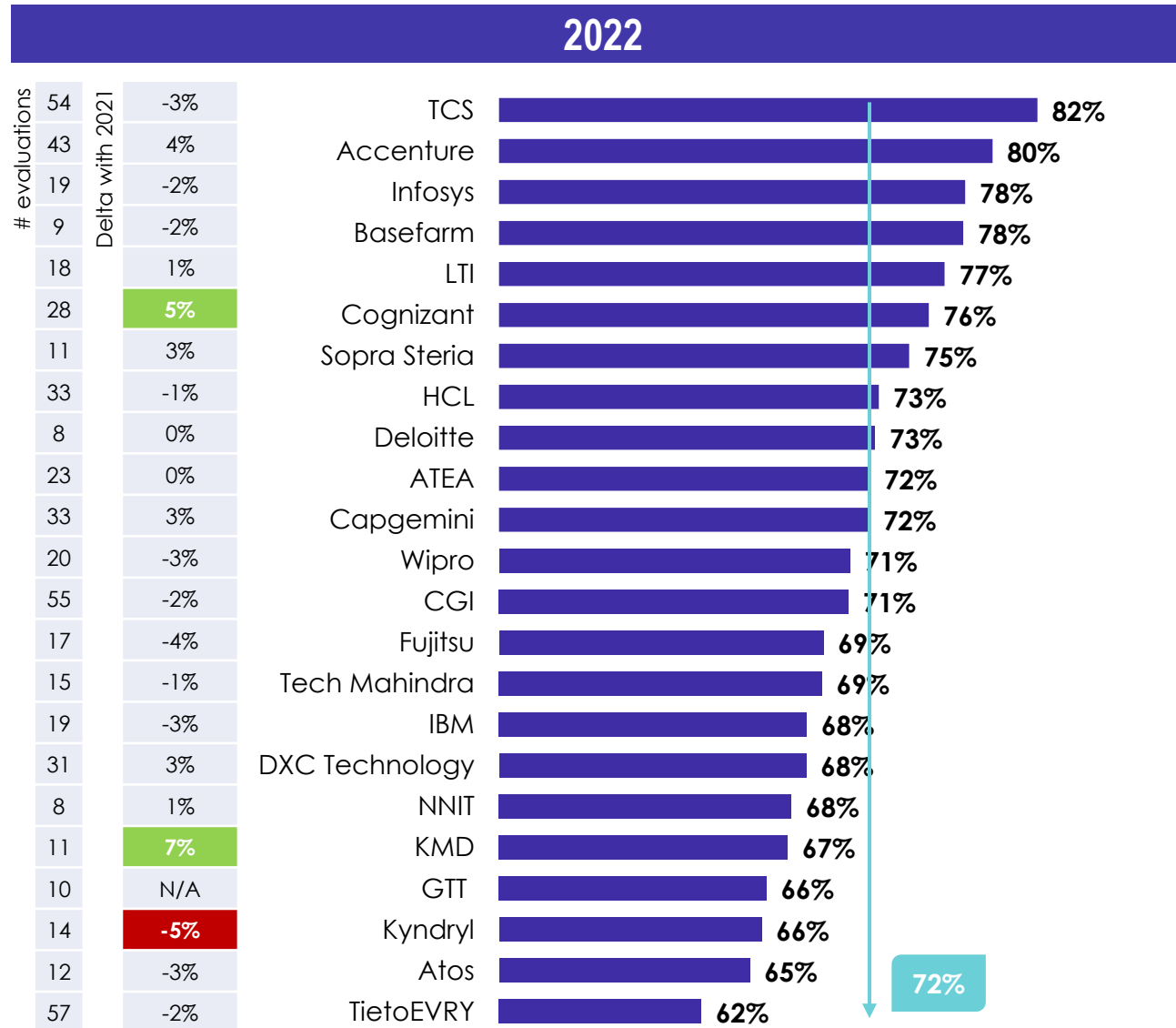
General satisfaction by country/region

General satisfaction with service providers: Netherlands

(Comparison with 2021)

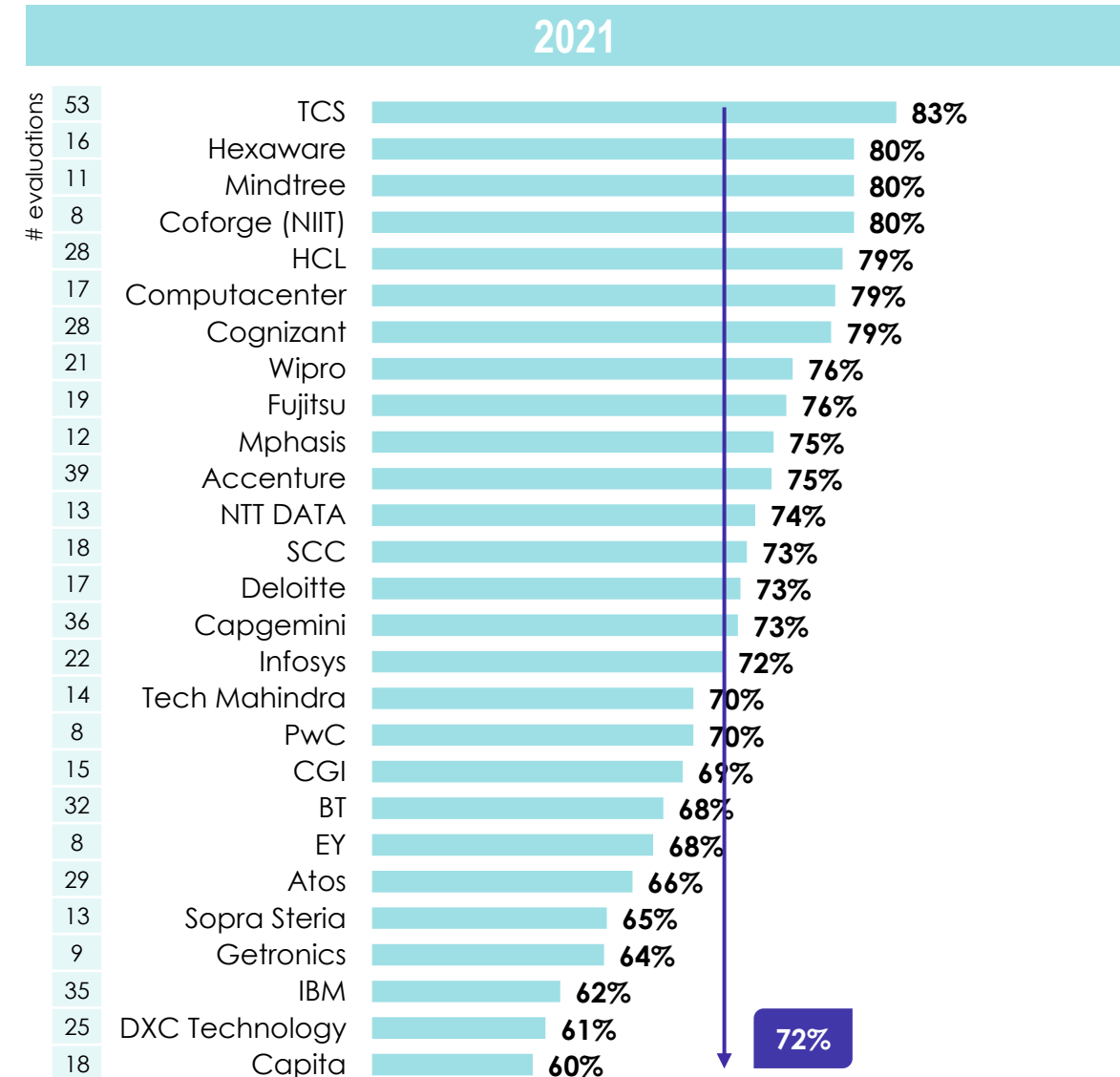
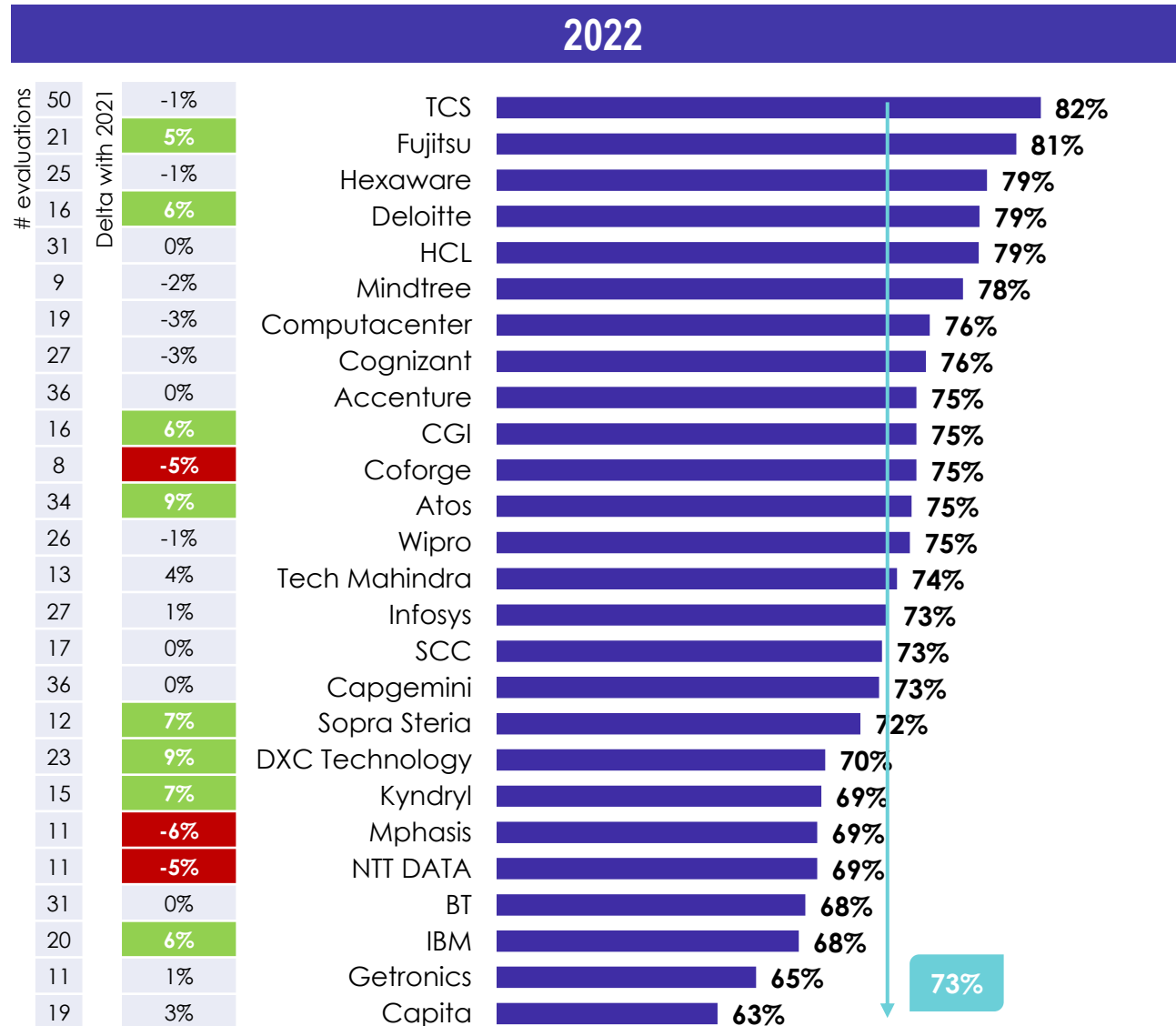


General satisfaction with service providers: Nordics (Comparison with 2021)



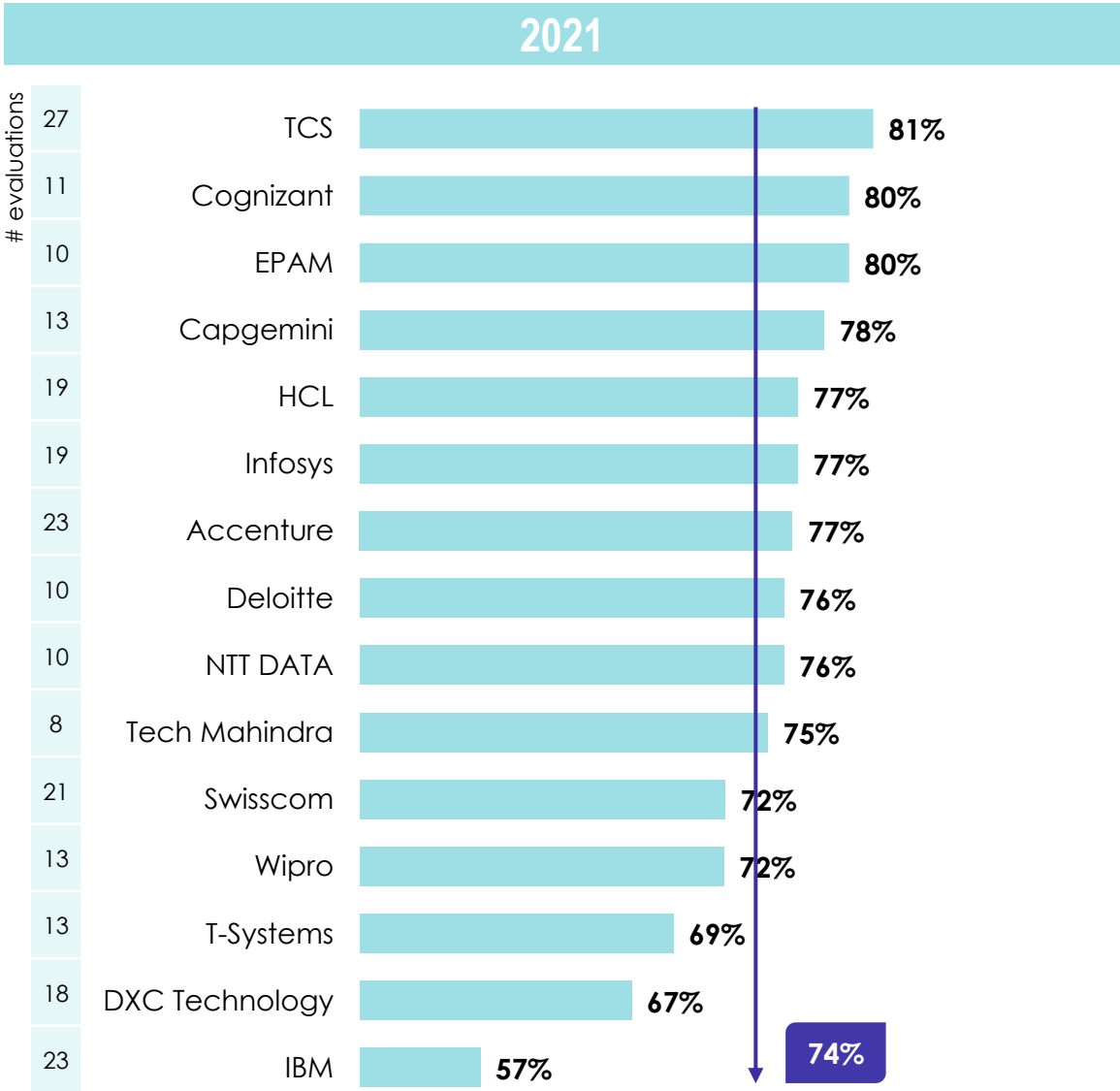
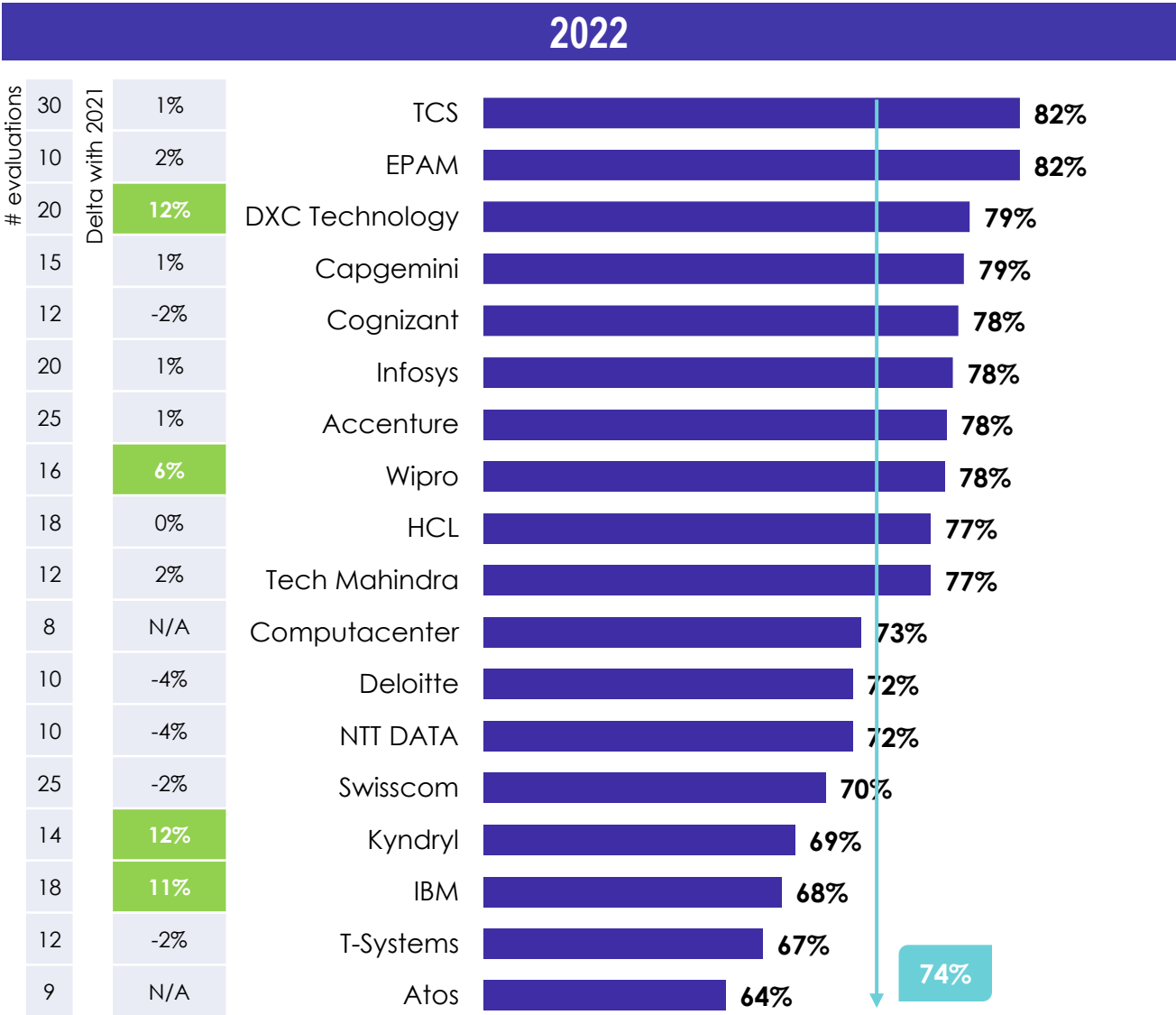
General satisfaction with service providers: United Kingdom

(Comparison with 2021)



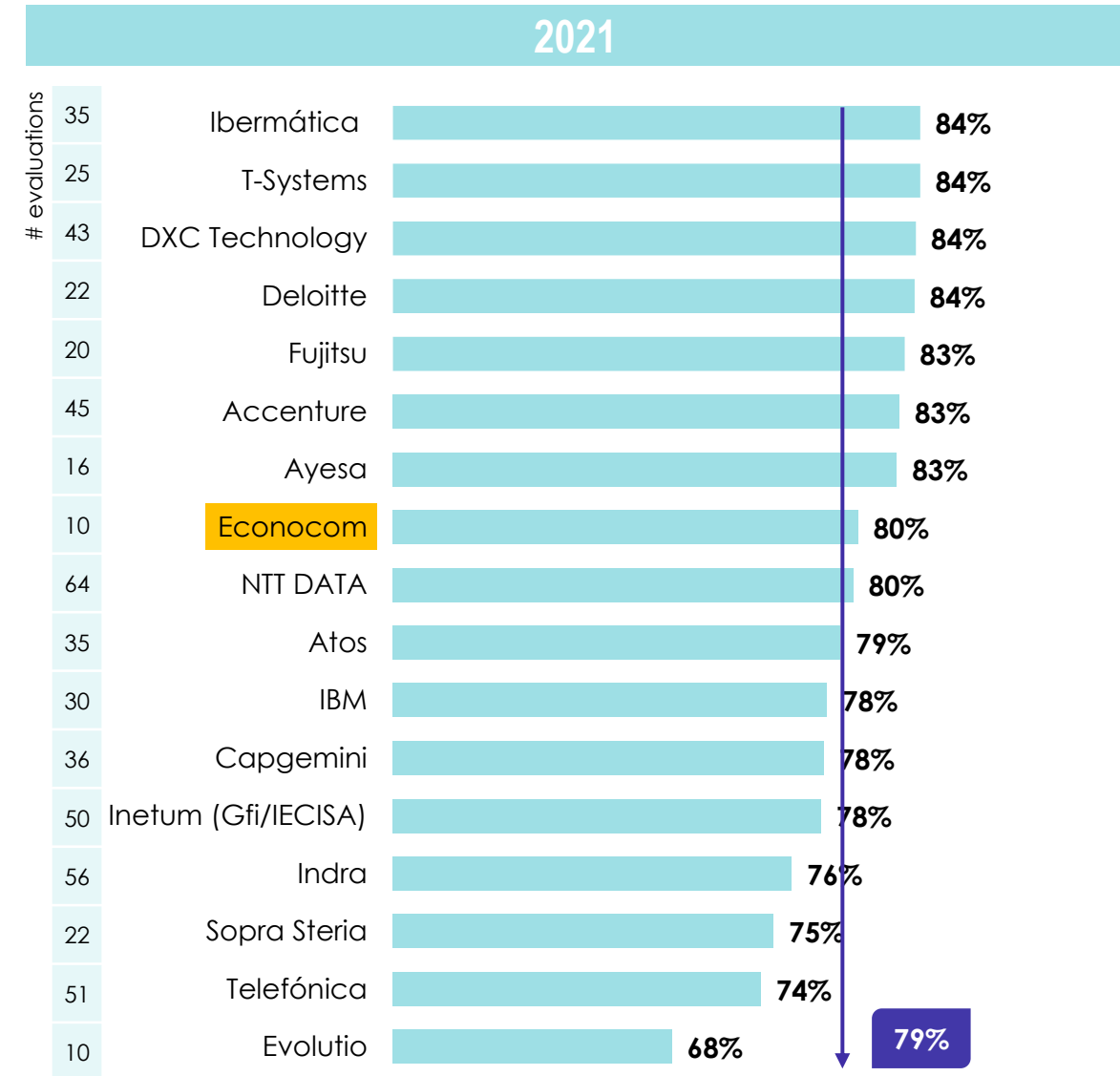
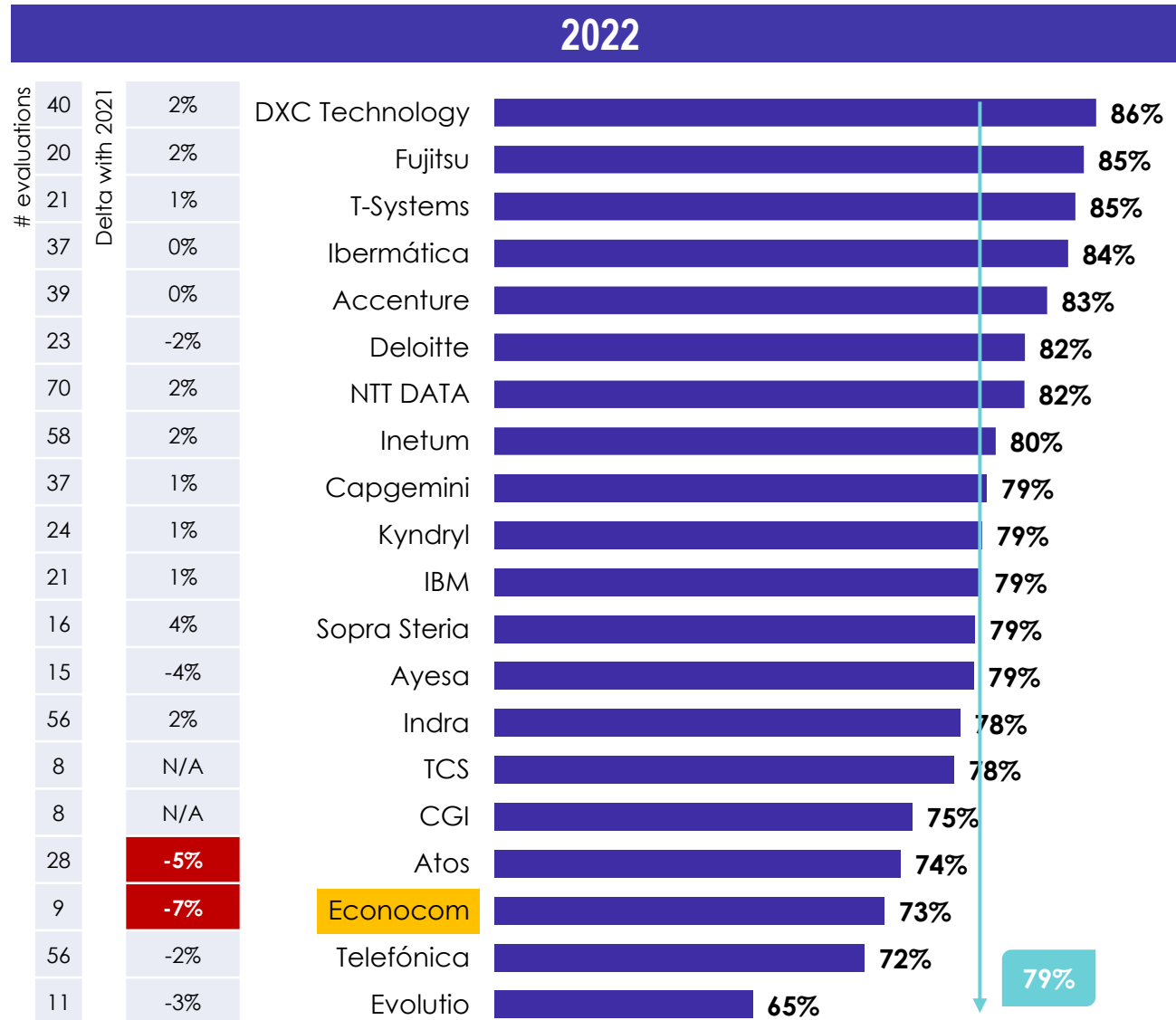
General satisfaction with service providers: Switzerland

(Comparison with 2021)



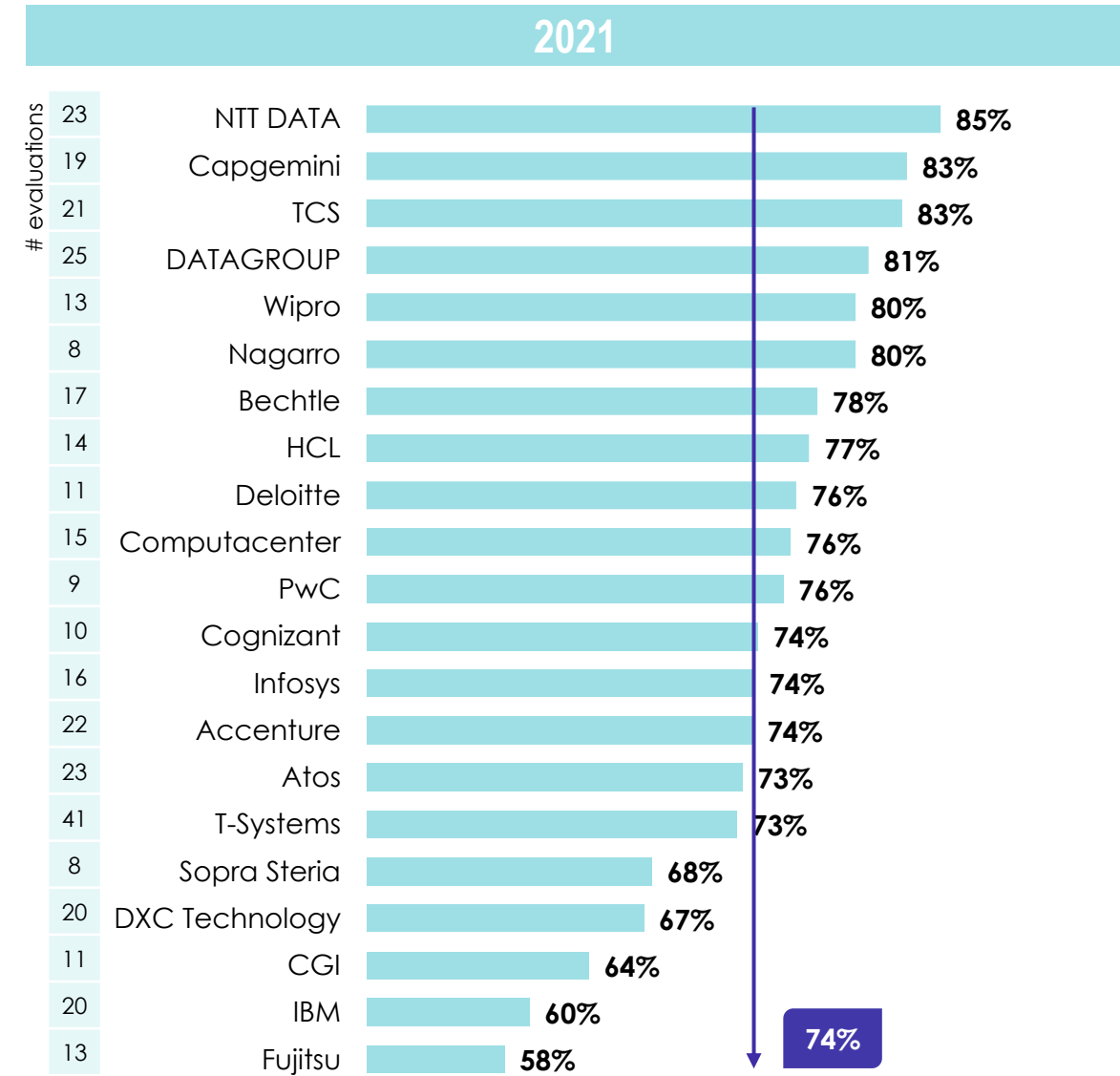
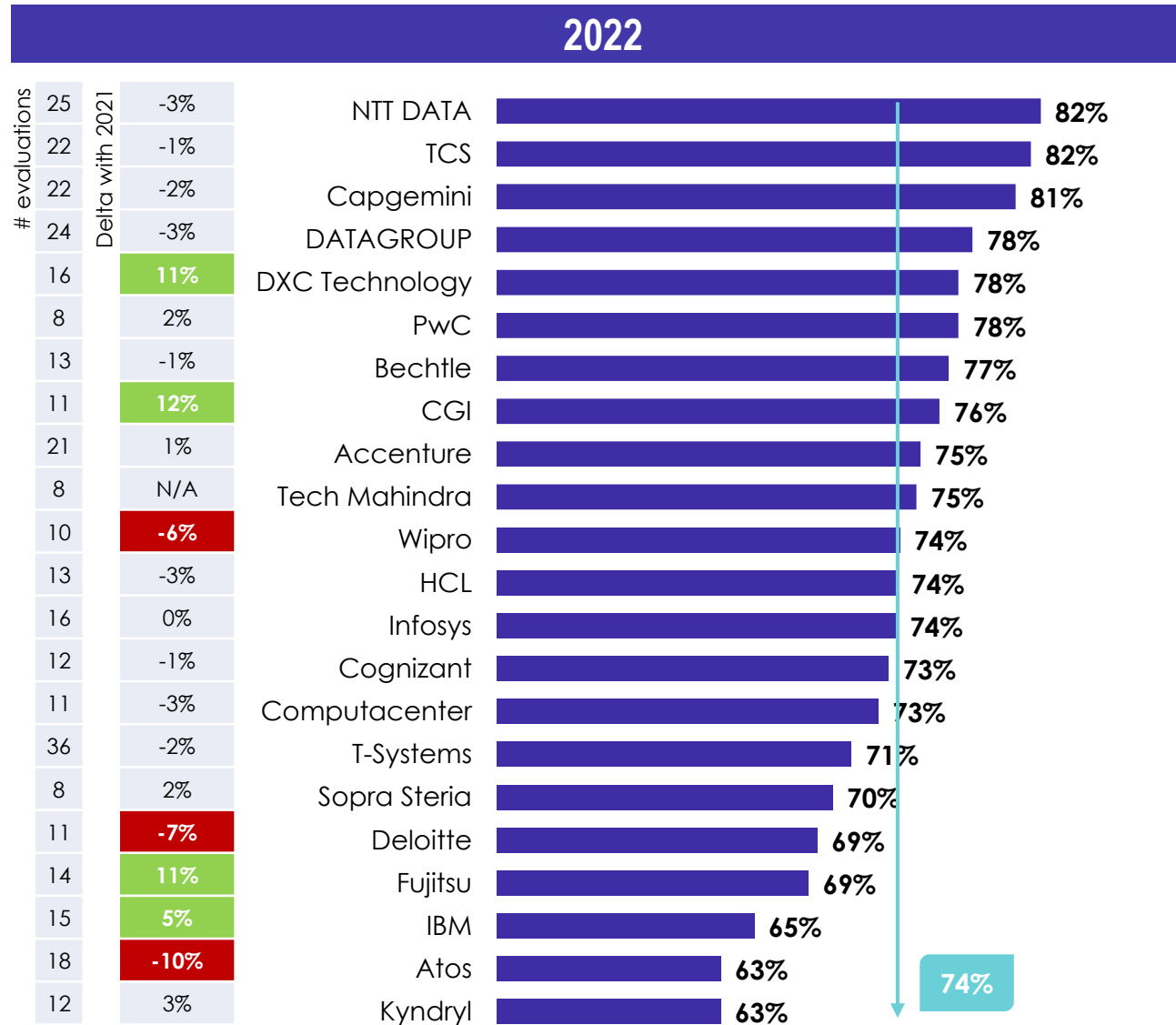
General satisfaction with service providers: Spain

(Comparison with 2021)



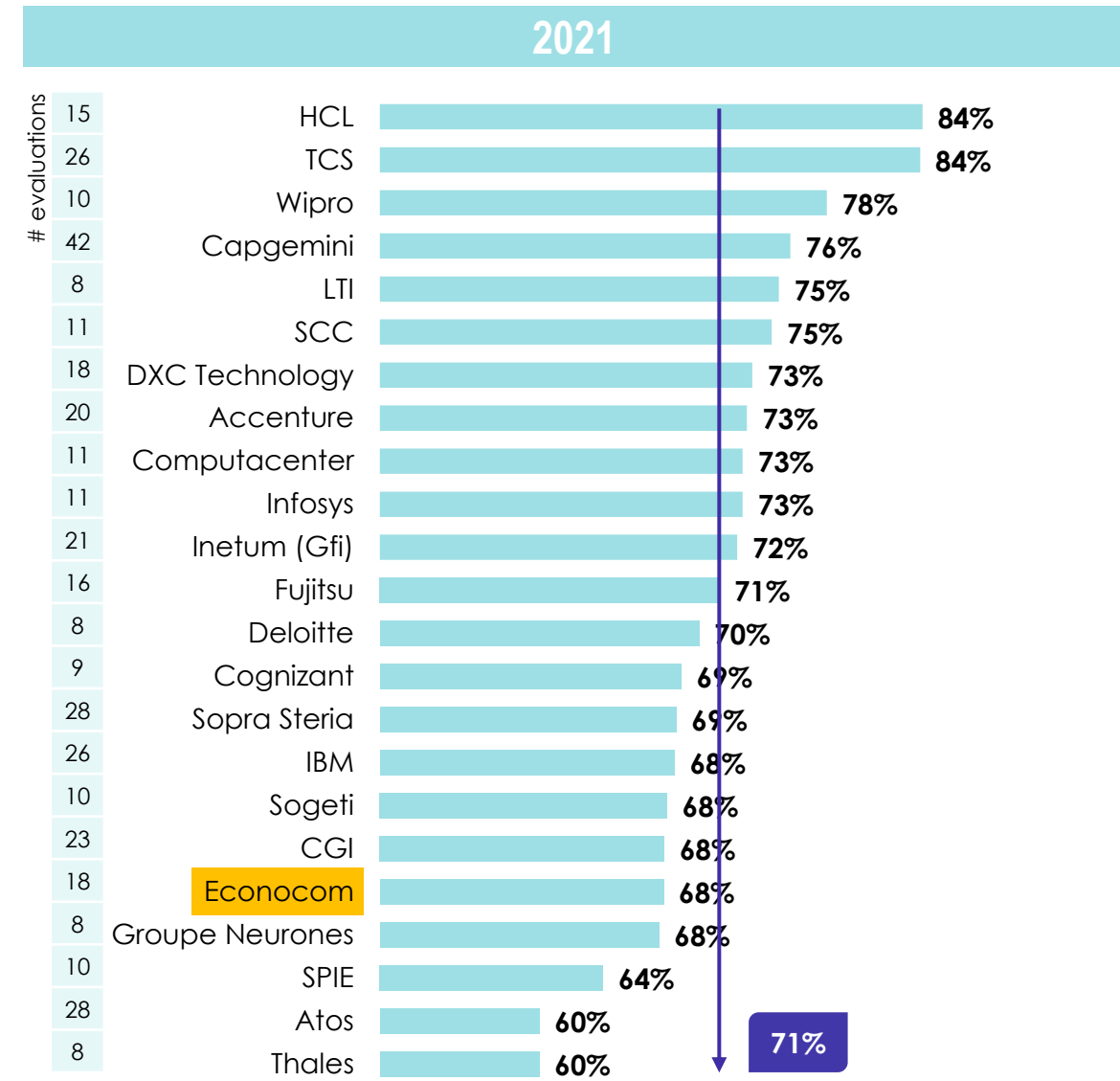
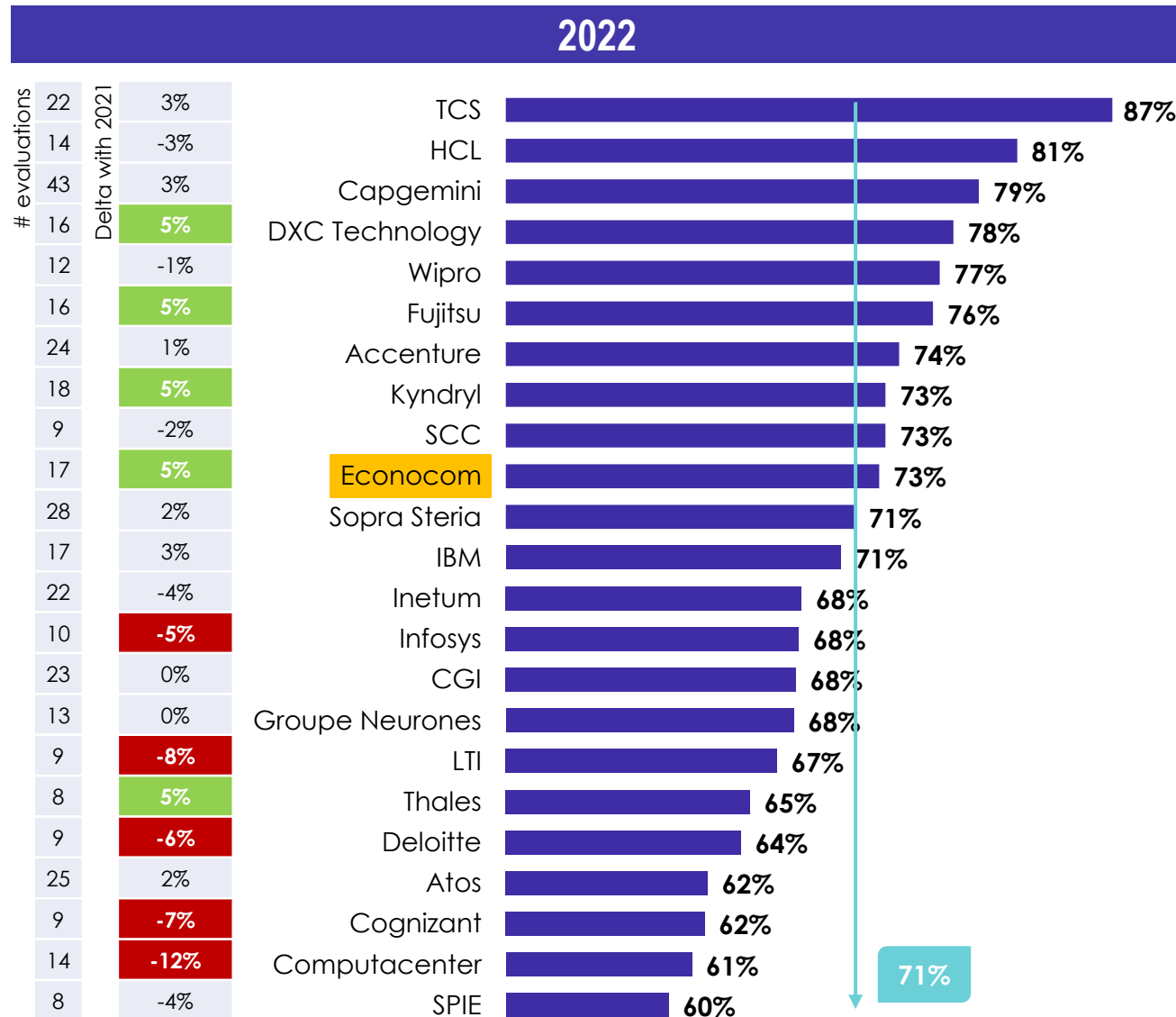
General satisfaction with service providers: Germany

(Comparison with 2021)

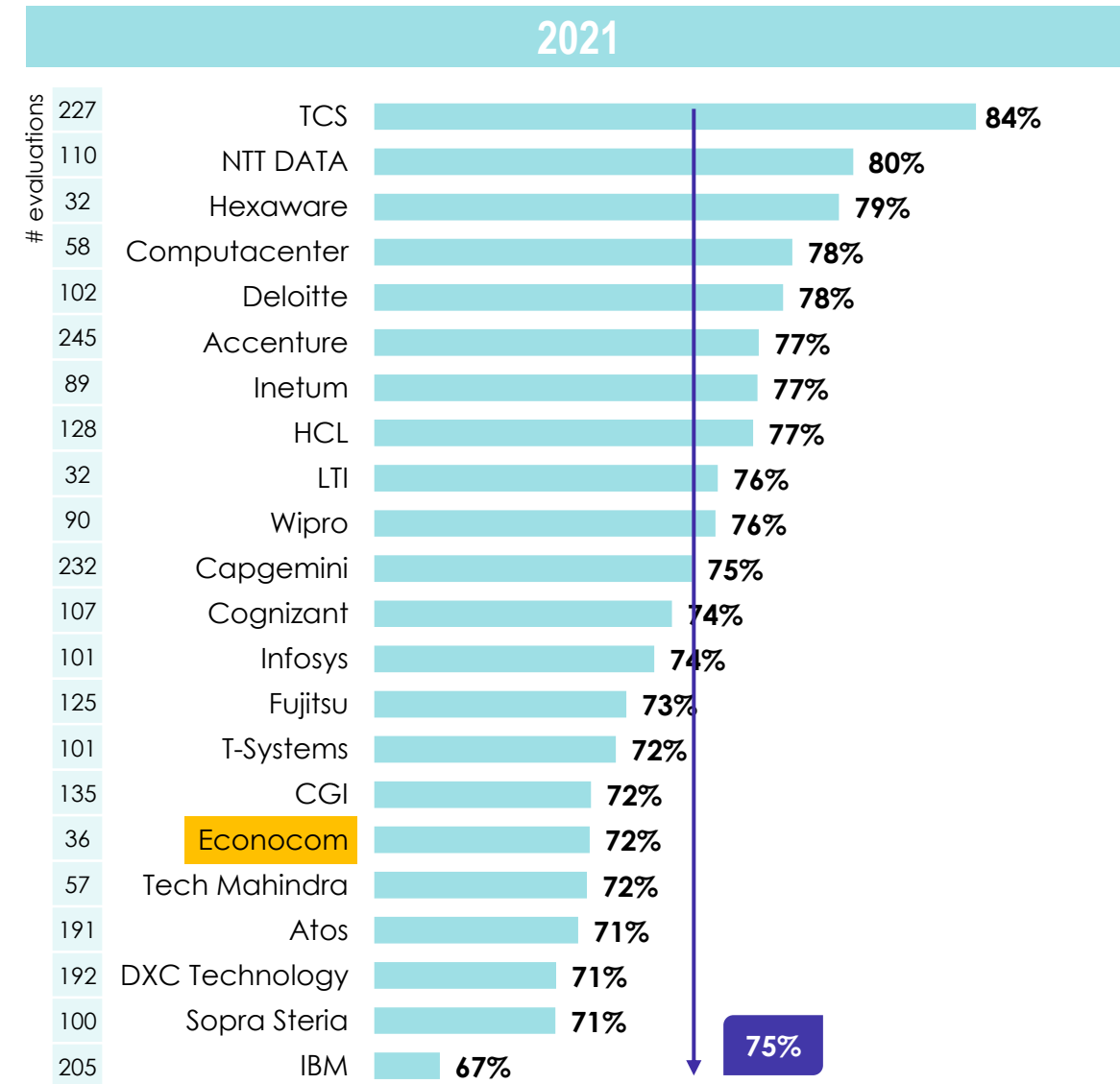
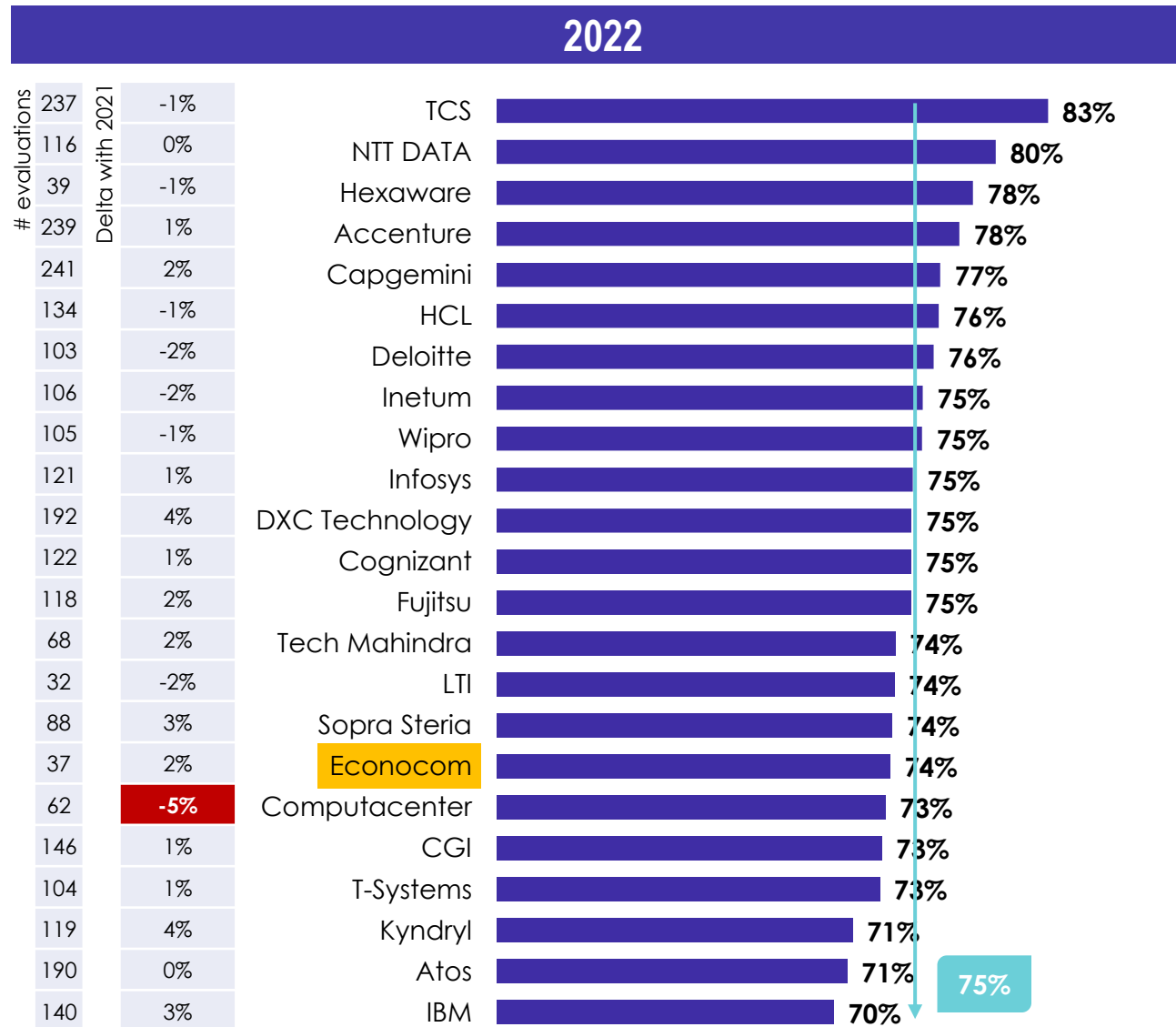


General satisfaction with service providers: France

(Comparison with 2021)



General satisfaction with service providers: Europe (Comparison with 2021)



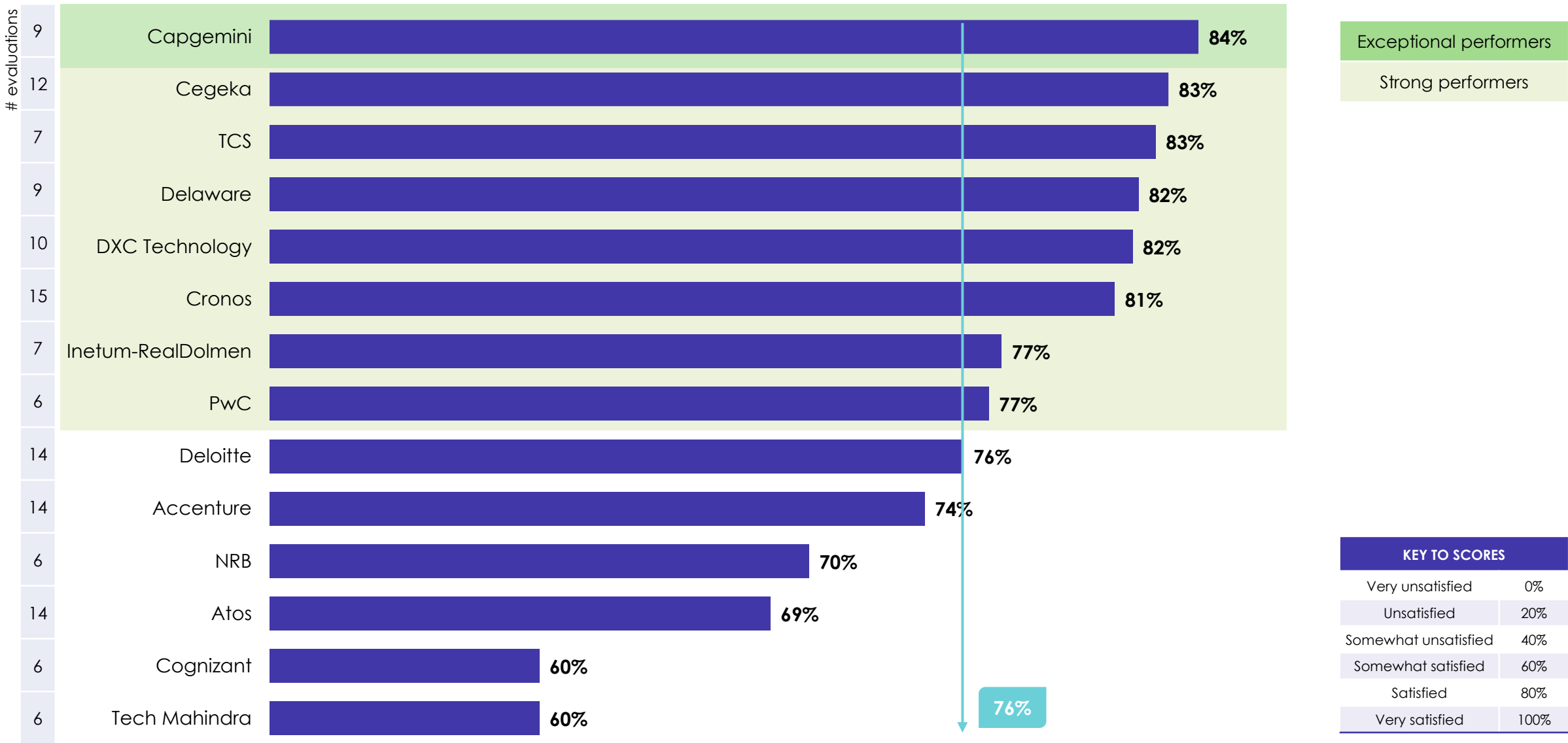


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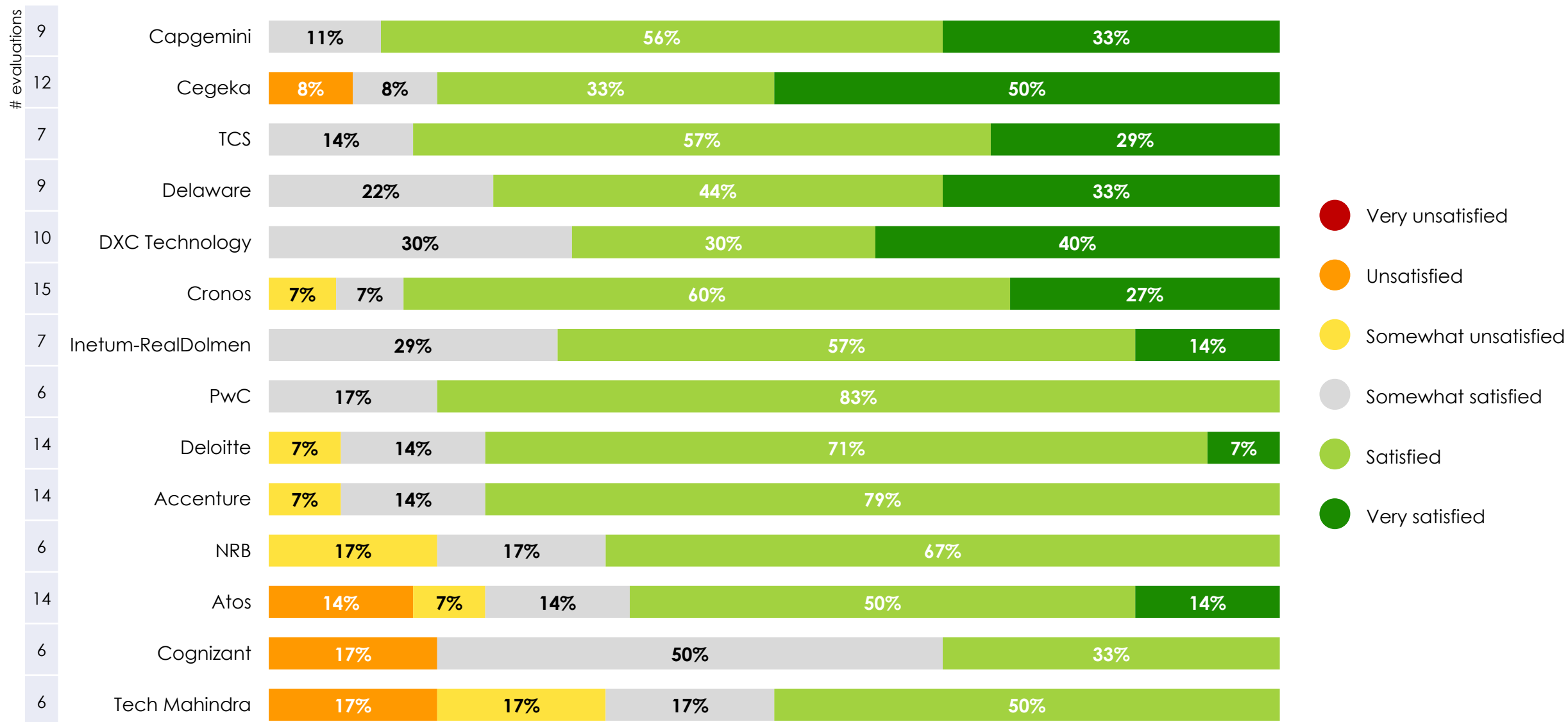
IT service provider performance

Satisfaction by IT domain

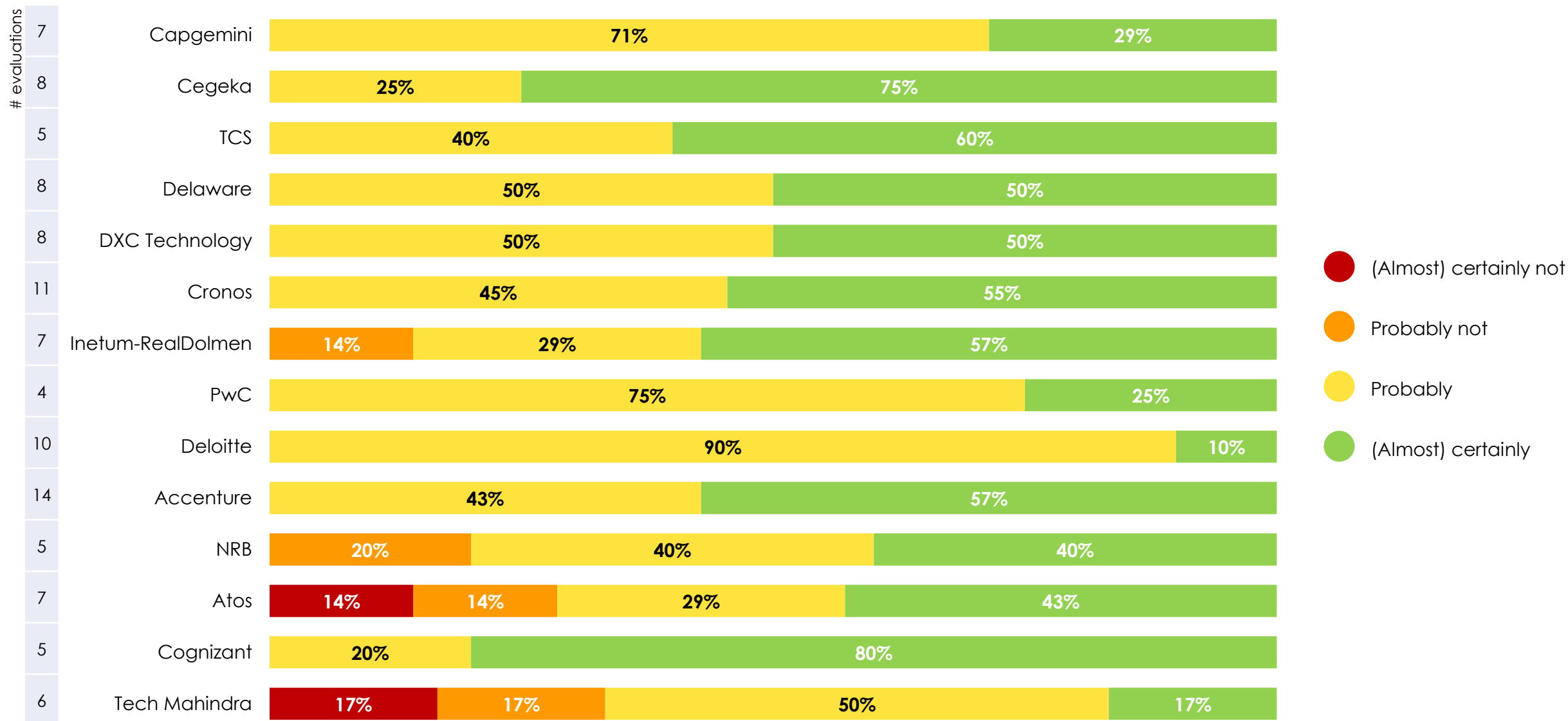
Digital Transformation



Digital transformation (Detailed satisfaction)



Digital transformation (Likeliness of contract renewal)



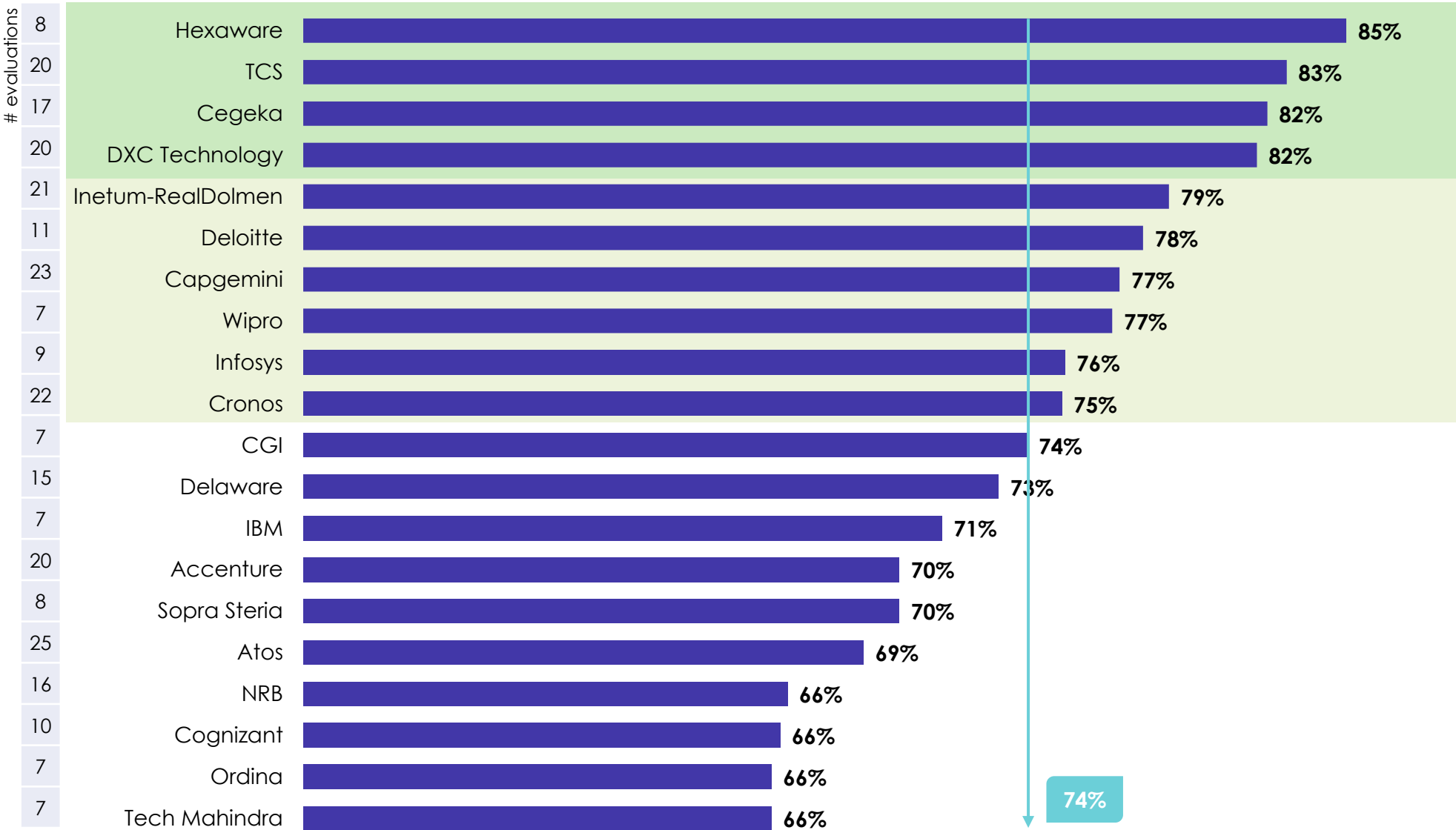


03

IT service provider performance

Satisfaction by IT domain

Application Services



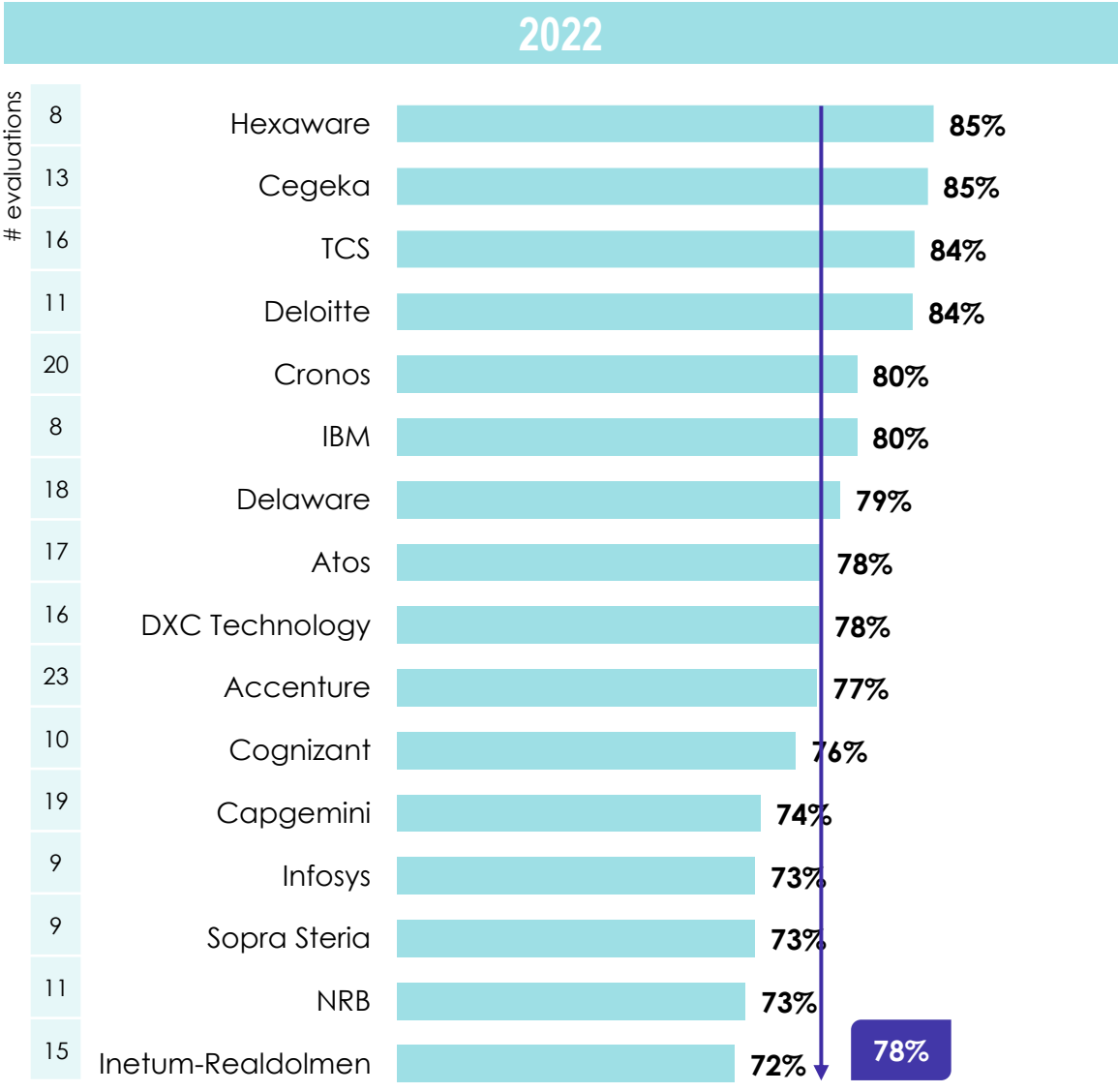
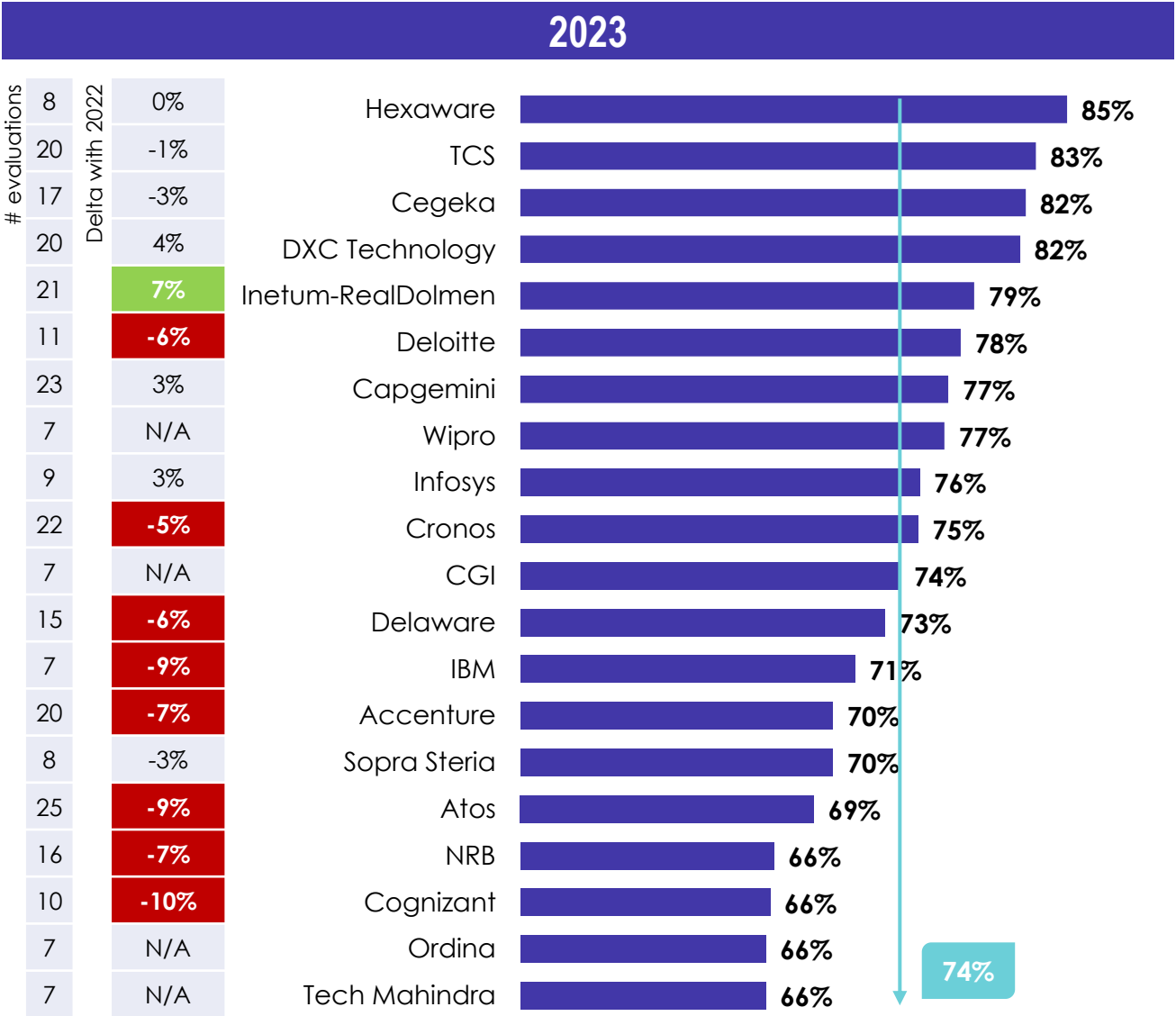
Exceptional performers

Strong performers

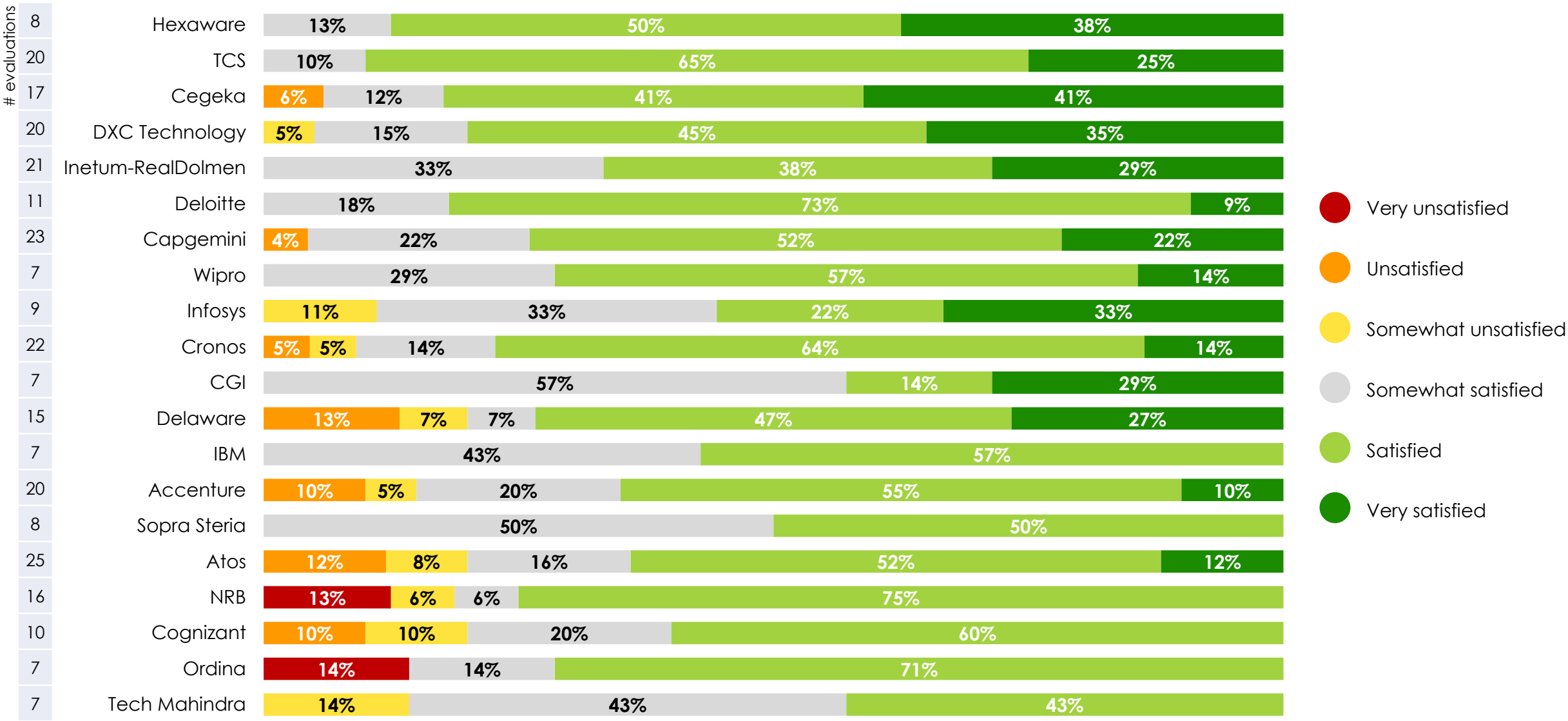
KEY TO SCORES

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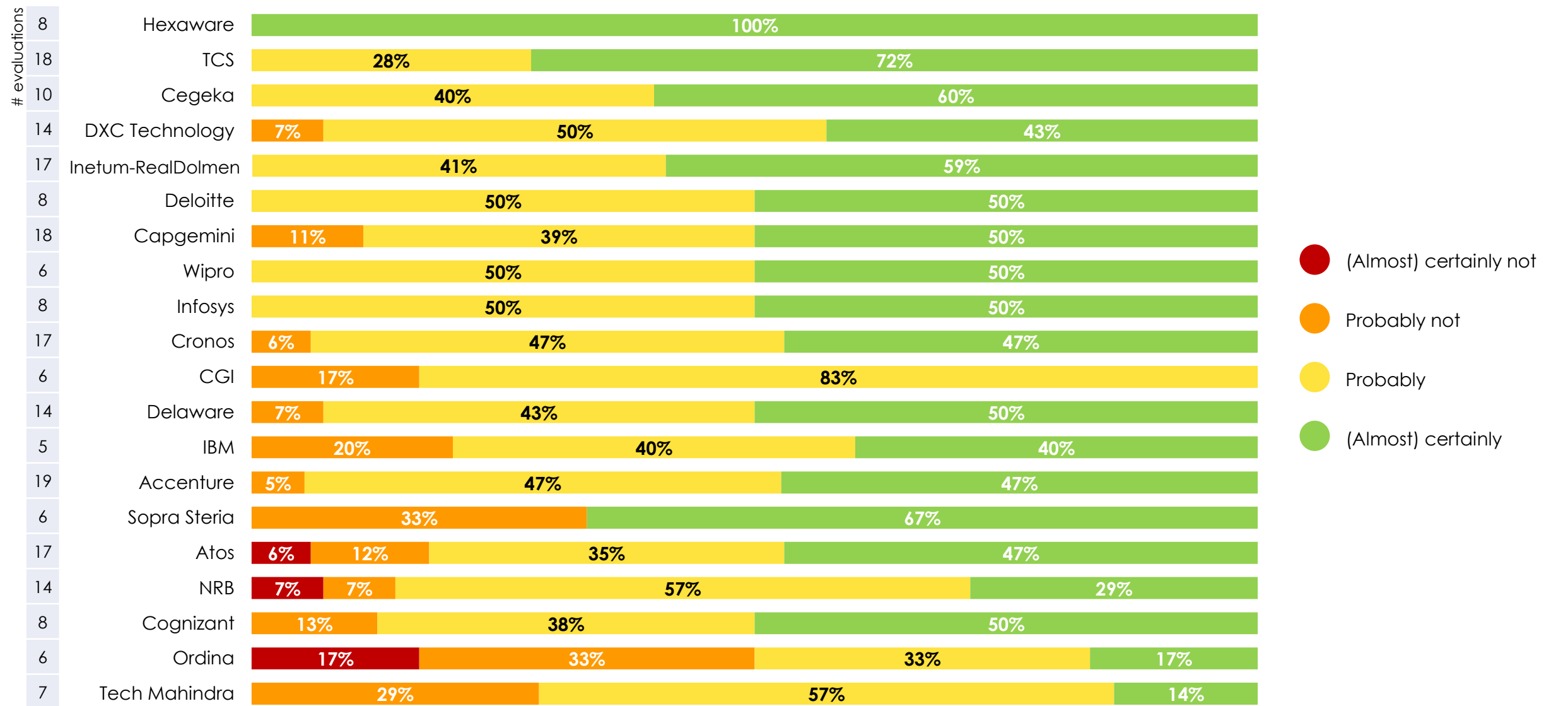
Application services (Comparison with 2022)



Application services (Detailed satisfaction)



Application services(Likelihood of contract renewal)



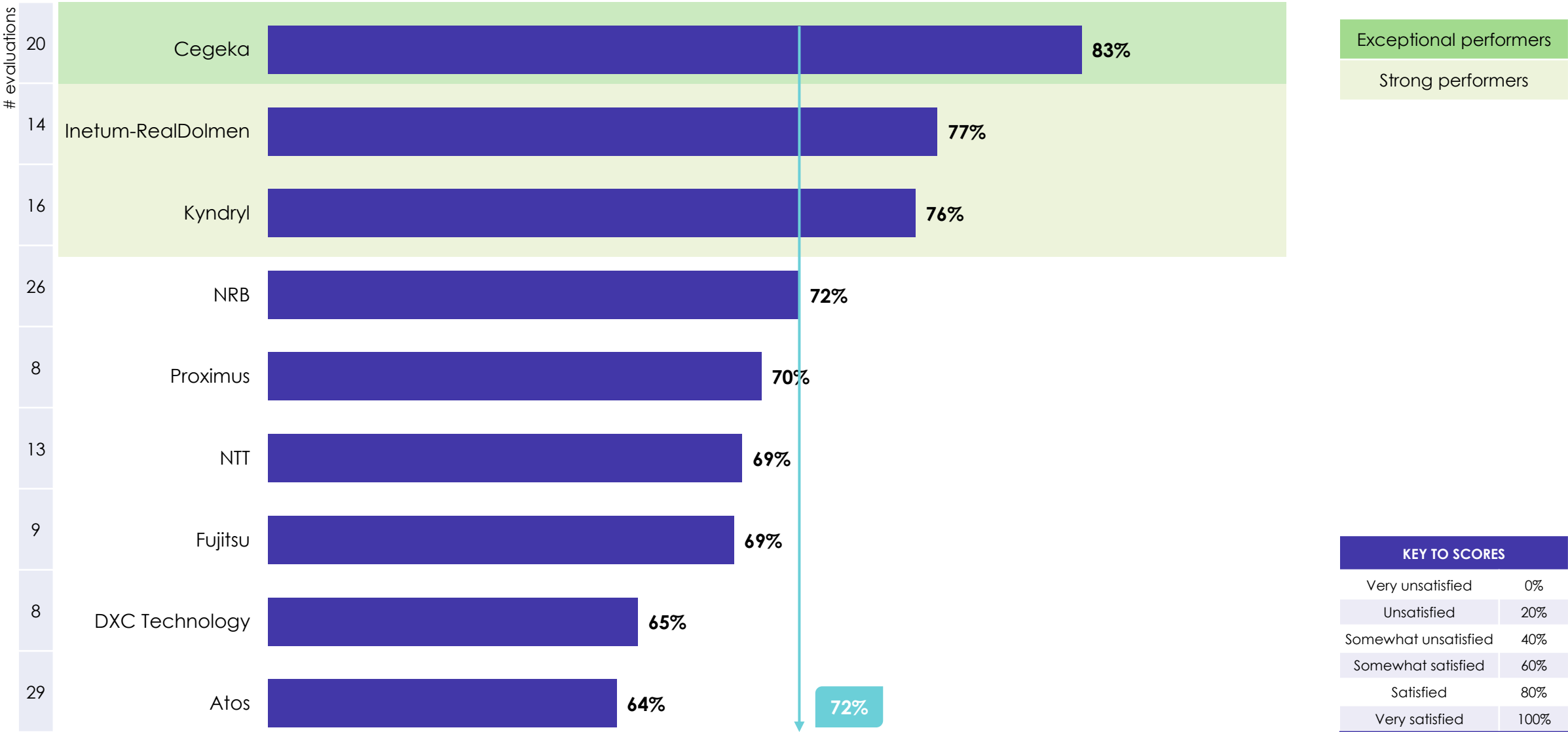


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IT service provider performance

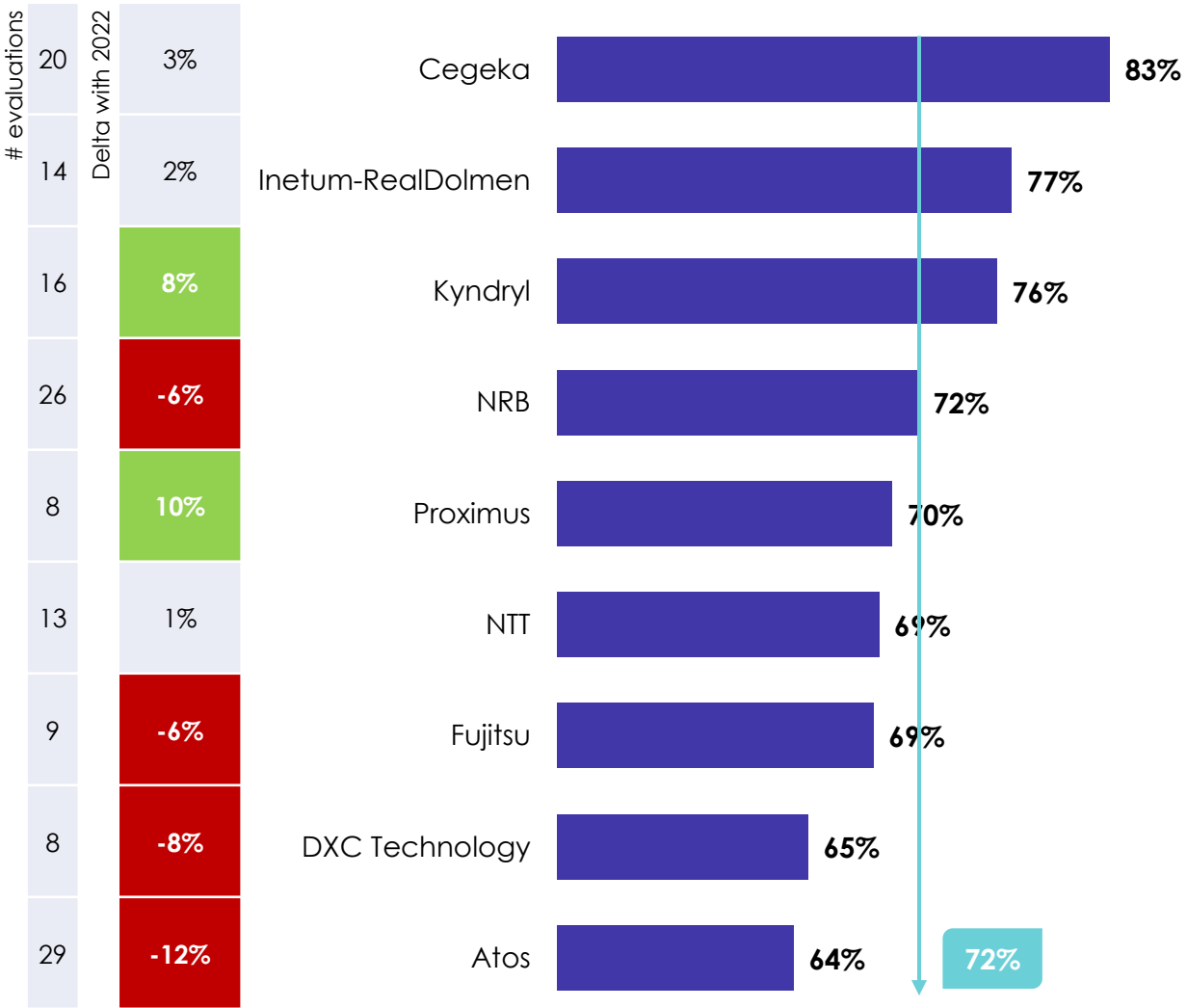
Satisfaction by IT domain

Infrastructure Hosting

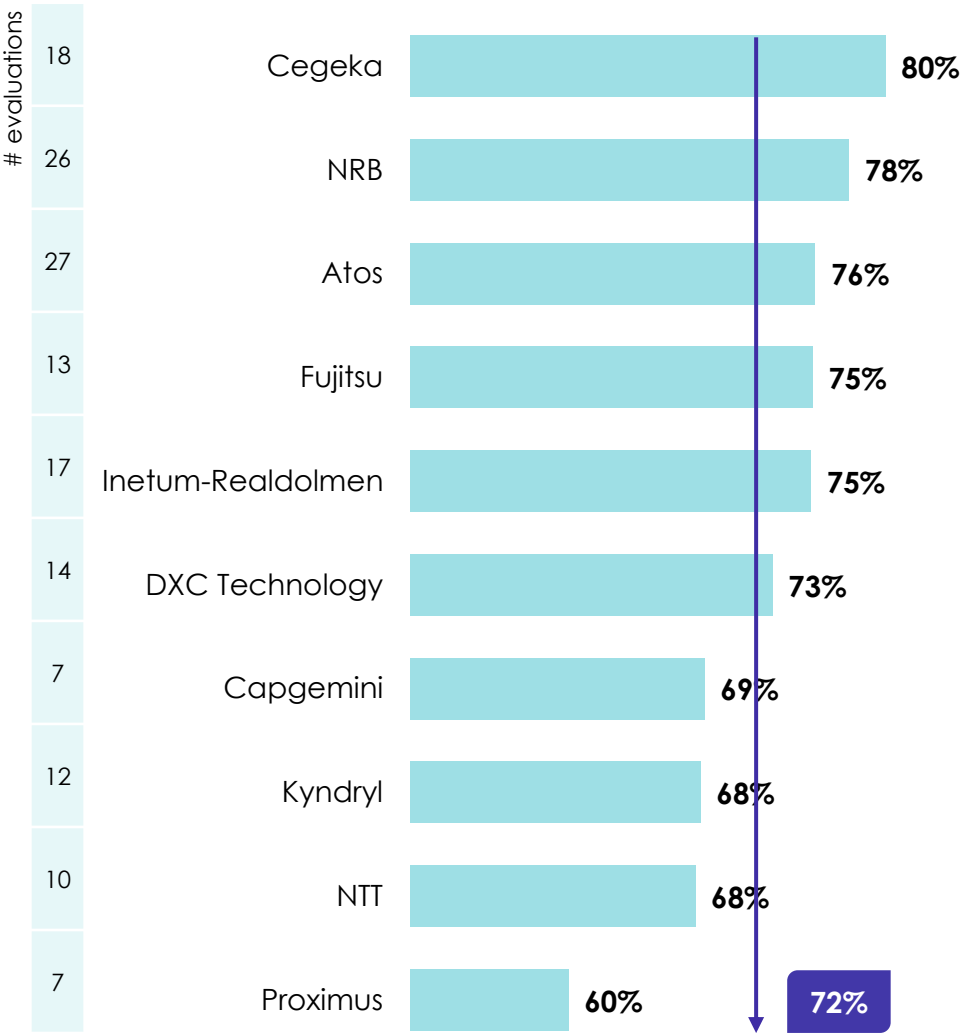


Infrastructure hosting (Comparison with 2022)

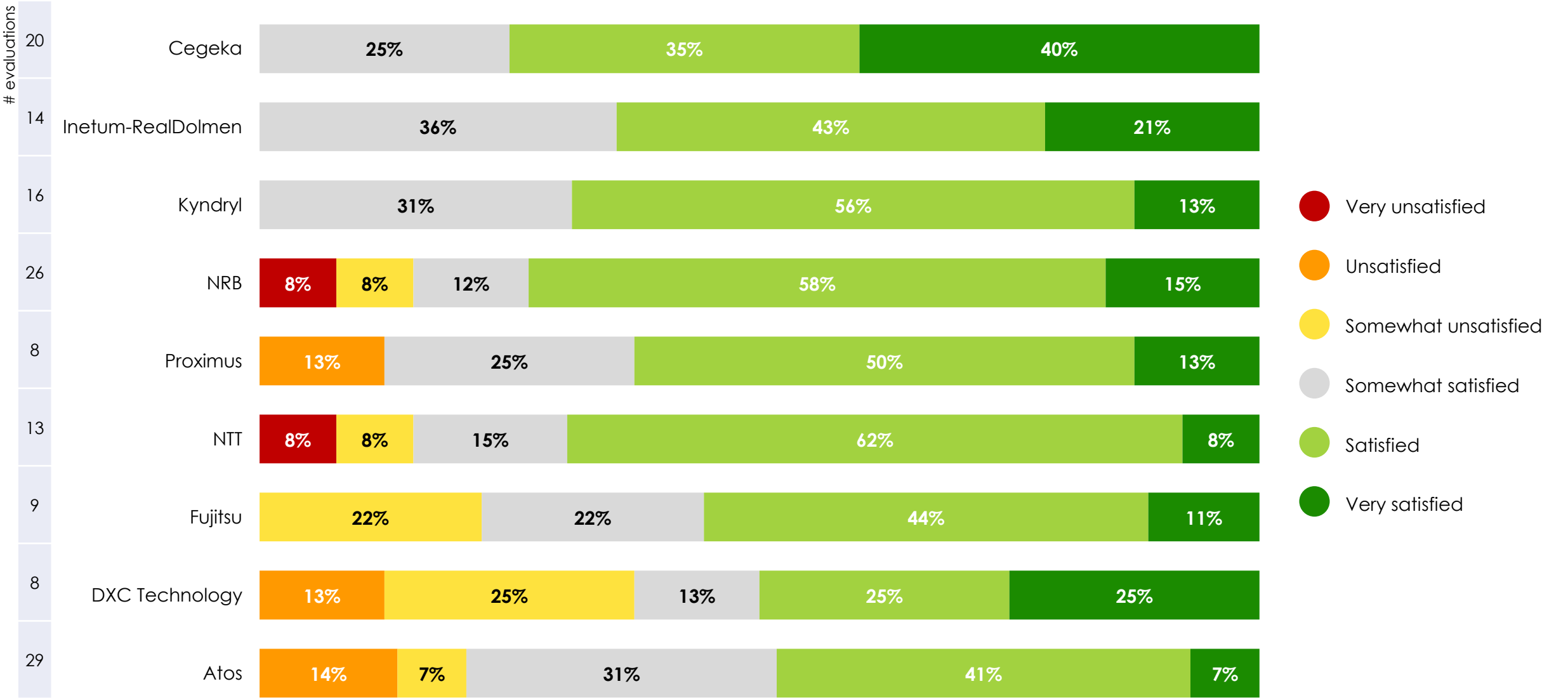
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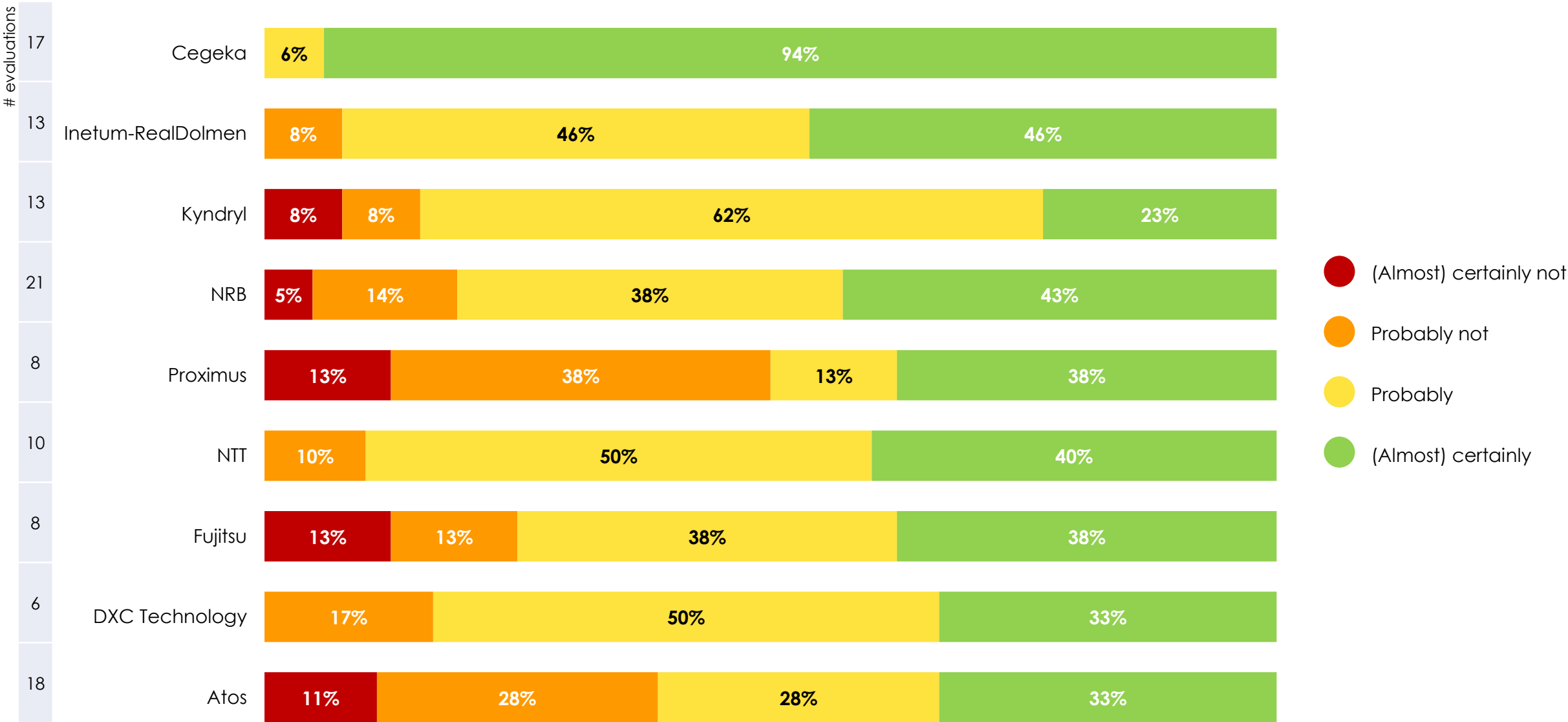
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Infrastructure hosting (Detailed satisfaction)



Infrastructure hosting (Likelihood of contract renewal)





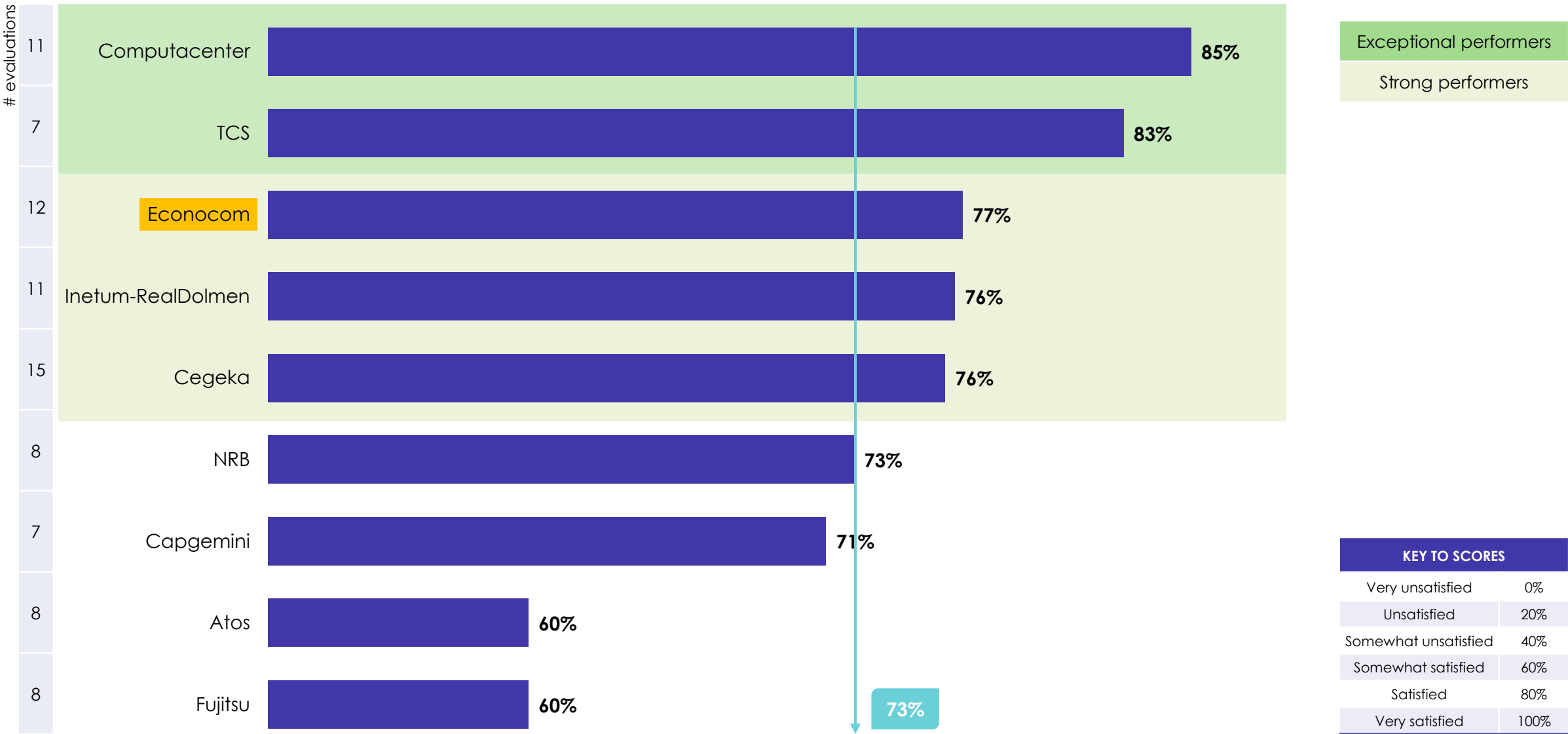
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IT service provider performance

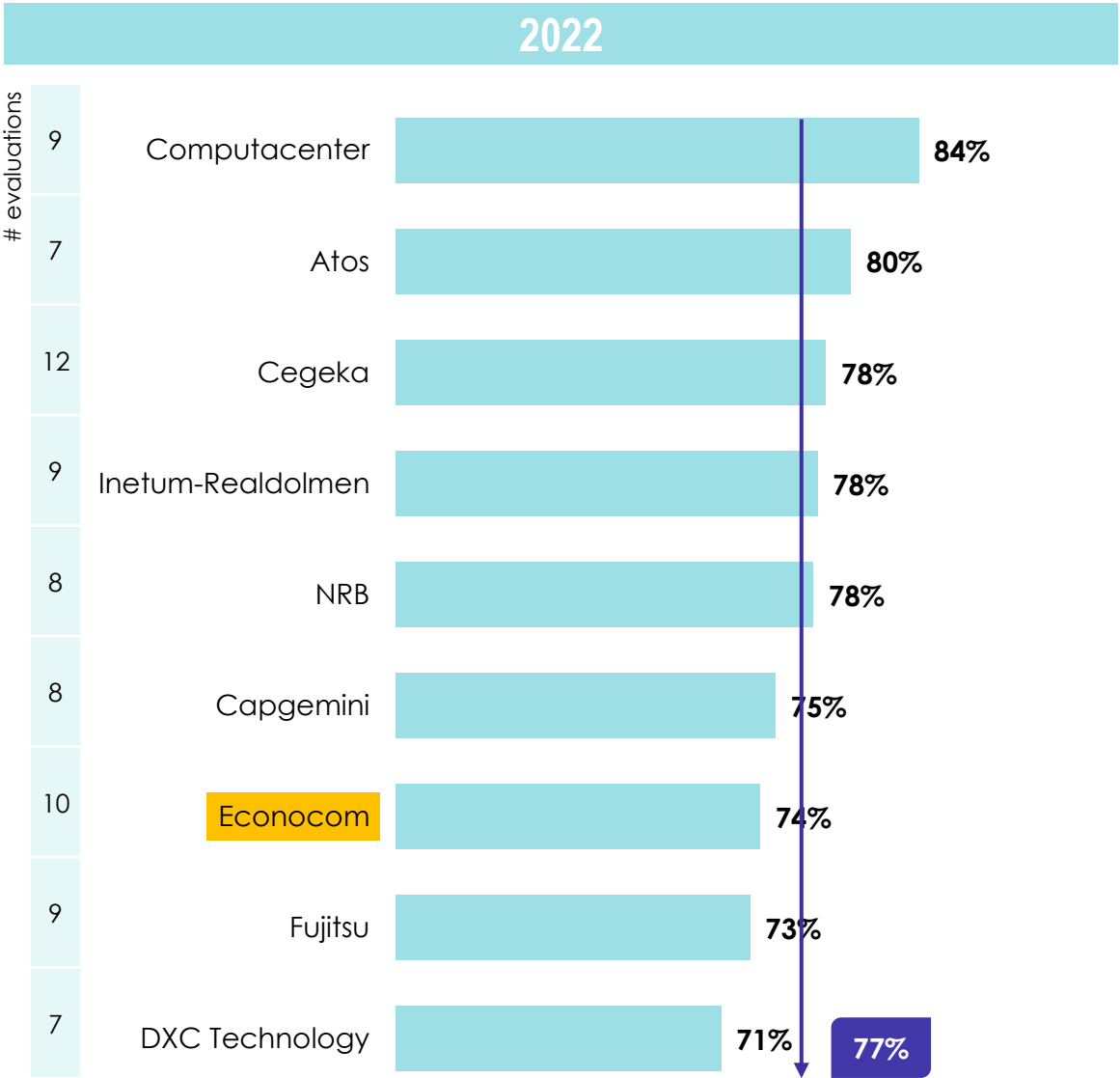
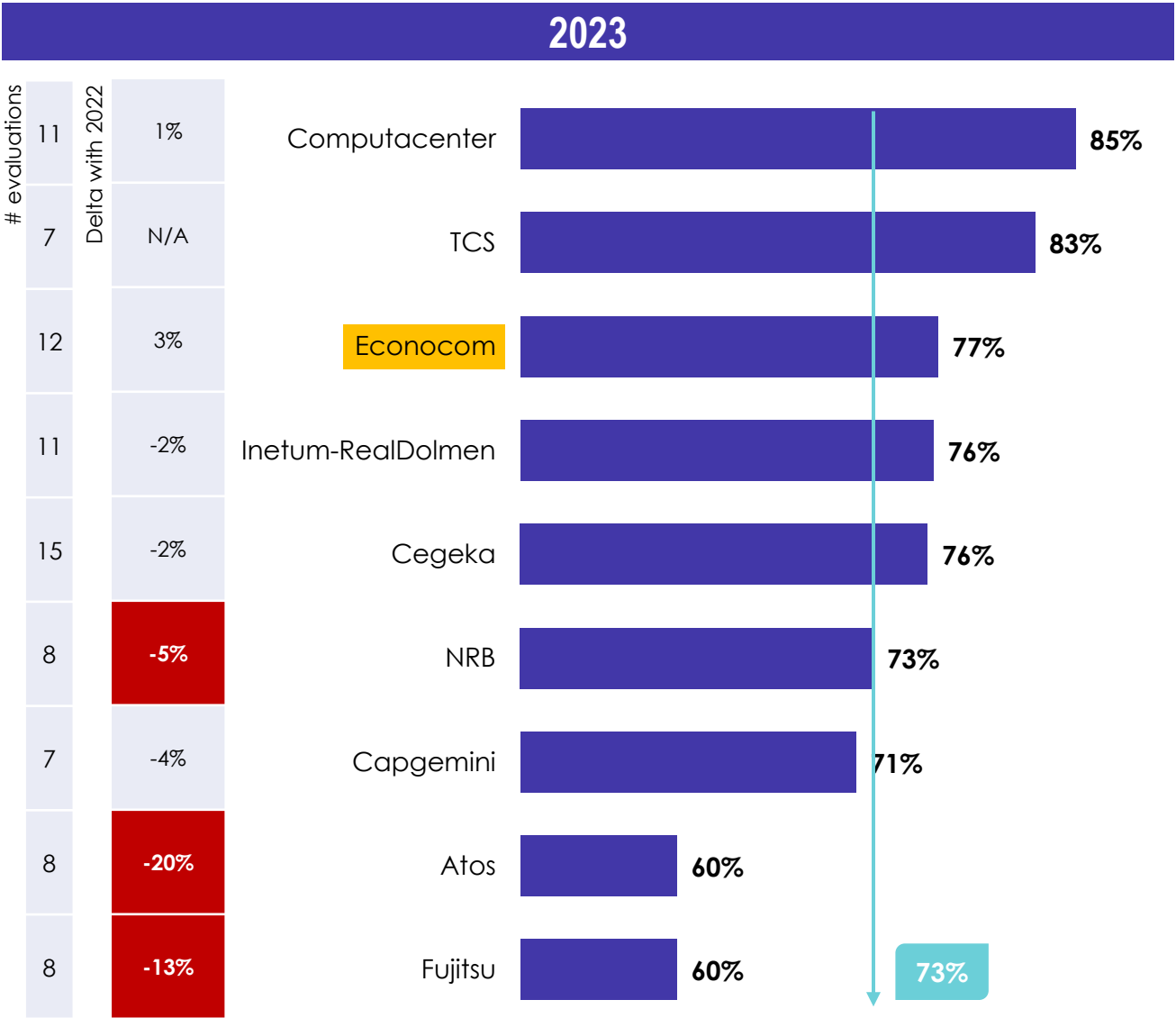
Satisfaction by IT domain

Workplace Services

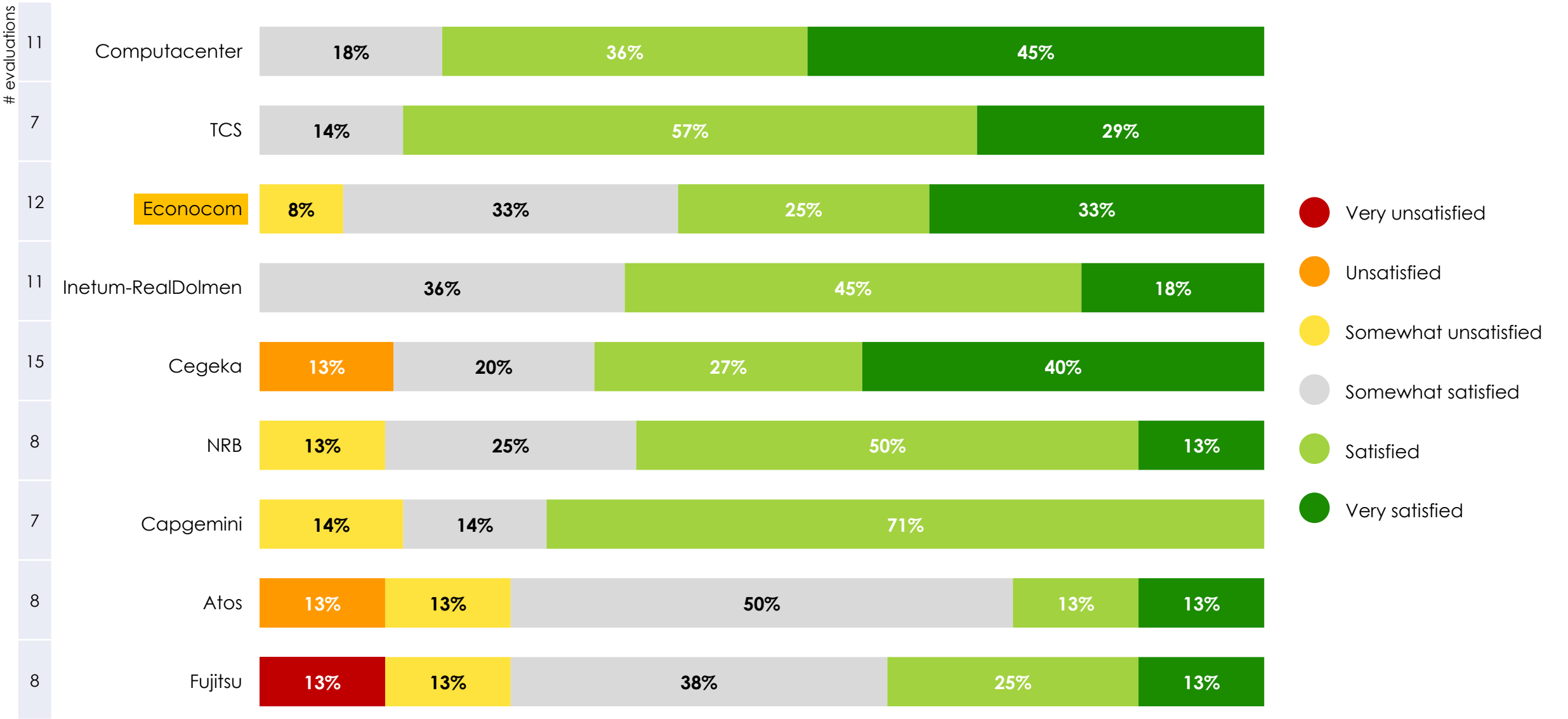
Workplace services



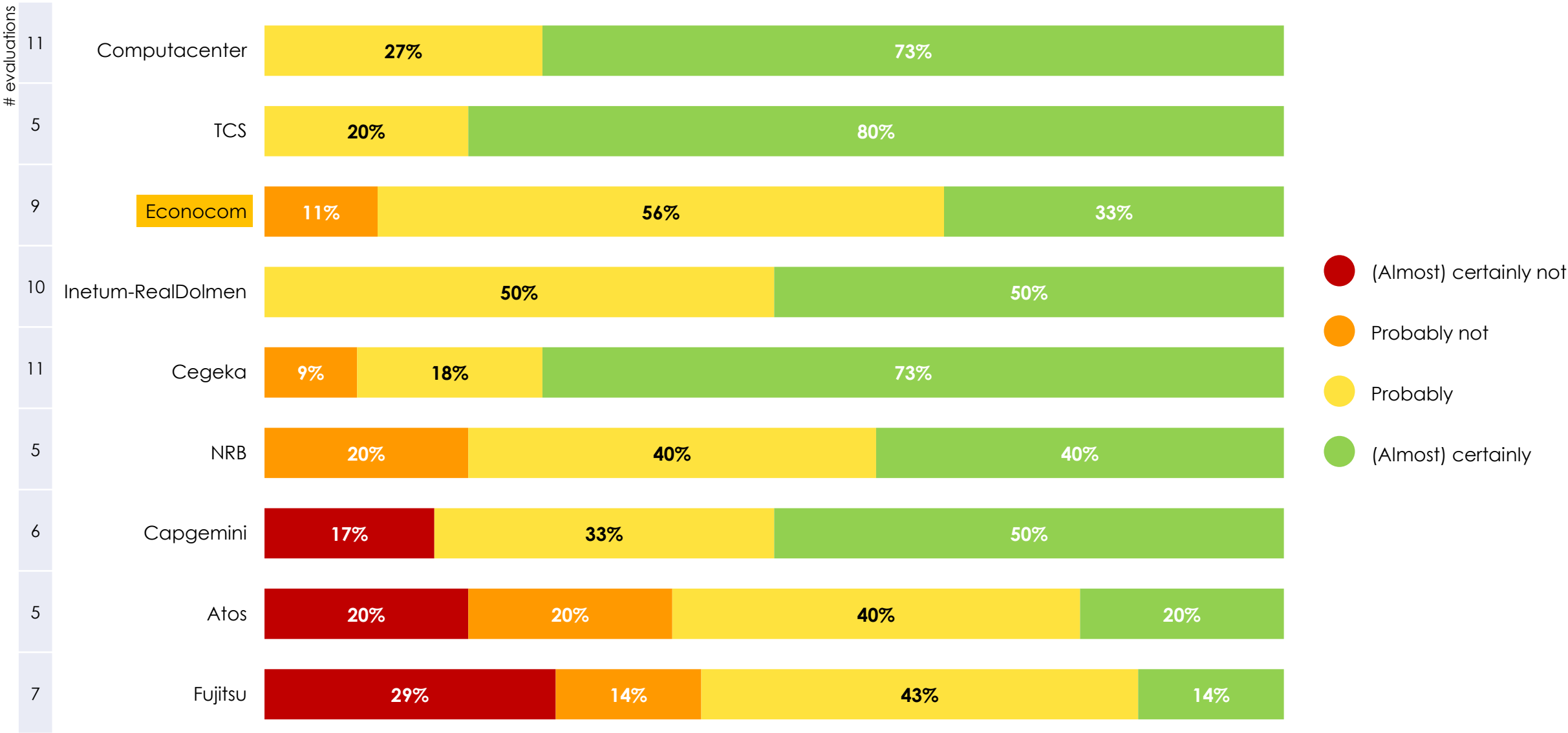
Workplace services (Comparison with 2022)



Workplace services (Detailed satisfaction)



Workplace services (Likelihood of contract renewal)



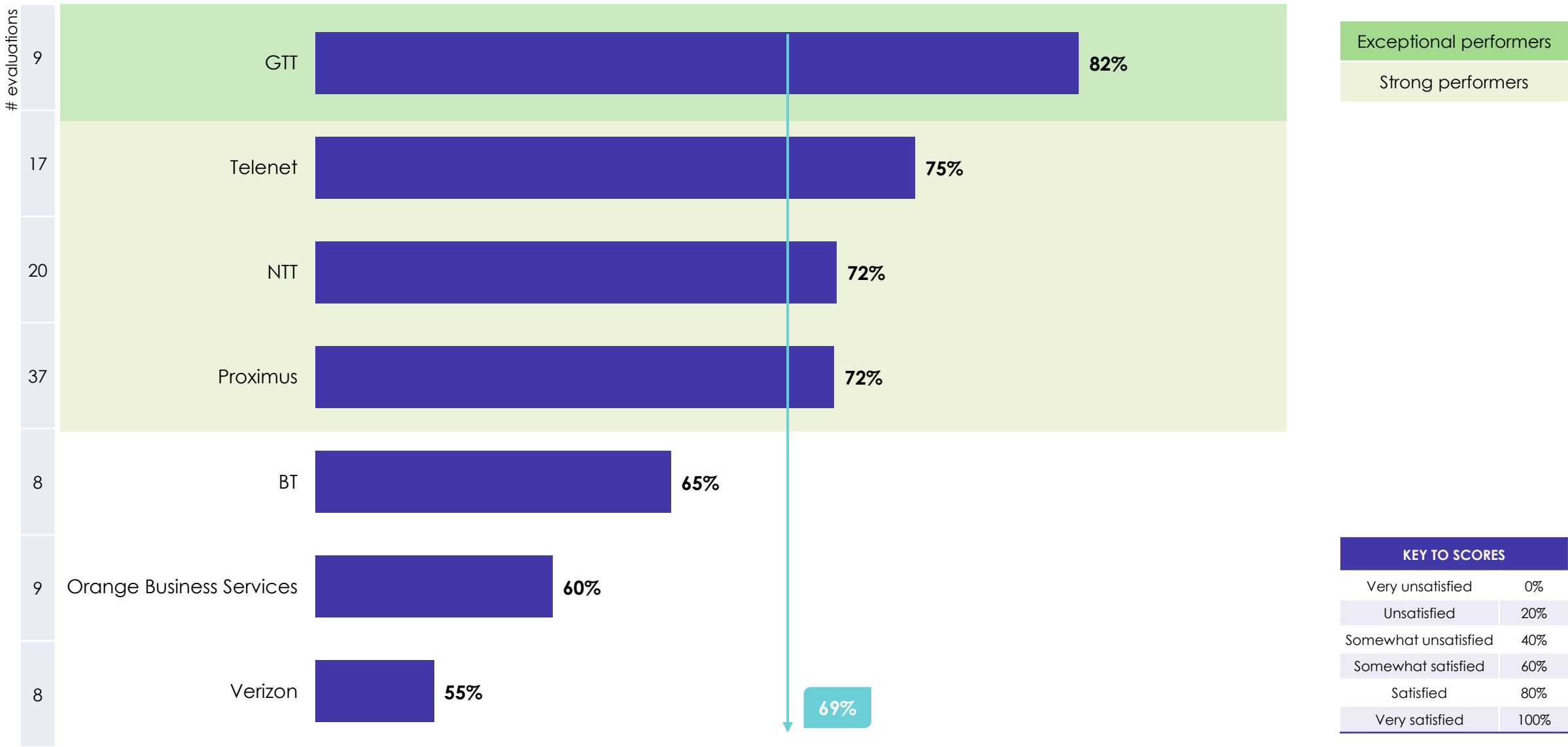


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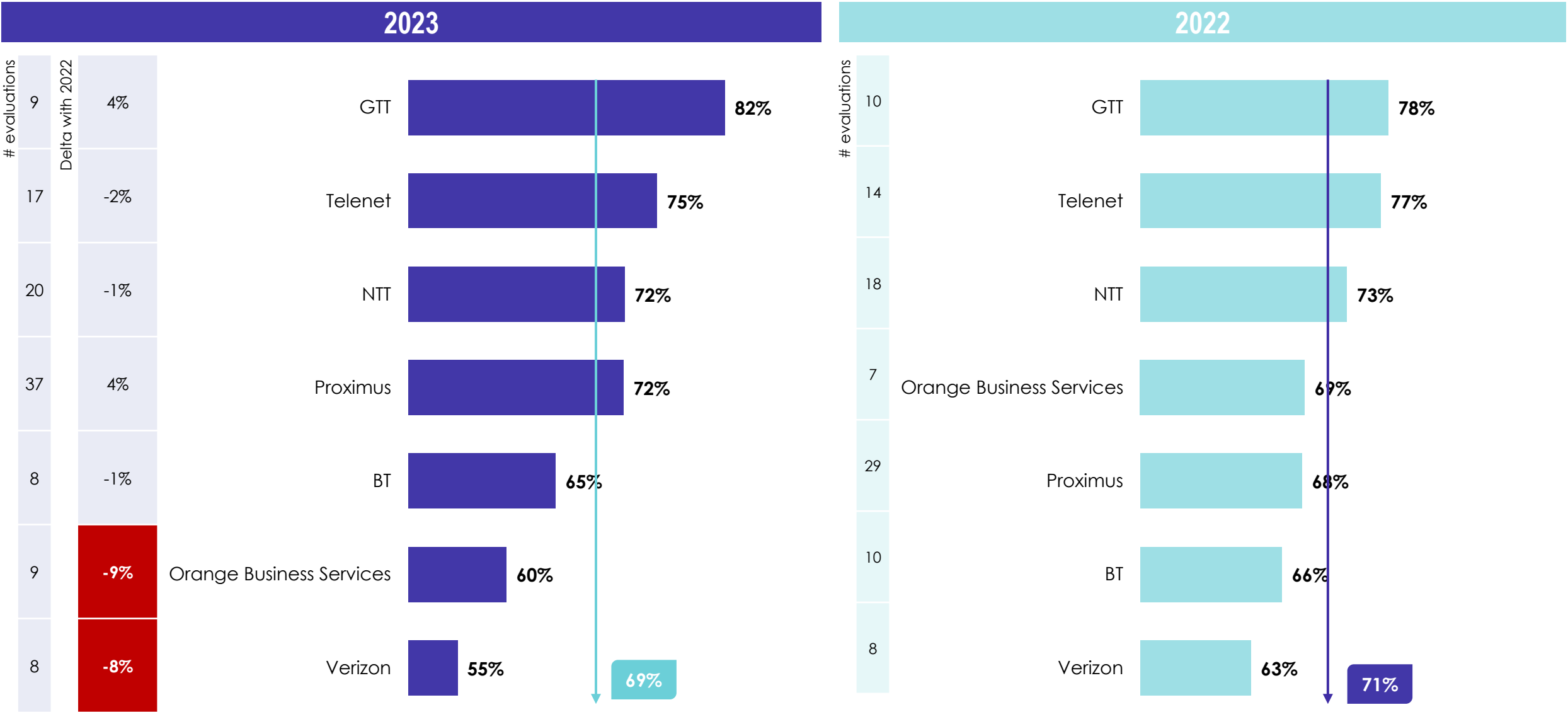
IT service provider performance

Satisfaction by IT domain

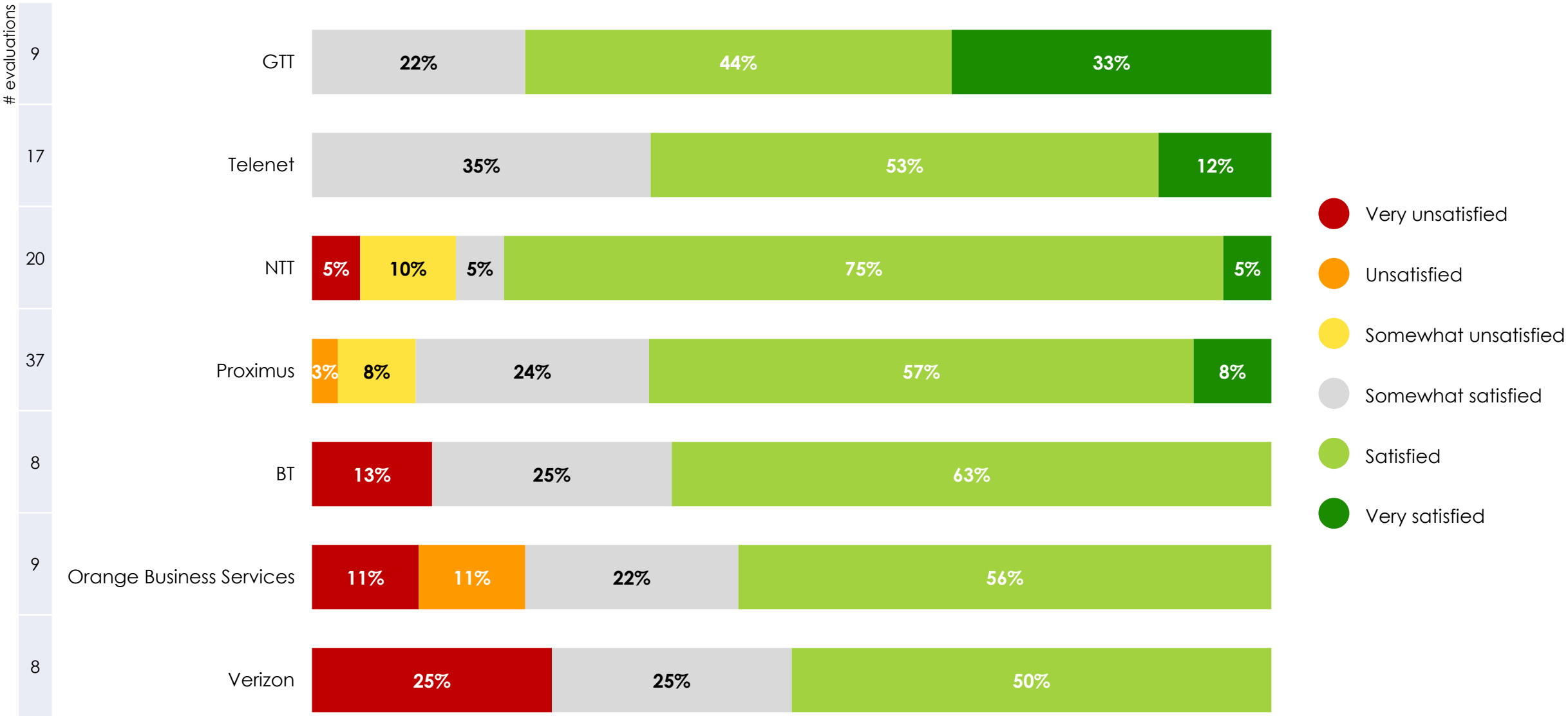
Network & Telecommunications



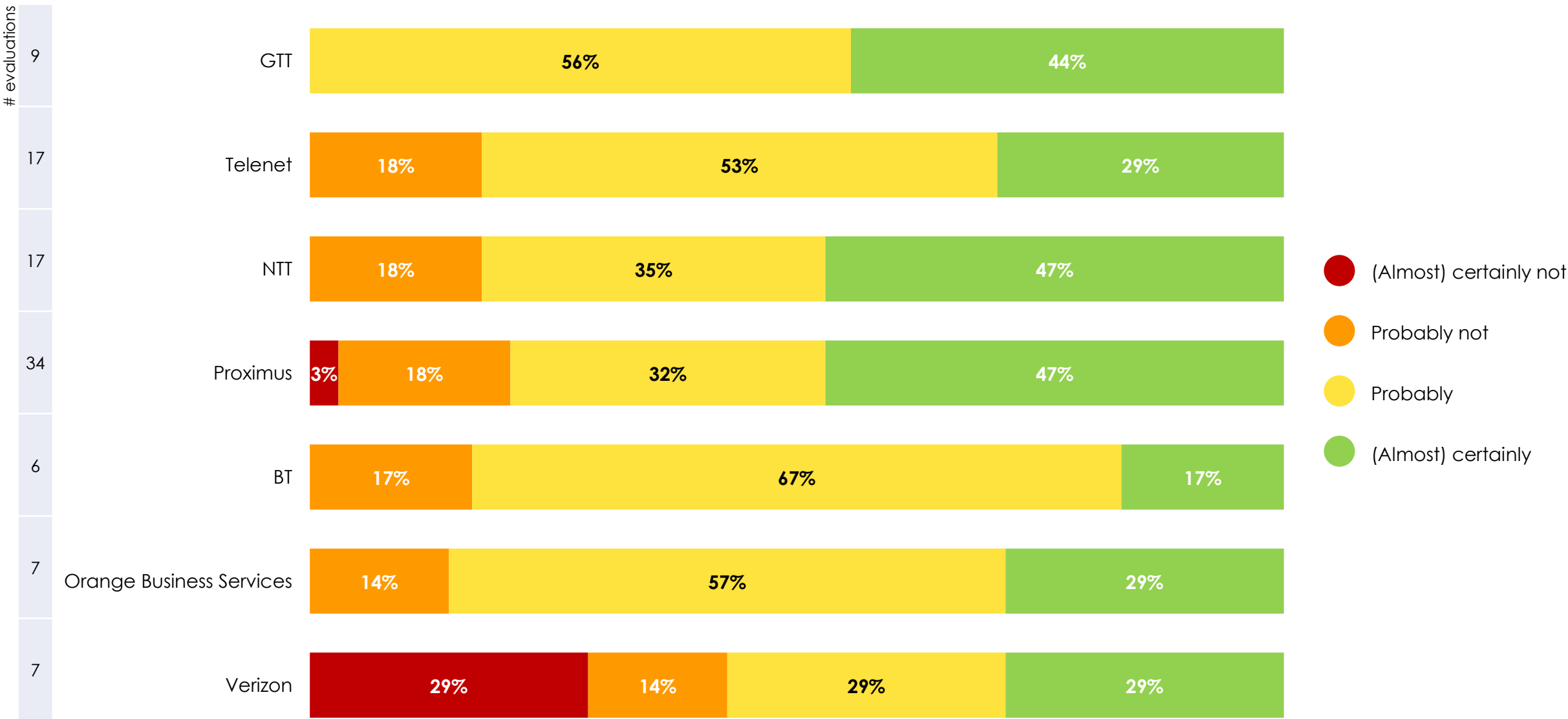
Network & telecommunications (Comparison with 2022)



Network & telecommunications (Detailed satisfaction)



Network & telecommunications (Likelihood of contract renewal)



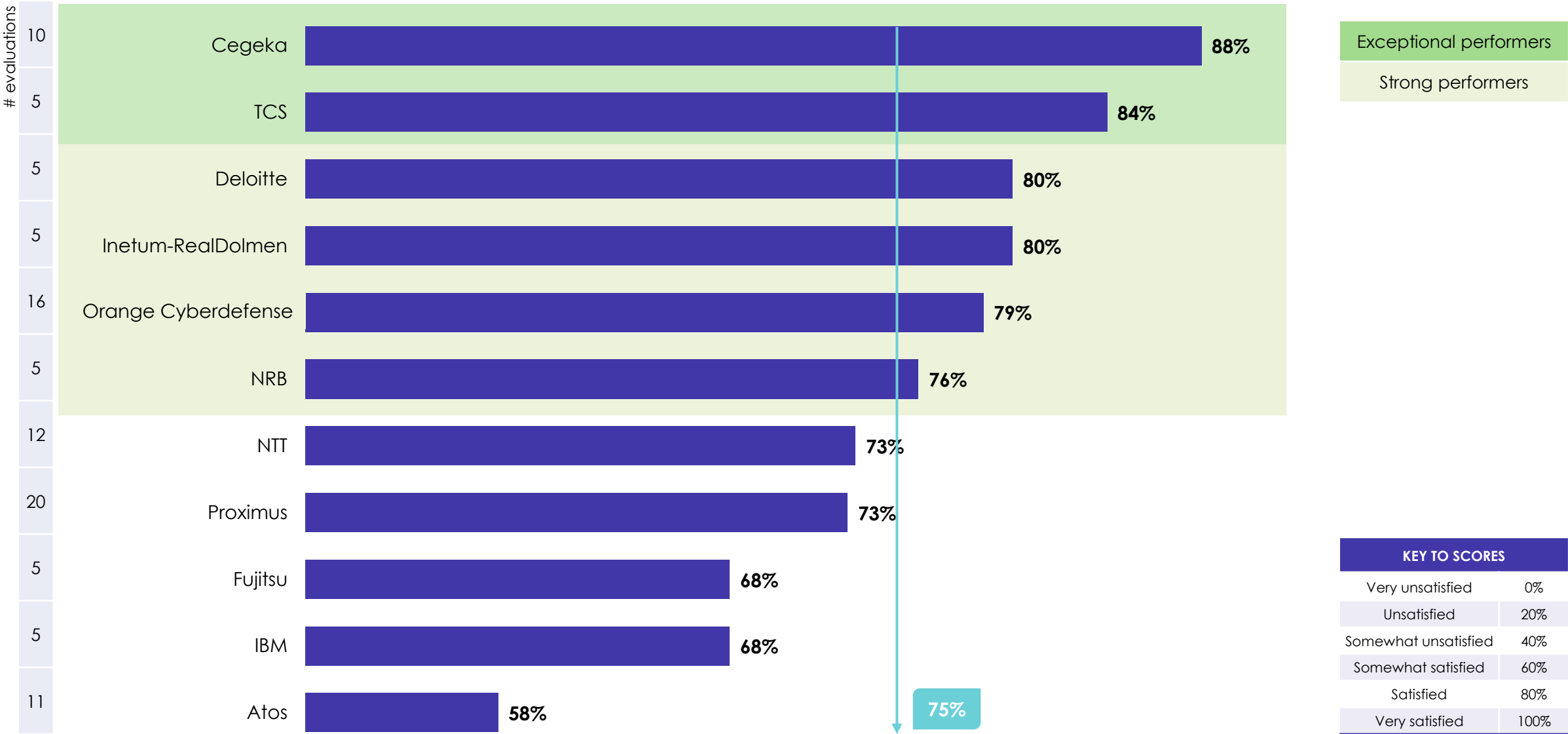


03

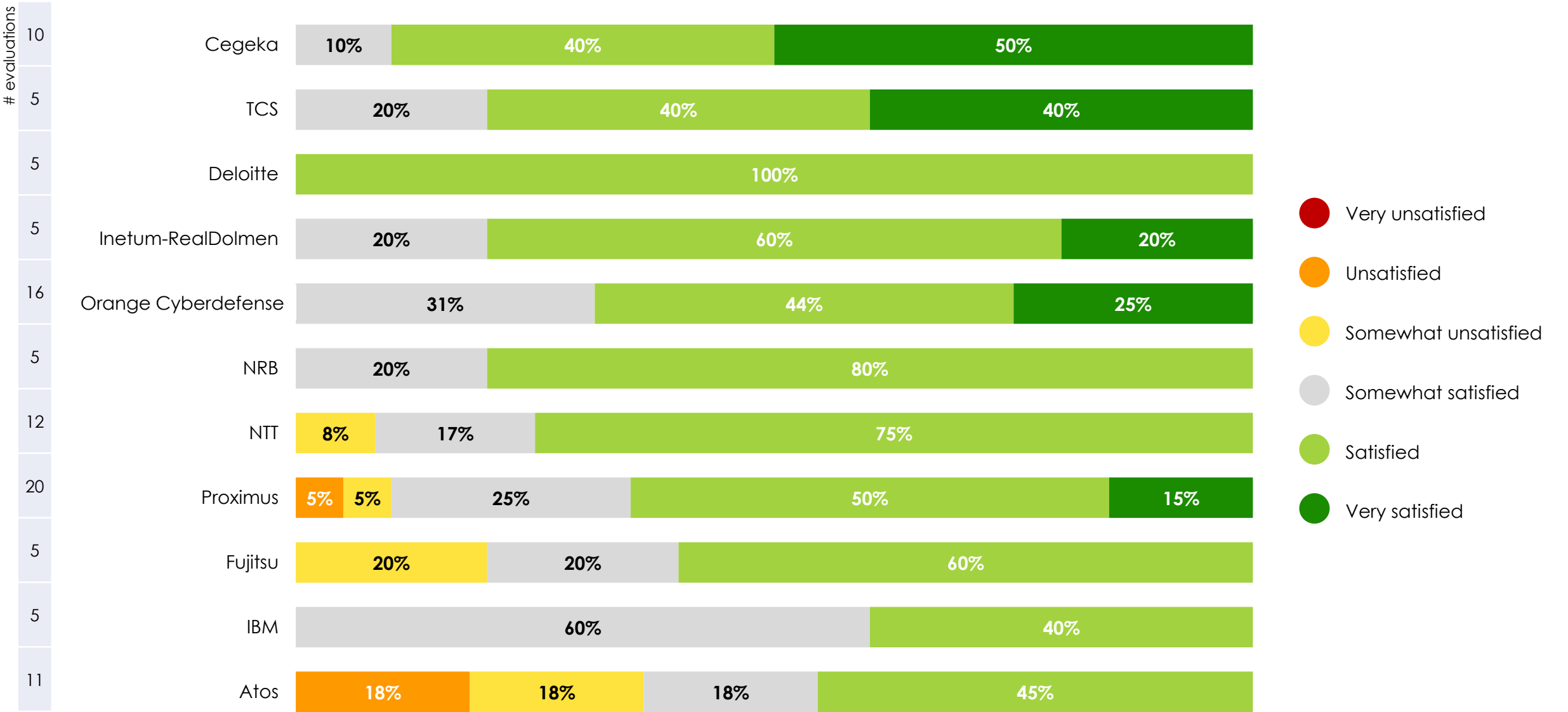
IT service provider performance

Satisfaction by IT domain

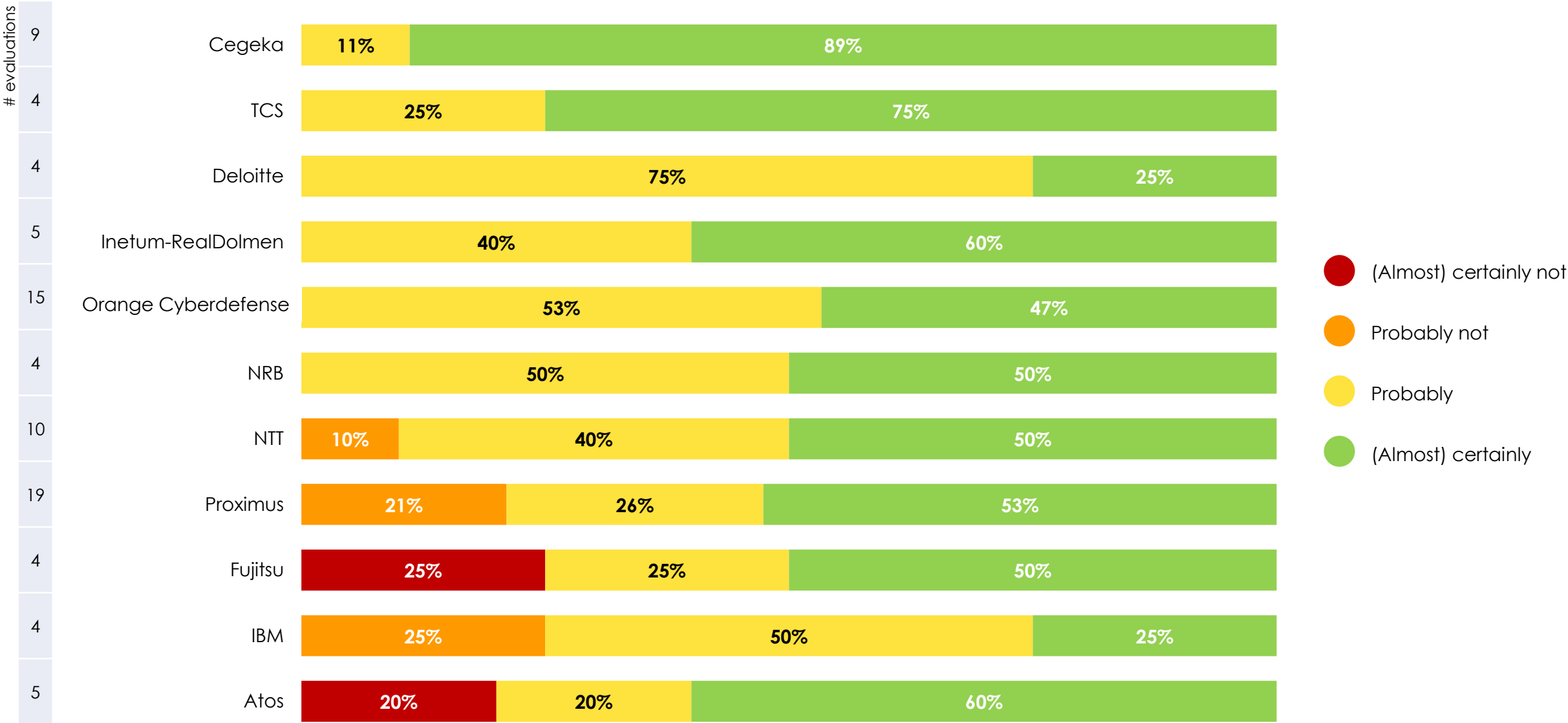
Security Services



Security services (Detailed satisfaction)



Security services (Likelihood of contract renewal)



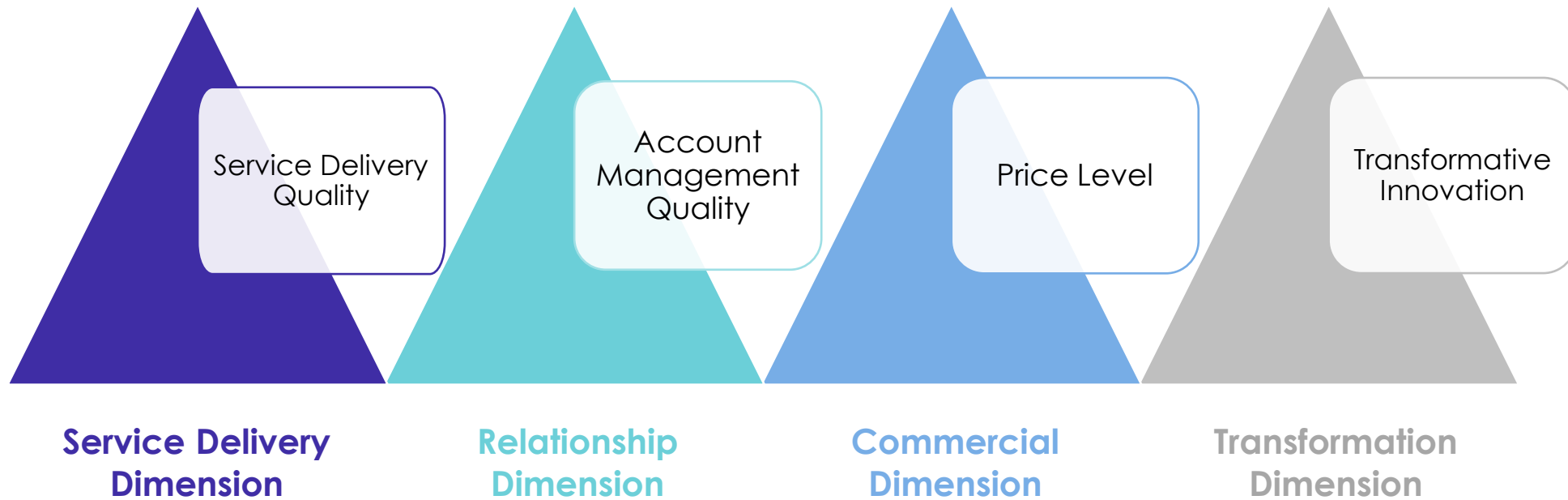


03

IT service provider performance

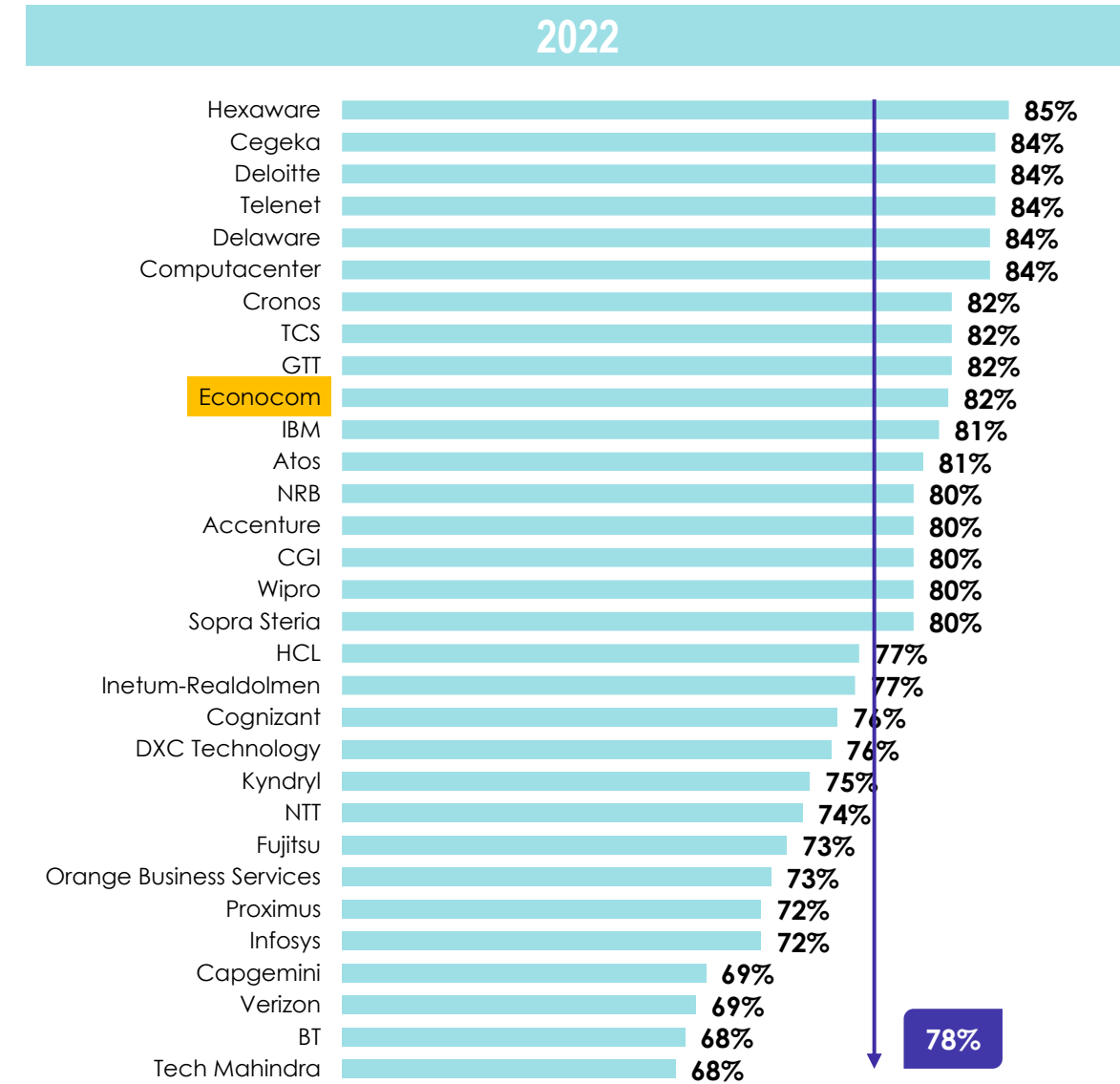
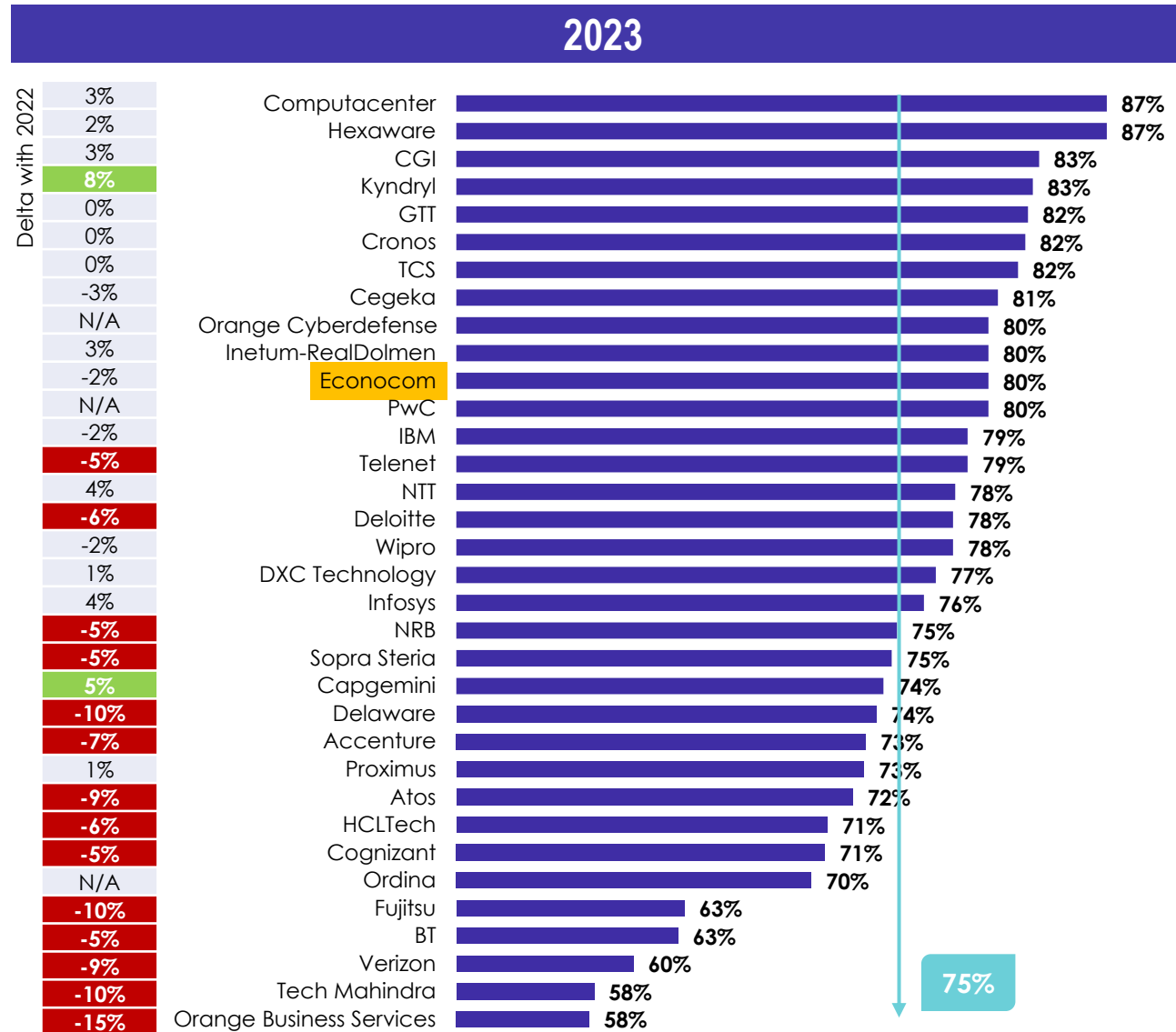
Key Performance Indicators (KPIs)

General Satisfaction



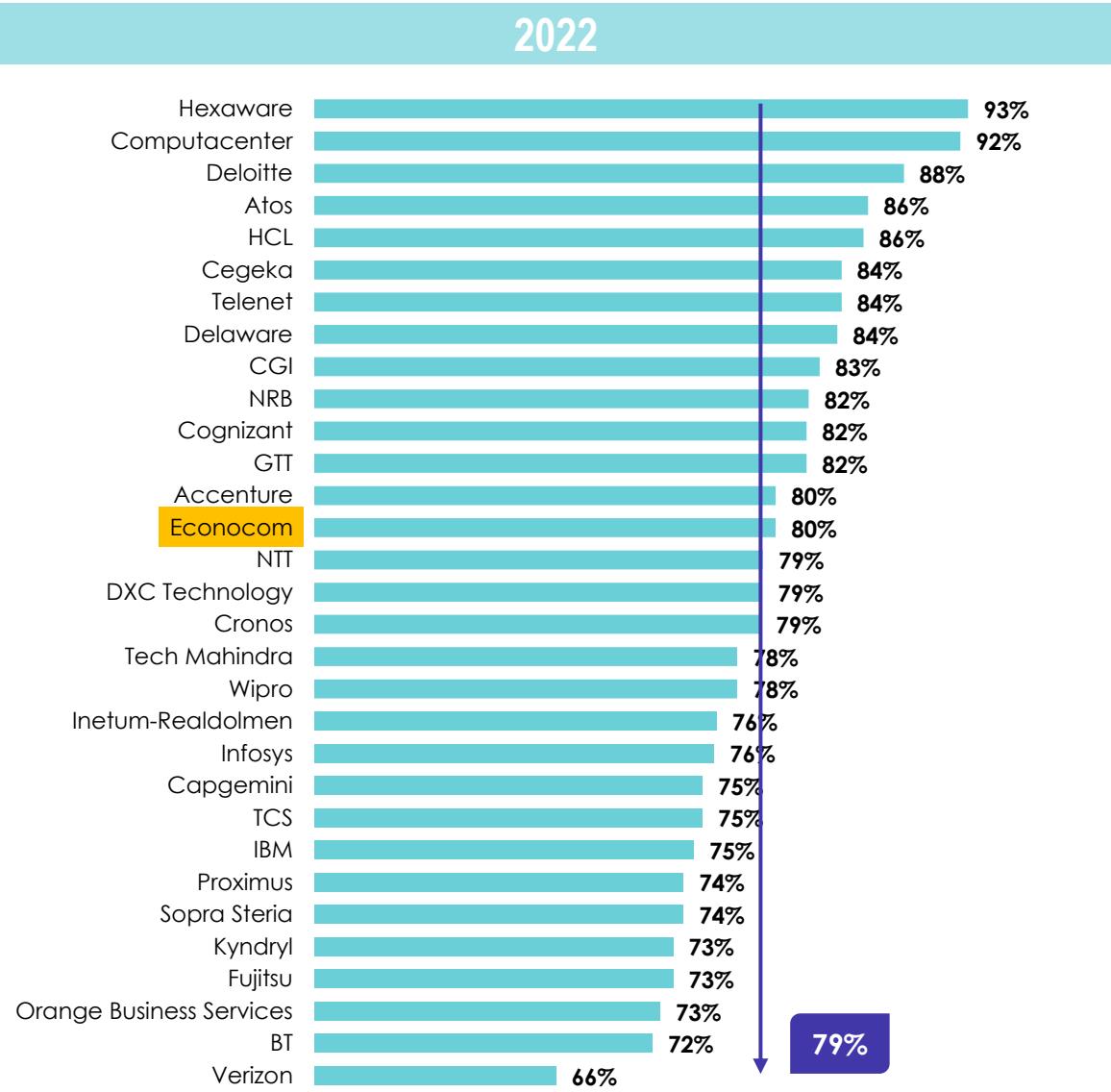
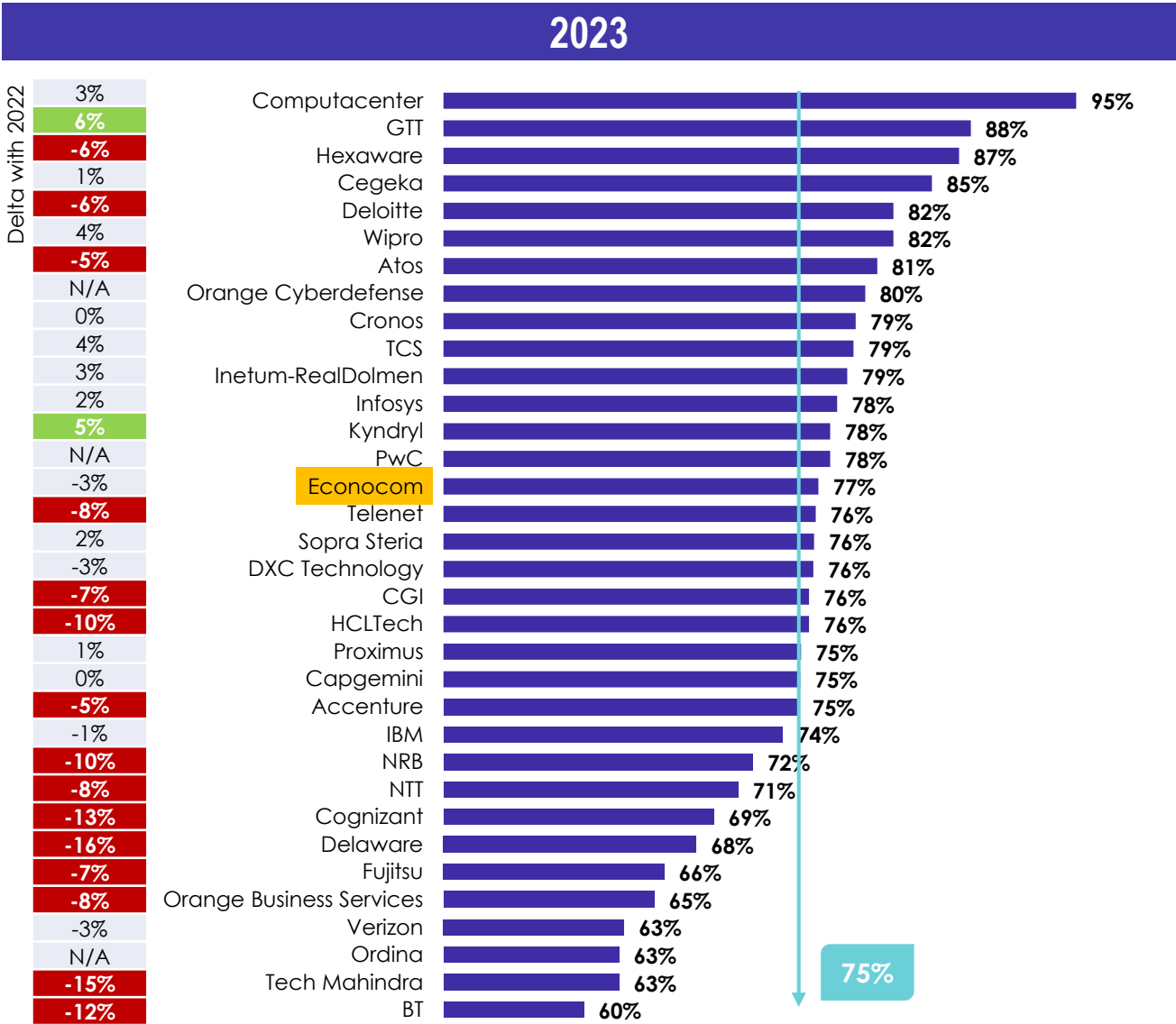
KPI 1: Service Delivery Quality

The service delivery is of good quality.



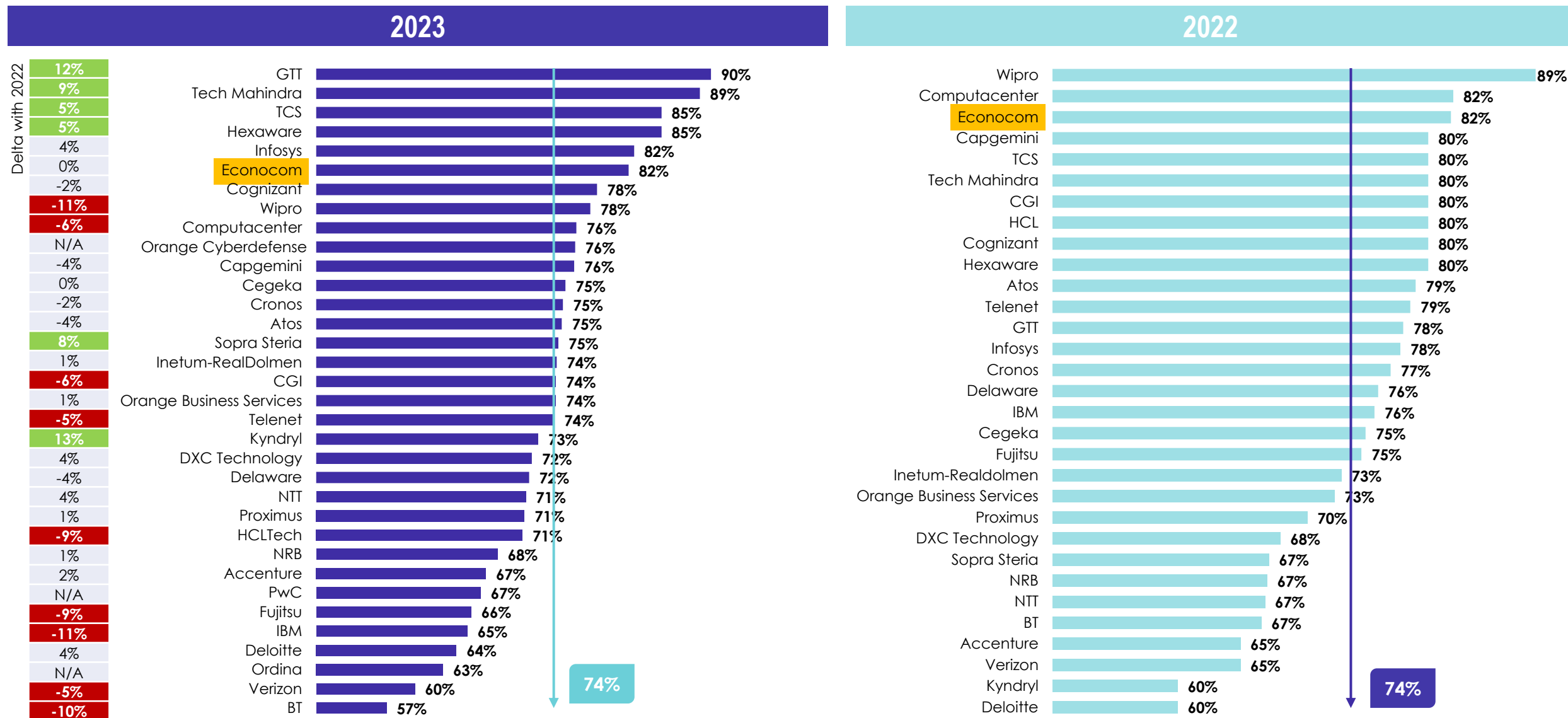
KPI 2: Account Management Quality

The account management is of good quality.



KPI 3: Price Level

The price of the IT services provided to us is in line with the market.

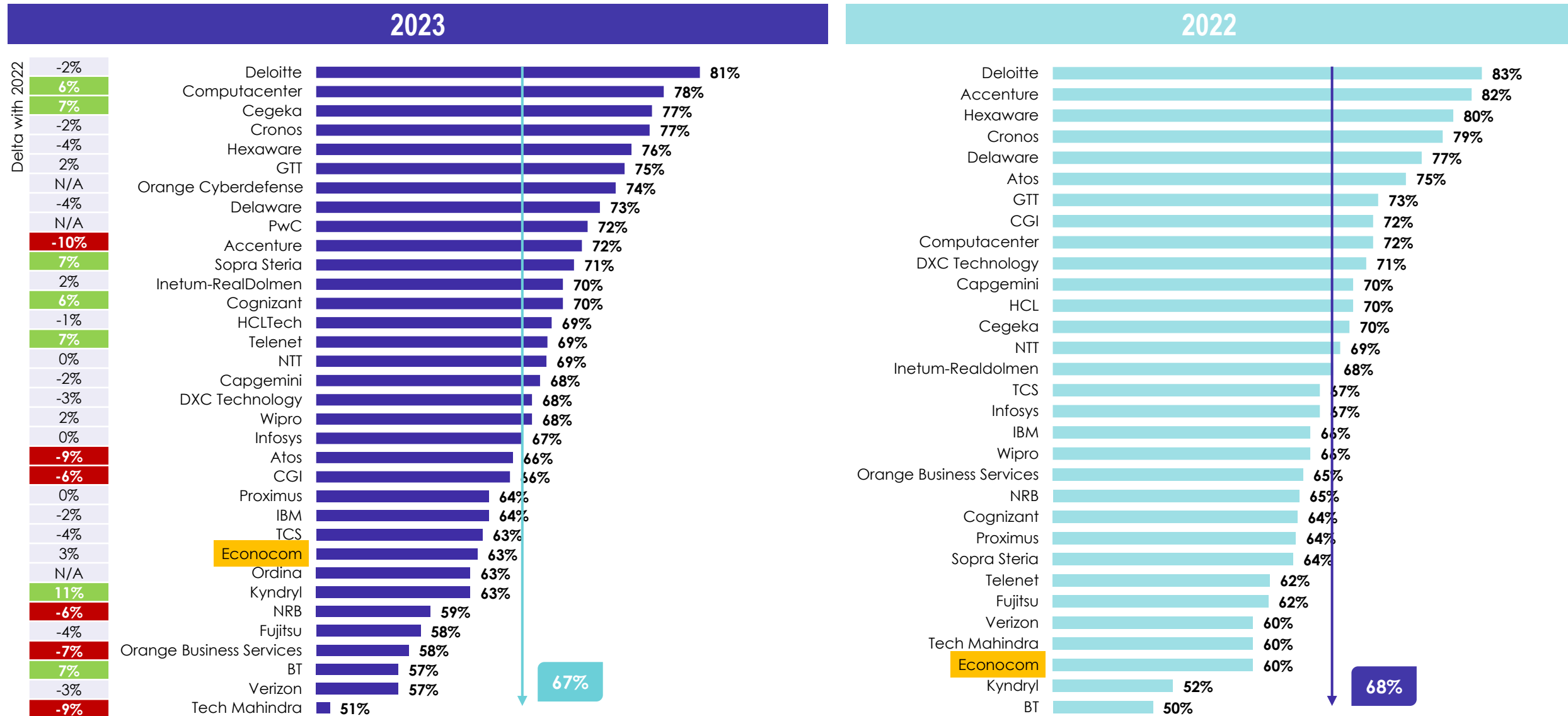


KPI 4: Transformative Innovation

The service provider has the ability to drive transformational change by using innovative technologies and services.


03

Key Performance Indicators



Market average

● 5% or more above average
 ● 5% or more below average

Service Provider	General Satisfaction	Service Delivery	Account Management	Price Level	Transformative Innovation
Computacenter	85%	87%	95%	76%	78%
Hexaware	84%	87%	87%	85%	76%
TCS	83%	82%	79%	85%	63%
GTT	82%	82%	88%	90%	75%
Cegeka	80%	81%	85%	75%	77%
Cronos	79%	82%	79%	75%	77%
Inetum-RealDolmen	78%	80%	79%	74%	70%
Deloitte	78%	78%	82%	64%	81%
Orange Cyberdefense	78%	80%	80%	76%	74%
Econocom 	77%	80%	77%	82%	63%
Infosys	76%	76%	78%	82%	67%
DXC Technology	76%	77%	76%	72%	68%
Kyndryl	76%	83%	78%	73%	63%
Wipro	76%	78%	82%	78%	68%
PwC	76%	80%	78%	67%	72%
Telenet	75%	79%	76%	74%	69%
Capgemini	75%	74%	75%	76%	68%
CGI	75%	83%	76%	74%	66%
NTT	73%	78%	71%	71%	69%
HCLTech	73%	71%	76%	71%	69%
Sopra Steria	73%	75%	76%	75%	71%
Proximus	72%	73%	75%	71%	64%
NRB	72%	75%	72%	68%	59%
Delaware	71%	74%	68%	72%	73%
Accenture	71%	73%	75%	67%	72%
IBM	69%	79%	74%	65%	64%
Atos	69%	72%	81%	75%	66%
Cognizant	68%	71%	69%	78%	70%
Ordina	68%	70%	63%	63%	63%
BT	65%	63%	60%	57%	57%
Orange Business Services	60%	58%	65%	74%	58%
Fujitsu	60%	63%	66%	66%	58%
Tech Mahindra	58%	58%	63%	89%	51%
Verizon	55%	60%	63%	60%	57%
Average	73%	75%	75%	74%	67%

Market comparison with last year




Up 5% or more compared to last year



Down 5% or more compared to last year

03

Key Performance Indicators

Service Provider	General Satisfaction	Service Delivery	Account Management	Price Level	Transformative Innovation
Computacenter	-1%	3%	3%	-6%	6%
Hexaware	-1%	2%	-6%	5%	-4%
TCS	0%	0%	4%	5%	-4%
GTT	4%	0%	6%	12%	2%
Cegeka	-1%	-3%	1%	0%	7%
Cronos	-1%	0%	0%	-2%	-2%
Inetum-RealDolmen	6%	3%	3%	1%	2%
Deloitte	-5%	-6%	-6%	4%	-2%
Econocom 	2%	-2%	-3%	0%	3%
Infosys	2%	4%	2%	4%	0%
DXC Technology	2%	1%	-3%	4%	-3%
Kyndryl	8%	8%	5%	13%	11%
Wipro	-2%	-2%	4%	-11%	2%
Telenet	-2%	-5%	-8%	-5%	7%
Capgemini	1%	5%	0%	-4%	-2%
CGI	2%	3%	-7%	-6%	-6%
NTT	3%	4%	-8%	4%	0%
HCLTech	-3%	-6%	-10%	-9%	-1%
Sopra Steria	-2%	-5%	2%	8%	7%
Proximus	5%	1%	1%	1%	0%
NRB	-6%	-5%	-10%	1%	-6%
Delaware	-8%	-10%	-16%	-4%	-4%
Accenture	-7%	-7%	-5%	2%	-10%
IBM	-4%	-2%	-1%	-11%	-2%
Atos	-9%	-9%	-5%	-4%	-9%
Cognizant	-8%	-5%	-13%	-2%	6%
BT	-1%	-5%	-12%	-10%	7%
Orange Business Services	-10%	-15%	-8%	1%	-7%
Fujitsu	-15%	-10%	-7%	-9%	-4%
Tech Mahindra	-12%	-10%	-15%	9%	-9%
Verizon	-8%	-9%	-3%	-5%	-3%

KPI Drilldown: Econocom

Service Provider	General Satisfaction	Service Delivery	Account Management	Price Level	Transformative Innovation
Econocom	Very satisfied	Totally agree	Agree	Somewhat agree	Agree
Econocom	Very satisfied	Totally agree	Somewhat agree	Agree	Somewhat agree
Econocom	Very satisfied	Totally agree	Totally agree	Totally agree	Agree
Econocom	Very satisfied	Totally agree	Totally agree	Totally agree	Totally agree
Econocom	Satisfied	Totally agree			Agree
Econocom	Satisfied	Agree	Agree	Agree	Somewhat agree
Econocom	Satisfied	Agree	Agree	Agree	Disagree
Econocom	Satisfied	Agree	Agree	Agree	Agree
Econocom	Somewhat satisfied	Agree	Agree	Somewhat agree	Somewhat agree
Econocom	Somewhat satisfied	Somewhat agree	Agree	Totally agree	Somewhat disagree
Econocom	Somewhat satisfied	Somewhat agree	Agree	Agree	Somewhat agree
Econocom	Somewhat satisfied	Somewhat agree	Somewhat agree	Somewhat agree	Agree
Econocom	Somewhat unsatisfied	Somewhat disagree	Somewhat disagree	Totally agree	Disagree

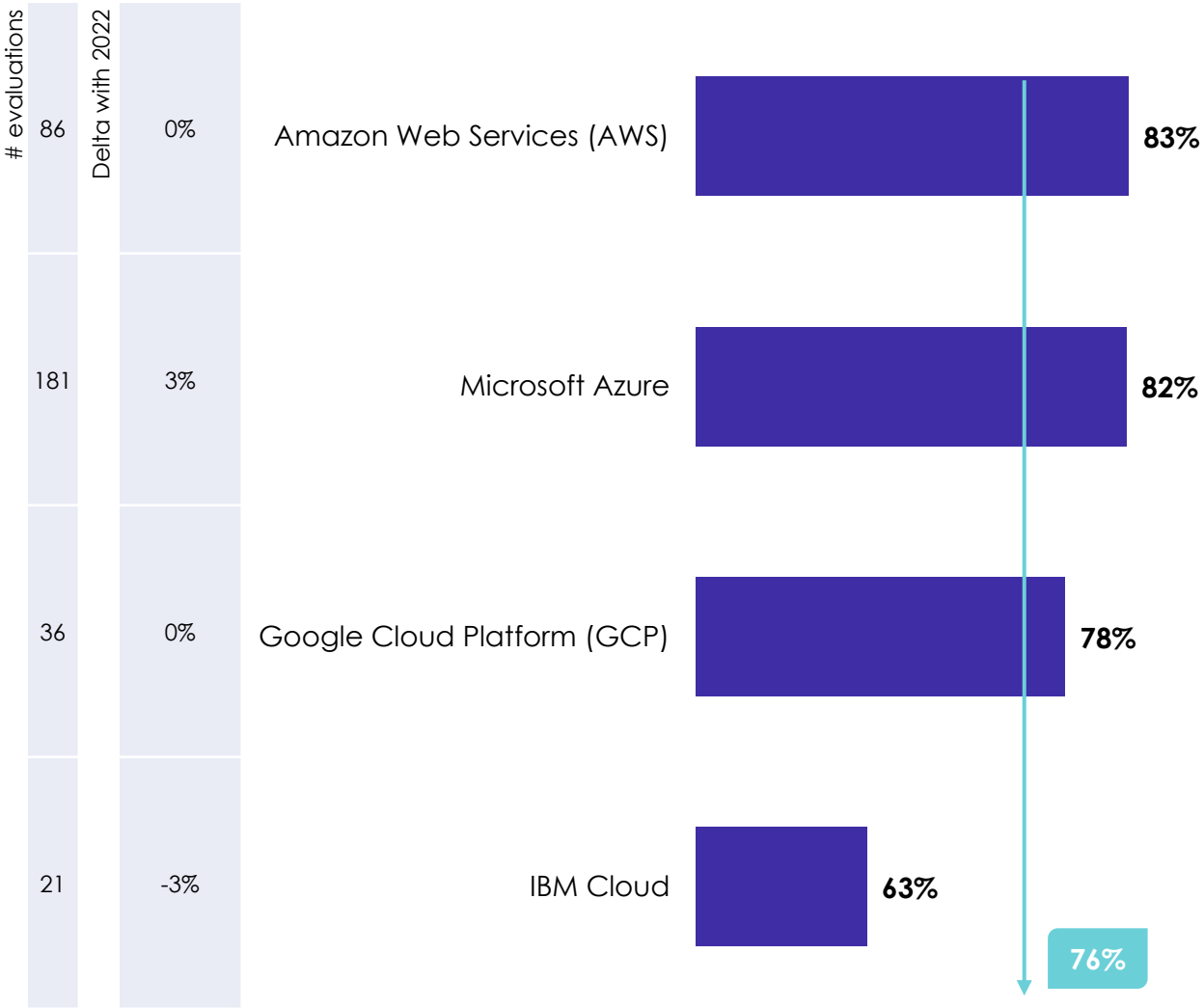
An abstract graphic on the left side of the slide, featuring a series of concentric, curved lines in various shades of blue and white, creating a sense of motion and depth.

04

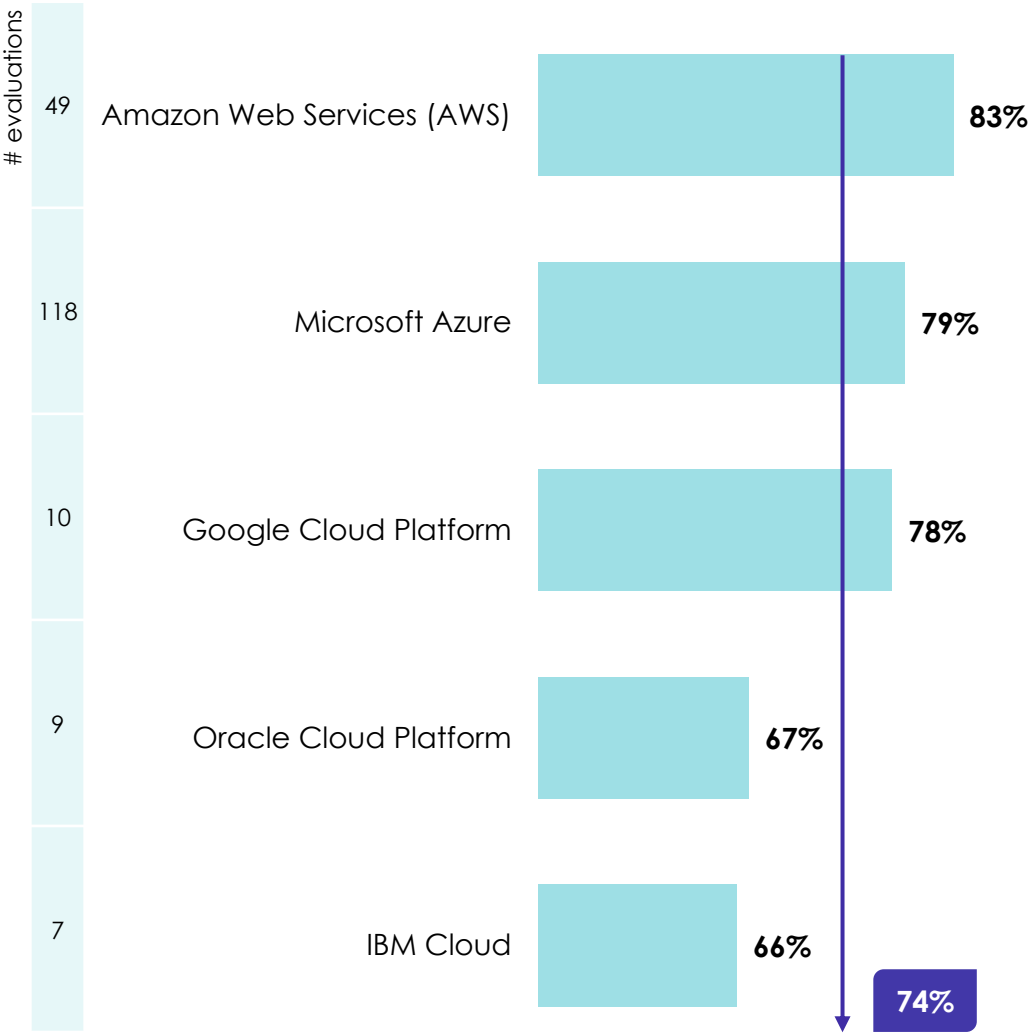
Cloud provider performance Infrastructure cloud platforms

Infrastructure cloud platforms (Comparison with 2022)

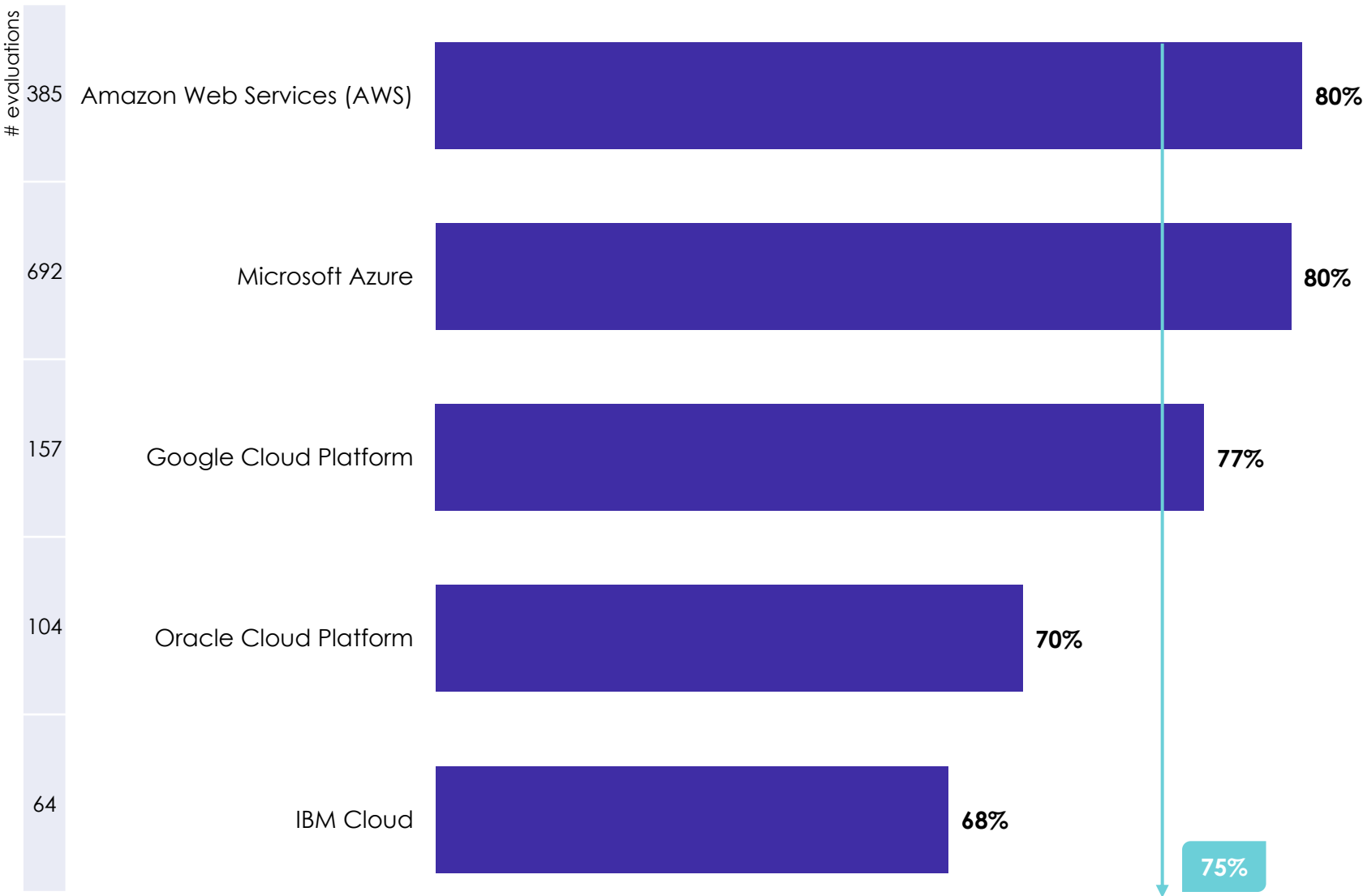
2023



2022



Infrastructure cloud platforms (Europe 2022)



KEY TO SCORES	
Very unsatisfied	0%
Unsatisfied	20%
Somewhat unsatisfied	40%
Somewhat satisfied	60%
Satisfied	80%
Very satisfied	100%

An abstract graphic on the left side of the slide, featuring a series of concentric, curved lines in various shades of blue and white, creating a sense of motion and depth.

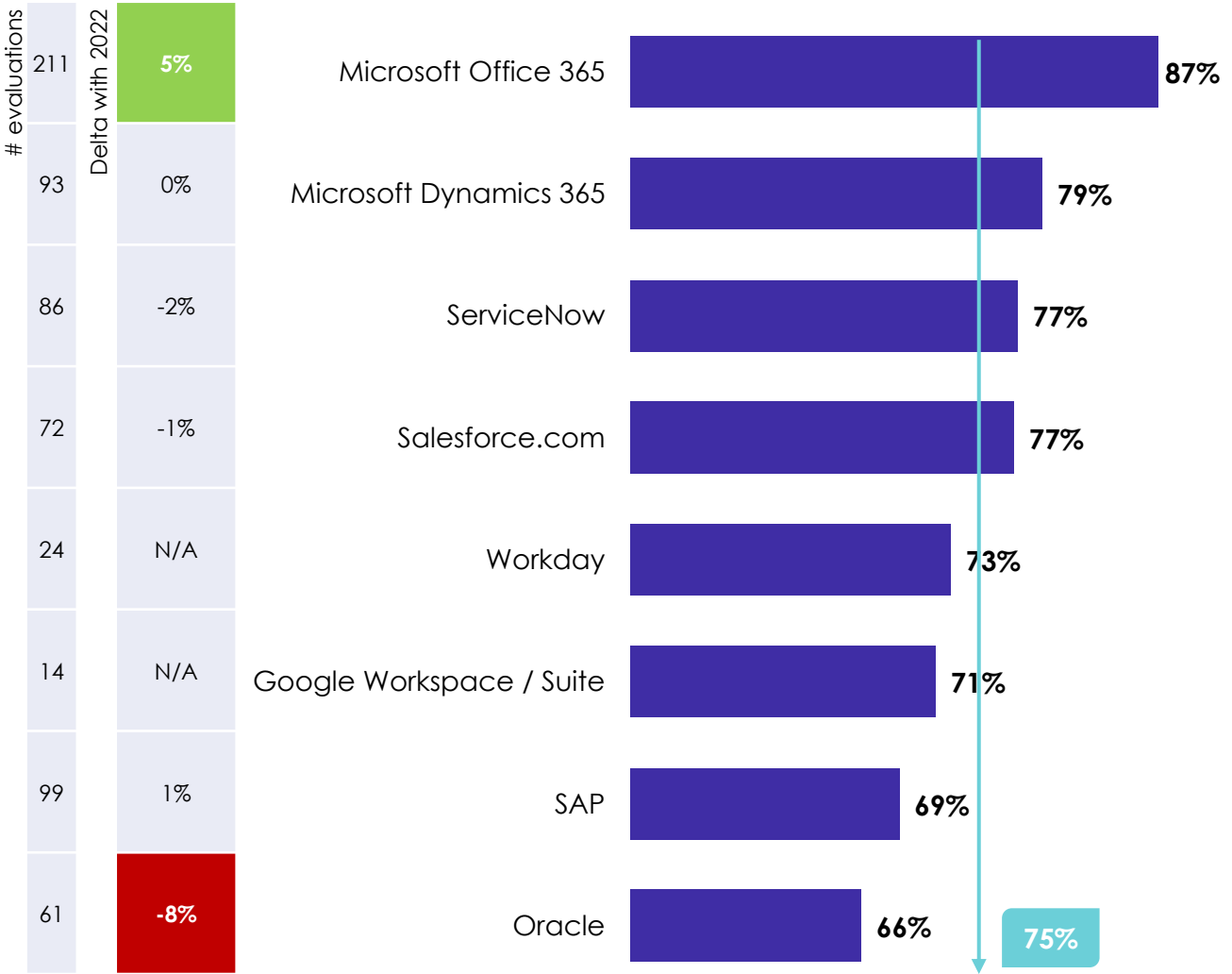
04

Cloud provider performance

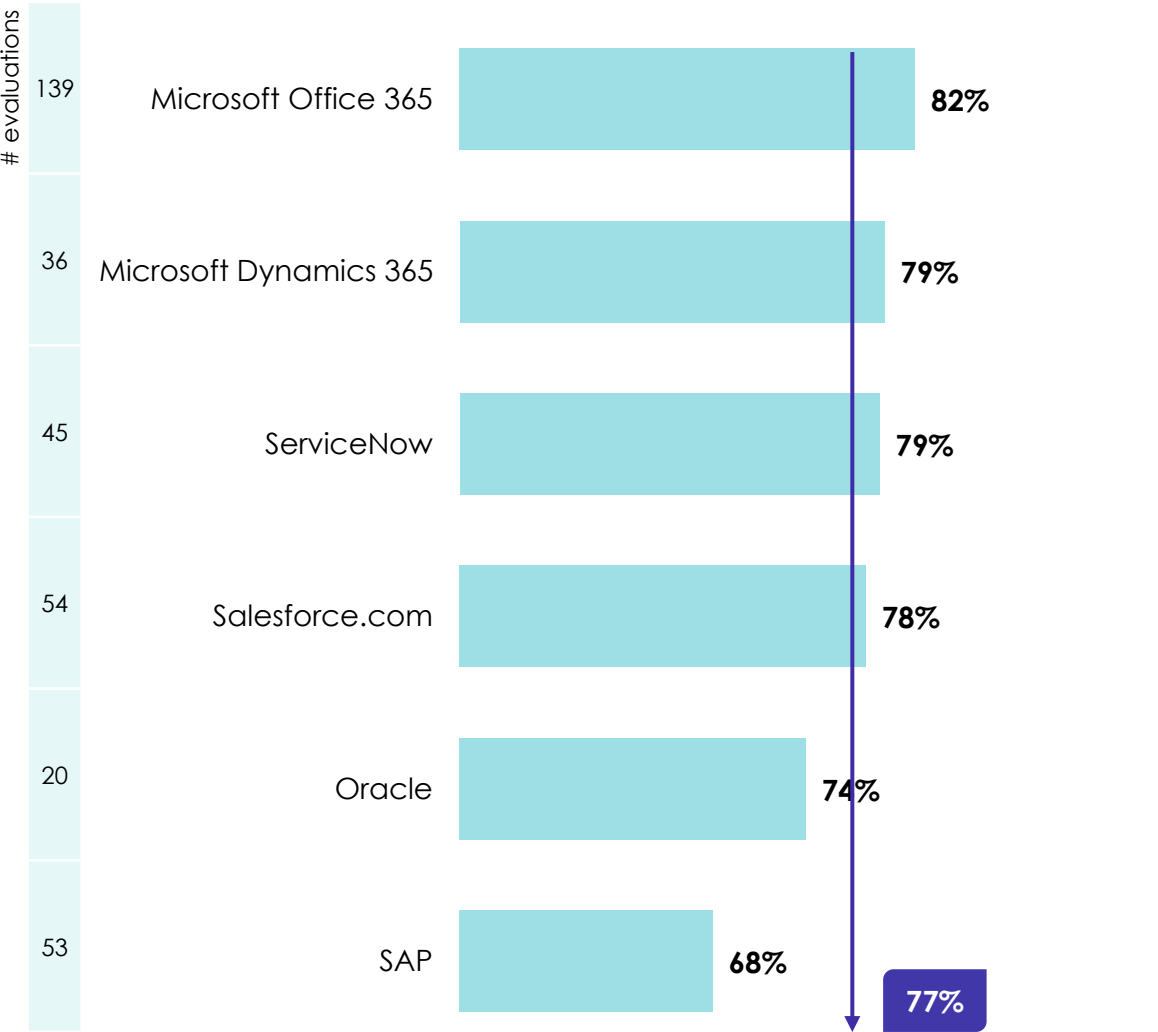
Software cloud platforms

Software cloud platforms (Comparison with 2022)

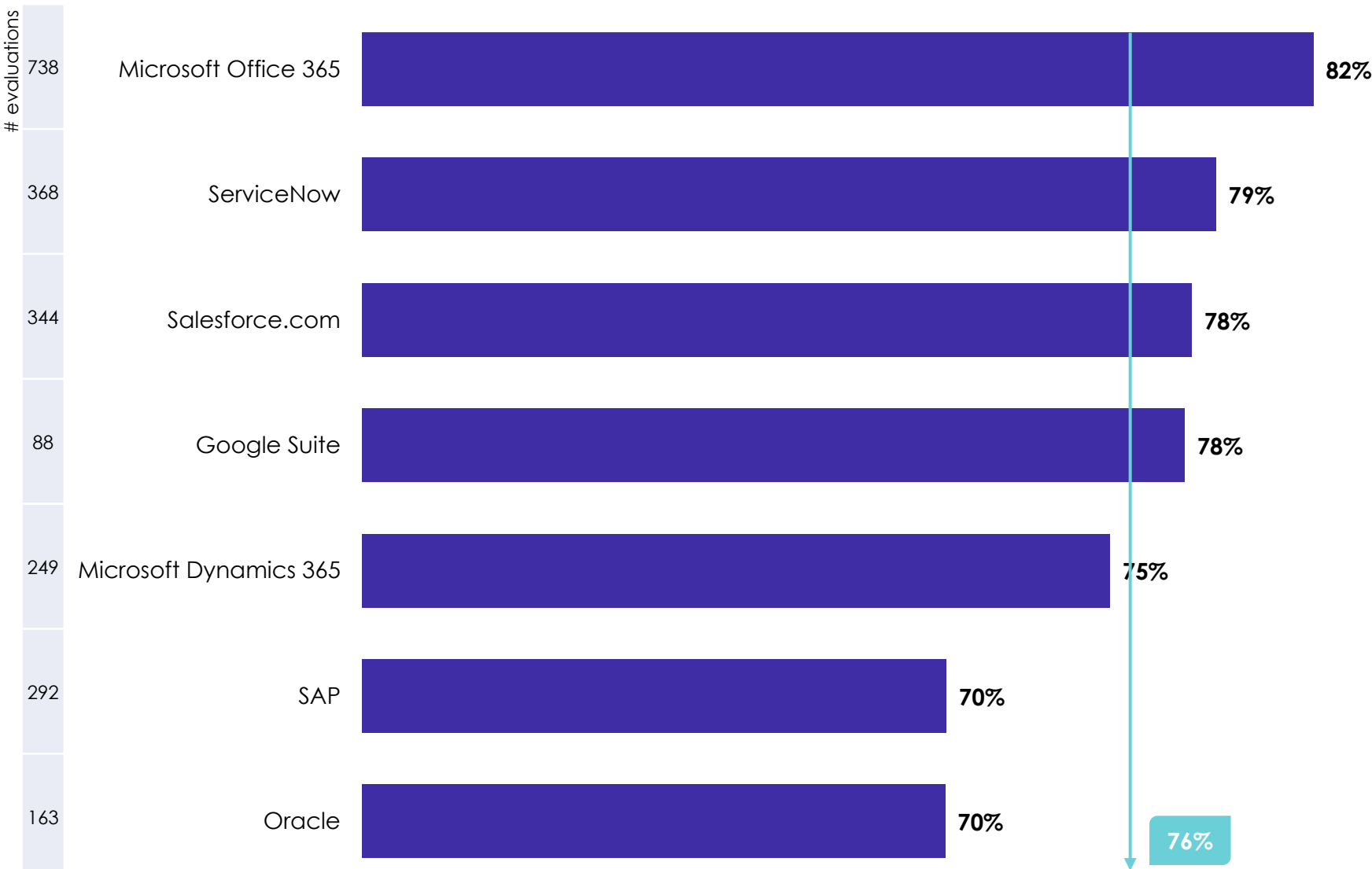
2023



2022



Software cloud platforms (Europe 2022)



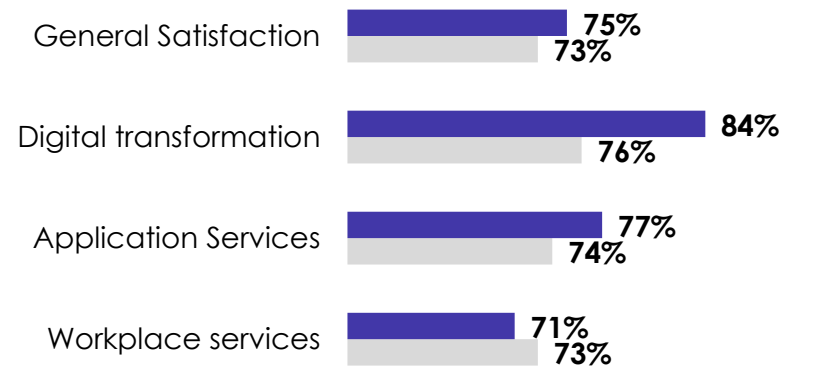
KEY TO SCORES	
Very unsatisfied	0%
Unsatisfied	20%
Somewhat unsatisfied	40%
Somewhat satisfied	60%
Satisfied	80%
Very satisfied	100%



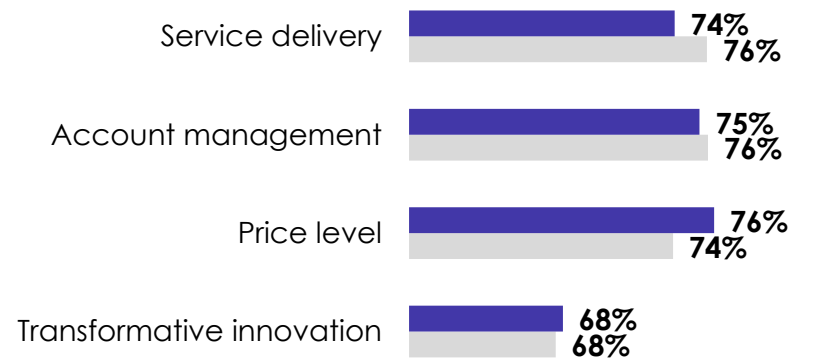
05

Competitor analysis

Satisfaction

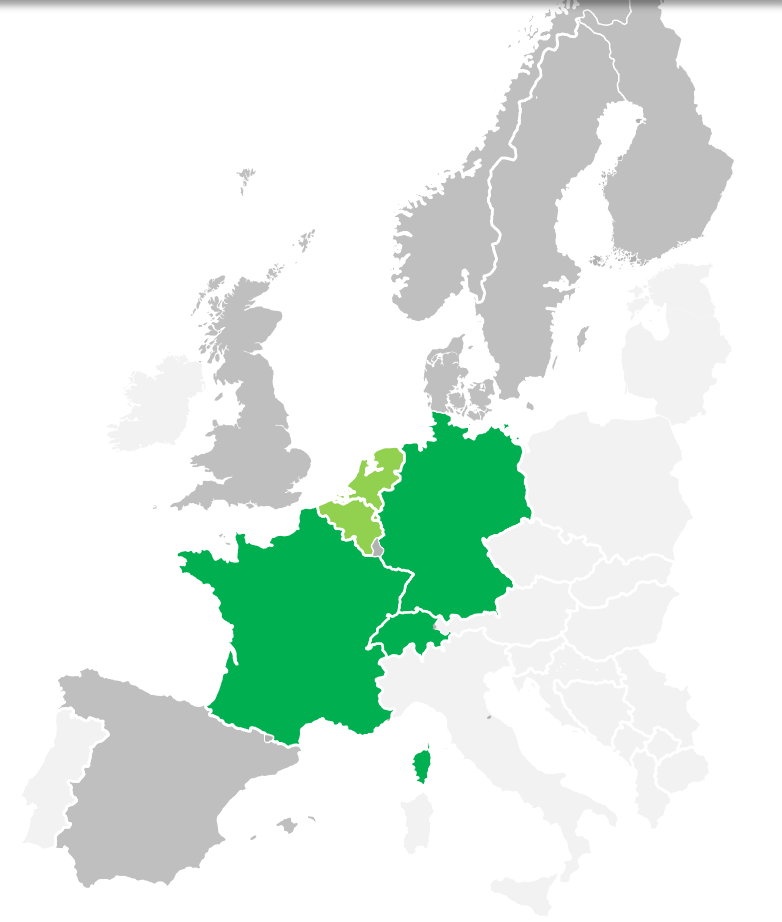
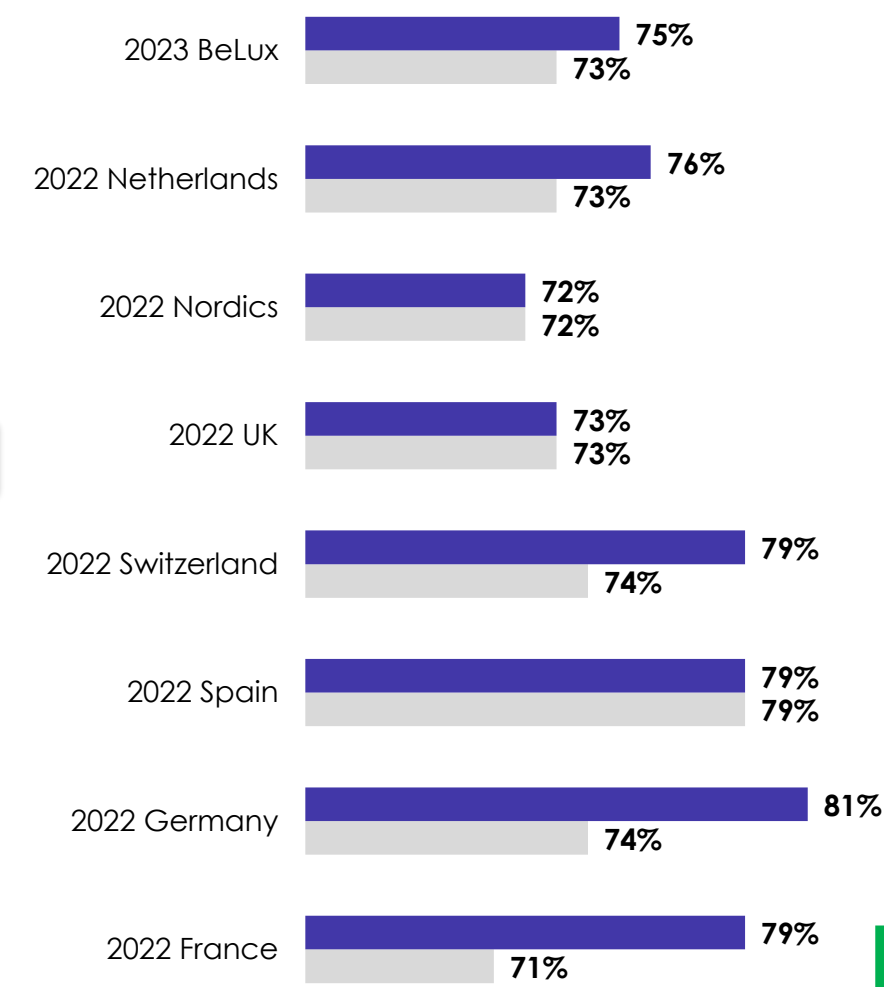


Key Performance Indicators



Key ● Capgemini score ● Average score

European performance

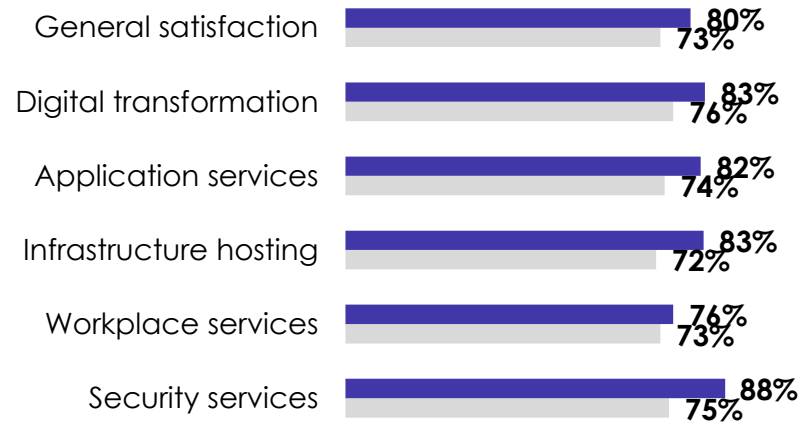


Exceptional performer Strong performer Listed

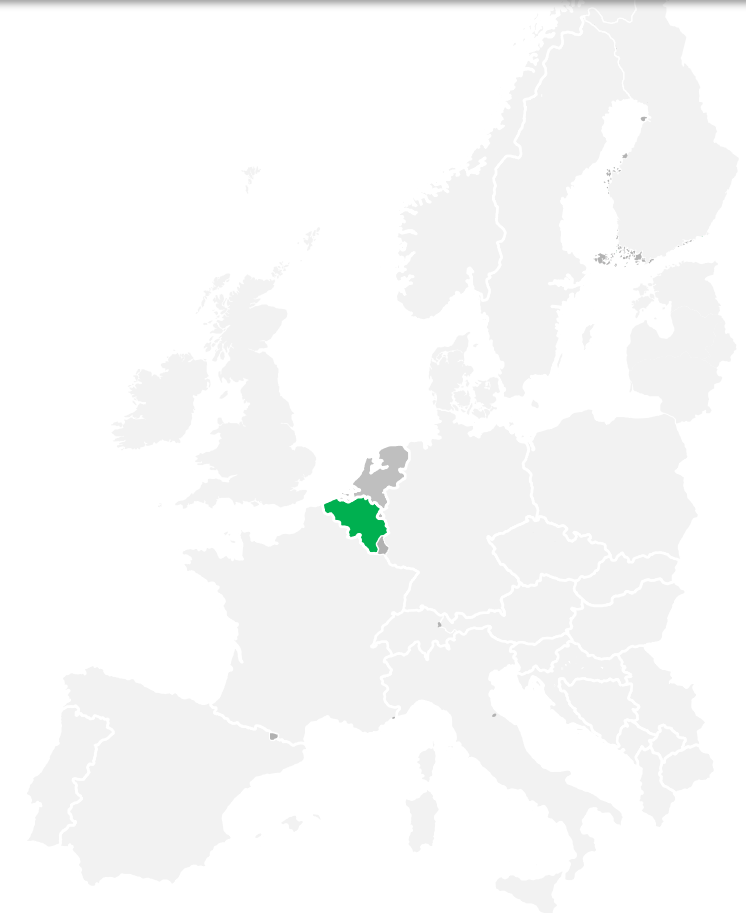
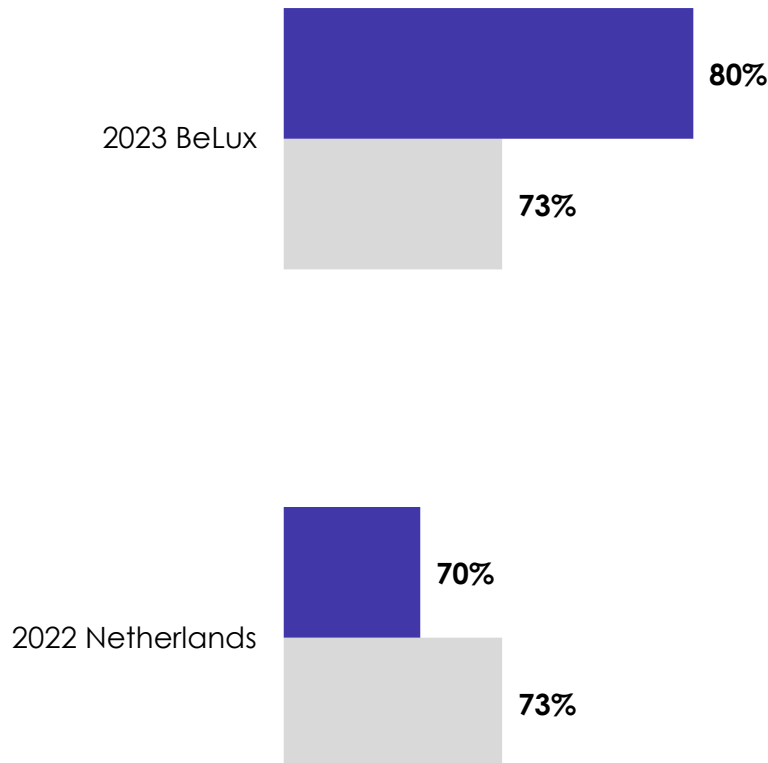
Competitor analysis: Cegeka

x

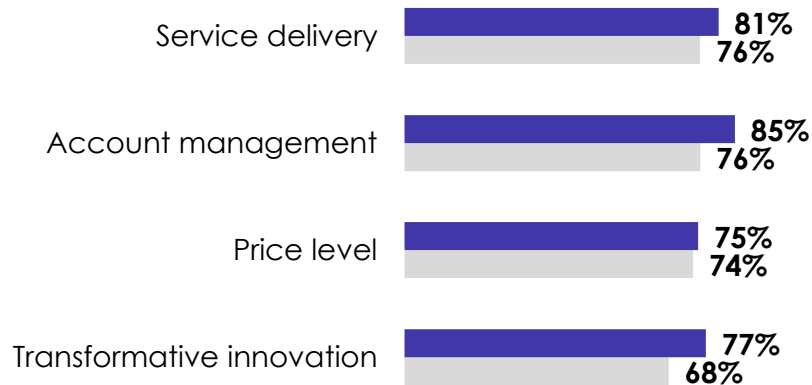
Satisfaction



European performance



Key Performance Indicators



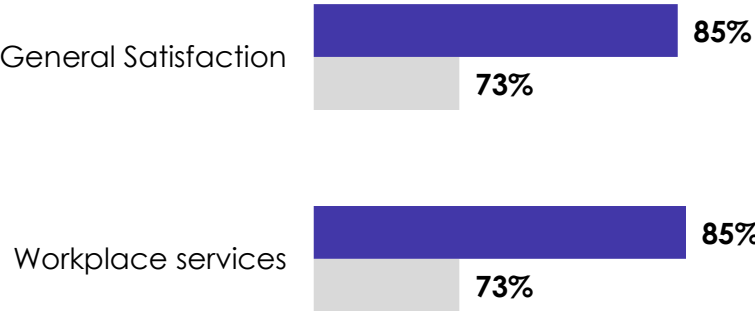
Key ● Cegeka score ● Average score

Exceptional performer

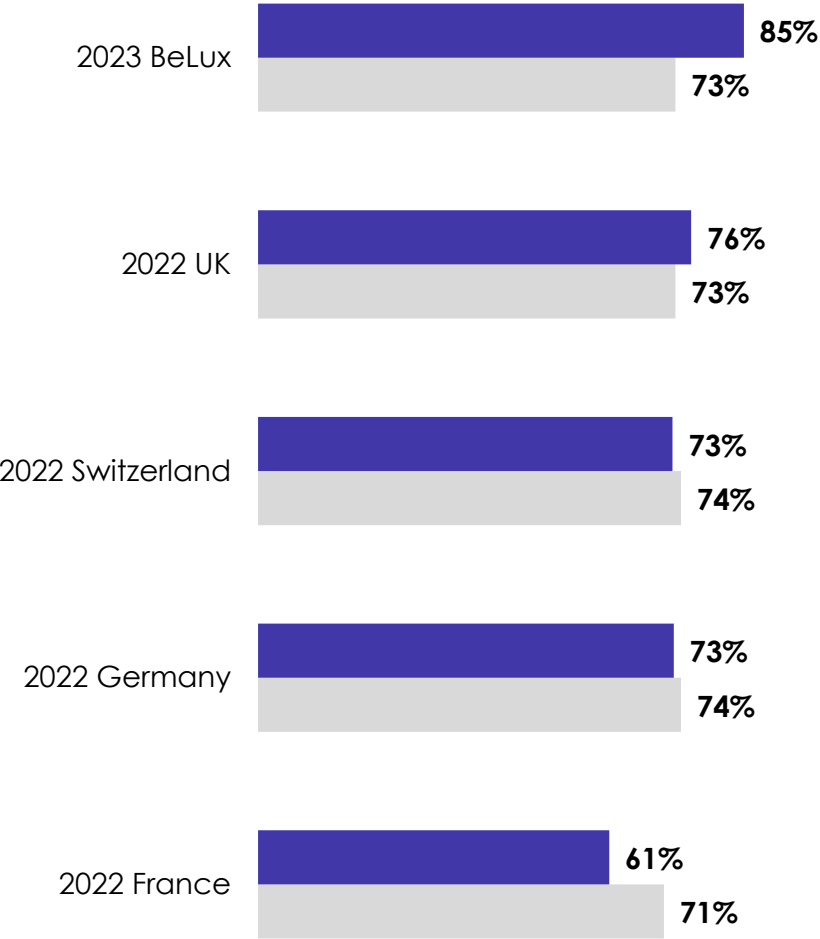
Strong performer

Listed

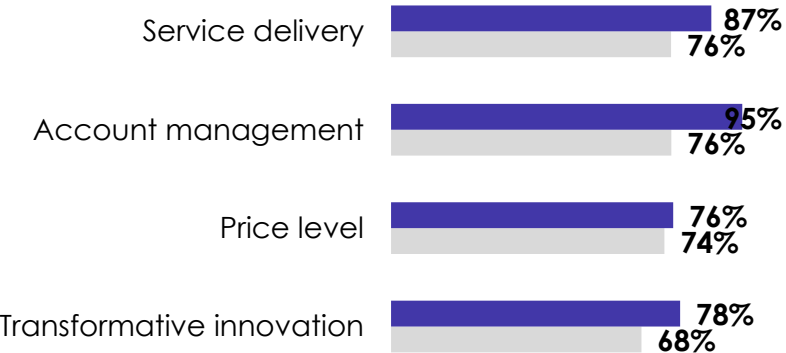
Satisfaction



European performance



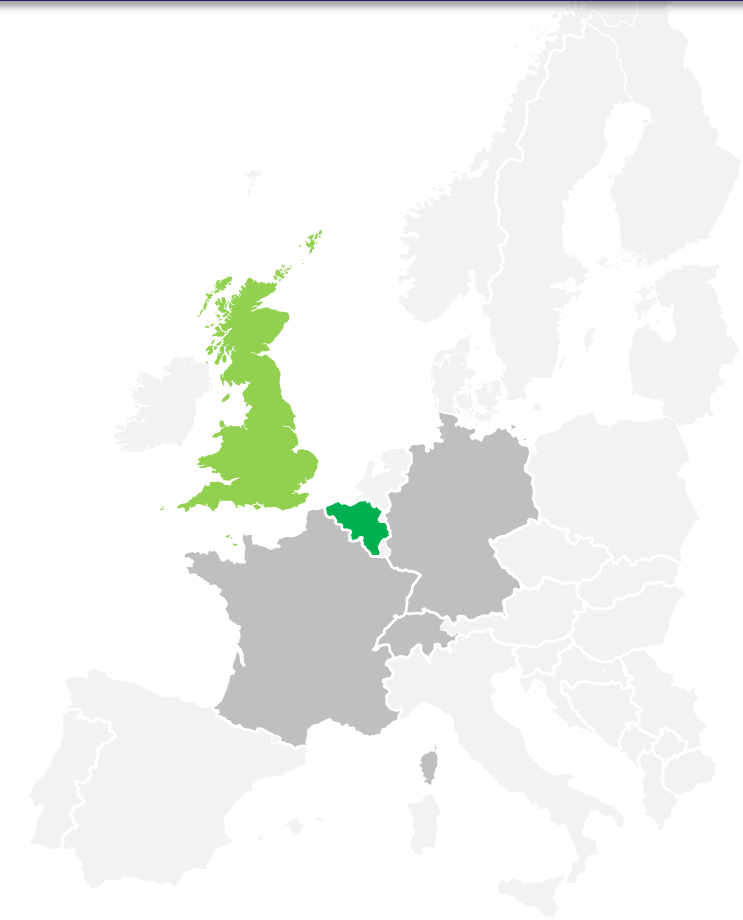
Key Performance Indicators



Key

Computacenter score

Average score

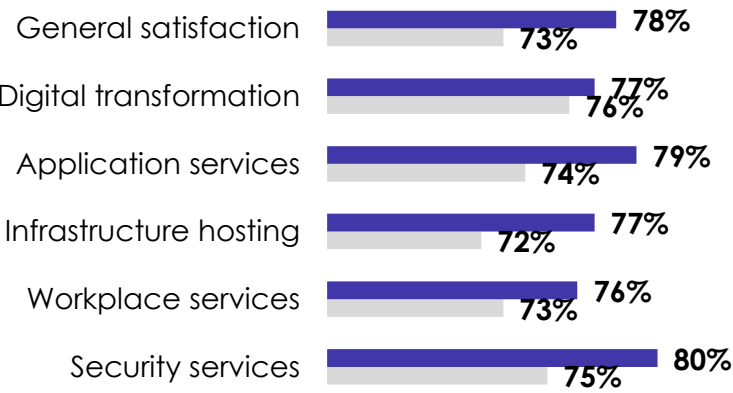


Exceptional performer

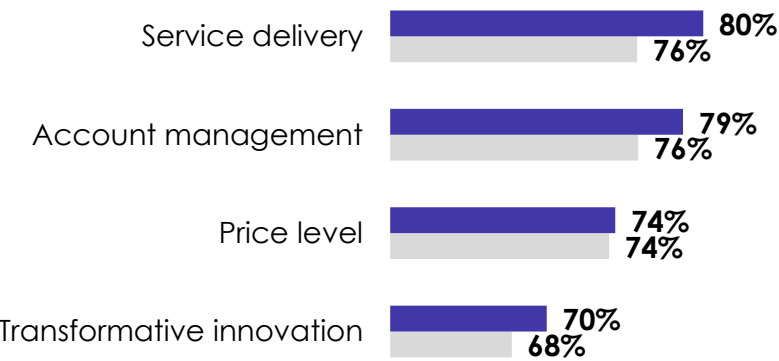
Strong performer

Listed

Satisfaction



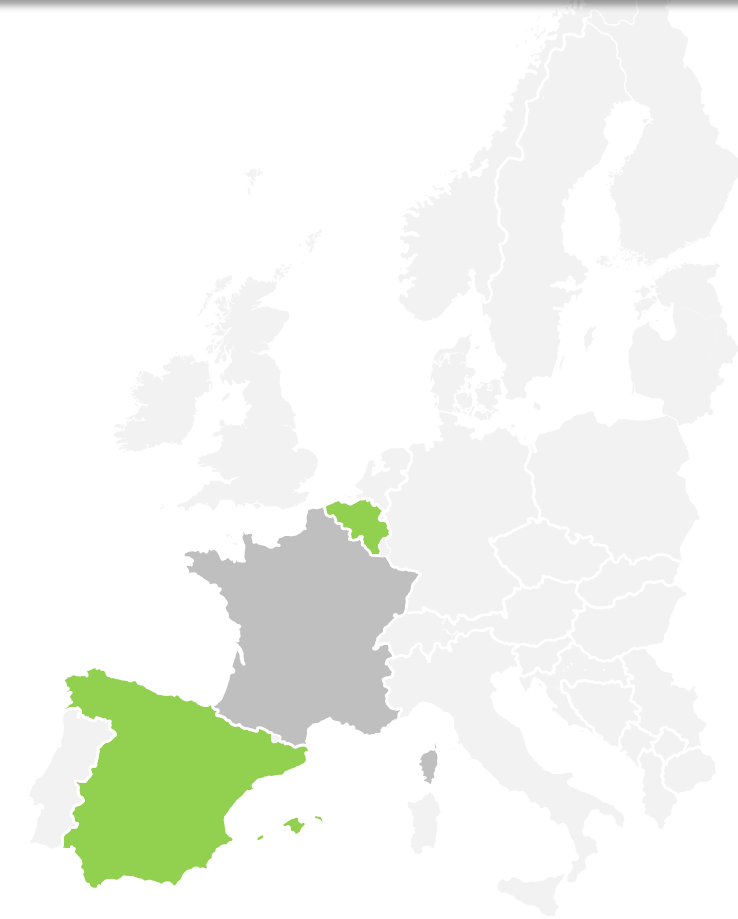
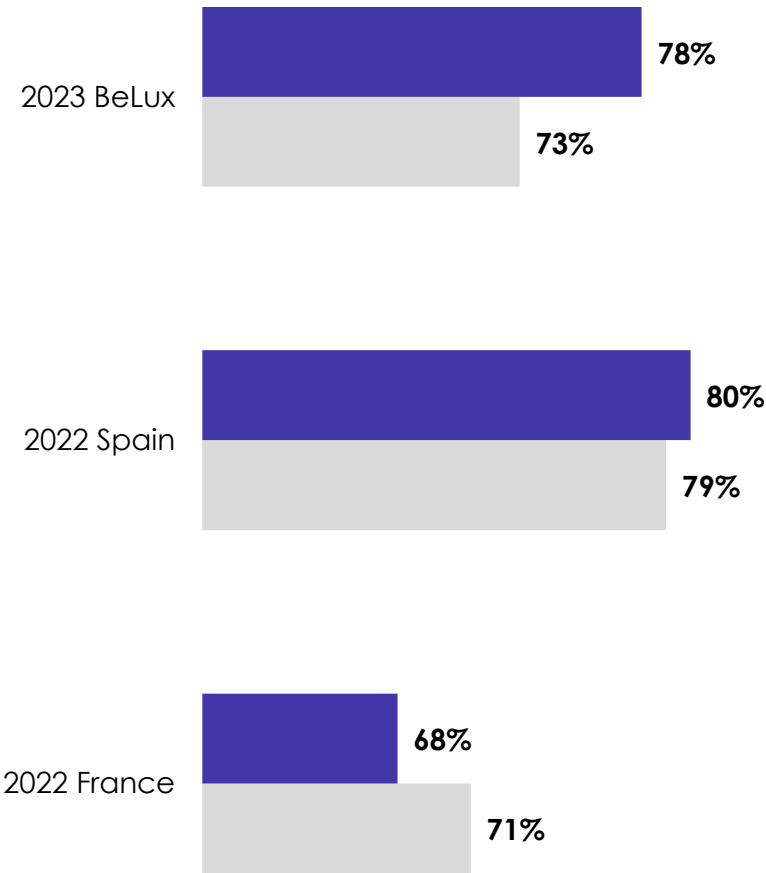
Key Performance Indicators



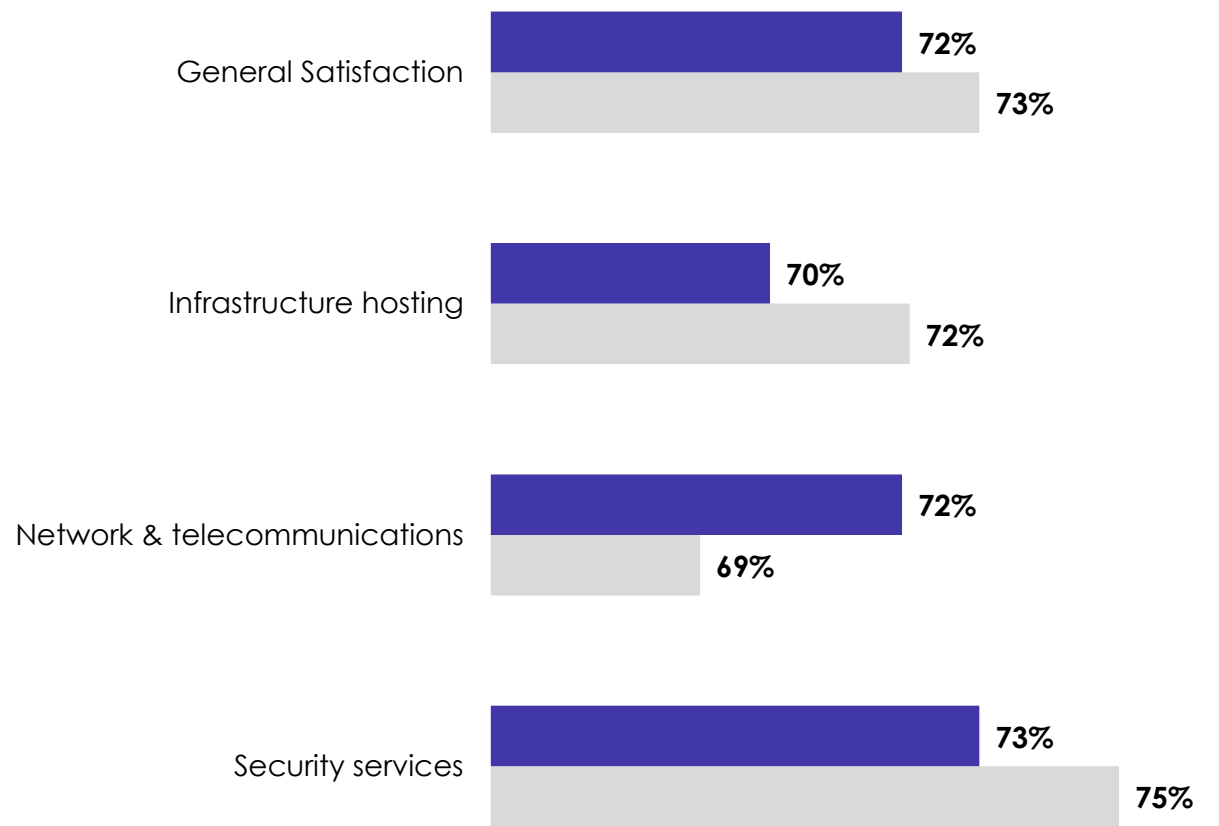
Key

● Inetum-RealDolmen score ● Average score

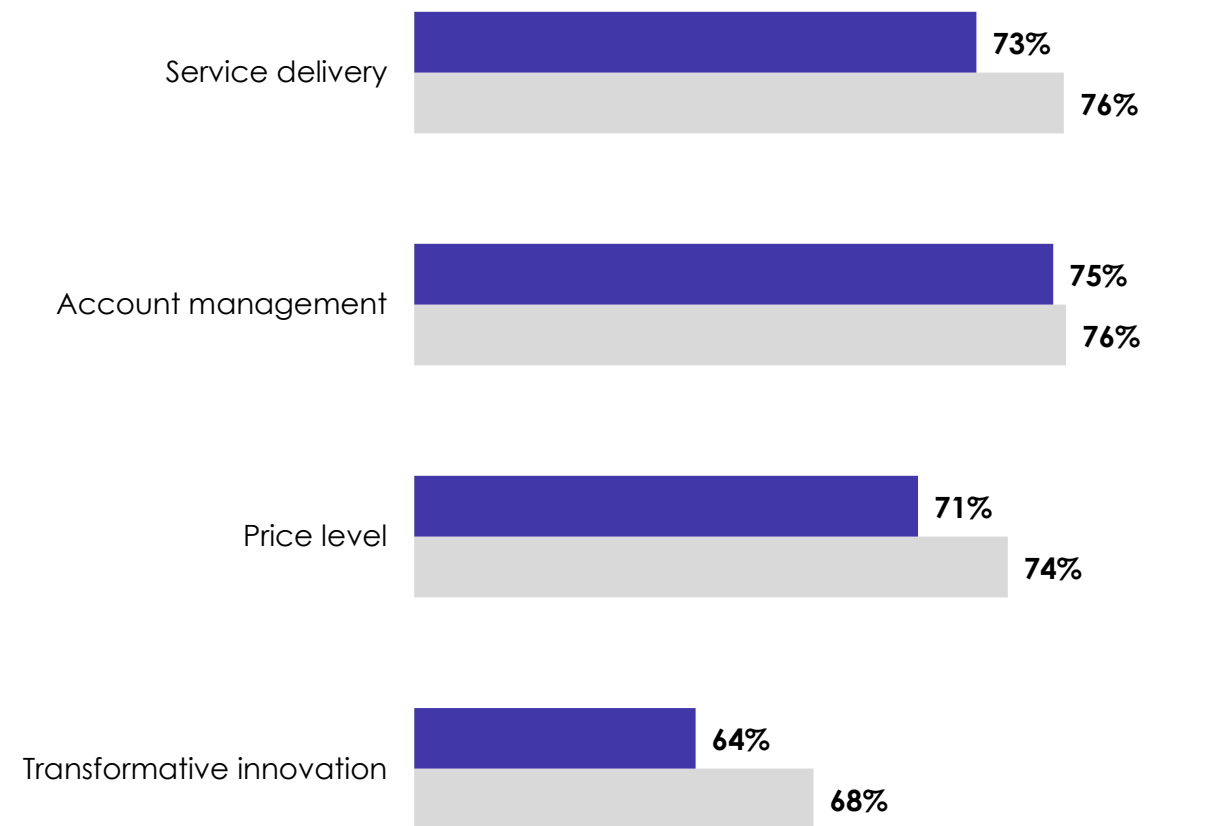
European performance



Satisfaction



Key Performance Indicators



Key ● Proximus score ● Average score

Competitor overview: Satisfaction and KPIs



5% or more above average



5% or more below average

Competitor
analysis

		COMPETITORS						
		Econocom	Capgemini	Cegeka	Computacenter	Inetum-RealDolmen	Proximus	Average
Satisfaction	General Satisfaction	77%	75%	80%	85%	78%	72%	73%
	Digital Transformation		84%	83%		77%		76%
	Application Services		77%	82%		79%		74%
	Infrastructure Hosting			83%		77%	70%	72%
	Workplace Services	77%	71%	76%	85%	76%		73%
	Network & Telecommunications						72%	69%
	Security Services			88%		80%	73%	75%
KPIs	Service Delivery	80%	74%	81%	87%	80%	73%	75%
	Account Management	77%	75%	85%	95%	79%	75%	75%
	Price Level	82%	76%	75%	76%	74%	71%	74%
	Transformative Innovation	63%	68%	77%	78%	70%	64%	67%

Competitor overview: Europe

● 5% or more above average ● 5% or more below average

		COMPETITORS					
	Econocom	Capgemini	Cegeka	Computacenter	Inetum-RealDolmen	Proximus	Average
BeLux 2023	77%	75%	80%	85%	78%	72%	73%
Netherlands 2022		76%	70%				73%
Nordics 2022		72%					72%
United Kingdom 2022		73%		76%			73%
Switzerland 2022		79%		73%			74%
Spain 2022	73%	79%			80%		79%
Germany 2022		81%		73%			74%
France 2022	73%	79%		61%	68%		71%

An abstract graphic on the left side of the slide, featuring a series of concentric, curved lines in various shades of blue and white, creating a sense of motion and depth.

06

Recommendations & feedback

A strong performer in general satisfaction and workplace services which is your strength.

The main focus for further improvement should be on the following:

- Service Delivery. Your score of 80% is higher than market average (75%) but lower than Computacenter (87%), Cegeka (81%) and TCS (82%), who are competitors in workplace services.
- Account Management. Your score of 77% is slightly higher than market average (75%) but significantly lower than Computacenter (95%), Cegeka (85%) and TCS (79%).
- Transformative innovation. While less important than service delivery and account management, this KPI is at 63%, below market average.

Being a strong performer in workplace services means there are opportunities when looking at renewals of the companies that score low. The difference in satisfaction is 17% which is significant.

The background of the slide features a dynamic, abstract pattern of wavy, flowing lines in various shades of blue and purple. These lines create a sense of movement and depth, curving and swirling across the frame. A solid dark blue rectangular box is positioned on the left side, serving as a backdrop for the text.

Thank you!

Please let us know if you have any questions.

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