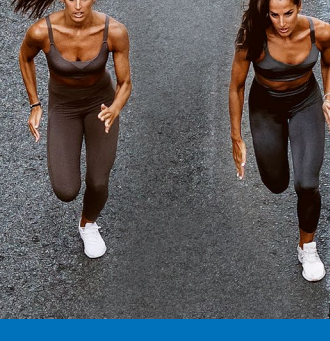




NTT

2020 Global Managed Services Report Expertise and Service Provision

How organizations adopt smart sourcing to navigate with confidence



Nowhere is a smart sourcing approach more relevant than now.

Forming a relationship with a service provider, who supports the shift from a focus on technology outcomes to business goals. Forming an 'smart' relationship will rapidly accelerate the standing of IT within the organization.

Organizations need technical expertise and flexibility, helping to scale up or down dependent upon the enterprise needs.

The study in numbers



Conducted by IDG Research

1,250

IT and business leaders



Across USA, Europe, UK, MEA, APAC and Australia

29

countries

from across 11 sectors, including:



Retail



Manufacturing



Finance and professional services



Education



Healthcare and pharmaceutical

Expertise and service continuity



Technical expertise has long been one of the most important criteria organizations consider when **selecting a service provider**.



Organizations primarily look for technical and industry expertise when selecting an MSP (44% and 30% respectively).

451 Research – Global crystal ball study



Cloud infrastructure and **security** are the leading technologies outsourced to service providers, and that looks set to rise over the next **18 months**. Dependency on cloud infrastructure will rise from 73% to 77%. While security will rise from 53% to 64%.

How NTT Ltd. helps

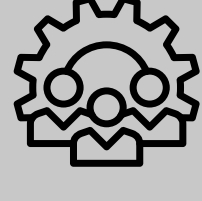
We can help you stay relevant in what is a very fast-changing world. We have the resources to help you design, deploy, and resource your ICT environment. Our world-class technical services teams can help you regardless of where you are in your digital and technology service journey.

Reducing complexity

Simplicity is a goal almost all organizations aspire to.



of respondents said they managed between **6 and 10 core vendor relationships**.



In a post **COVID-19 world**, almost half of service providers (**48%**) have, or are considering **renegotiating SLAs based on their actual ability to respond**.

Complexity has led to increased challenges, the top three being:

- Complexity around SLA and contractual terms and conditions**
- Performance issues that arise because of complexity**
- Challenges in vendors working together**

How NTT Ltd. helps

As one of the largest ICT organizations in the world, the breadth and depth of our products and services is unparalleled. We create efficiencies and optimize your IT environment, leading to better business outcomes.

Operational focus



Most organizations have a gap between the business and IT – they often operate as two distinct entities.



of IT and business teams **collaborate consistently** on digital transformation.

NTT Ltd.'s Digital Means Business Report.



When it comes to delivering **digital transformation strategy**, over a **fifth (22%)** of organizations operate in individual business functions.



of respondents said **aligning with business objectives** by exploring new technologies and workflows is a major workload.

NTT Ltd.'s Digital Means Business Report.

How NTT Ltd. helps

Whatever combination of people, processes, tools, and platforms you need, we'll help you turn your IT challenges into business opportunities. We focus on making sure stakeholders from across the organization are brought together to deliver outcomes that benefit the organization as a whole.

Business and IT convergence



Roles traditionally within the confines of IT, should be embedded across the enterprise. And that's important given that **business priorities** have a **big impact on IT decision making**.



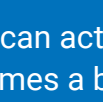
New product development is expected to be the most common impact on the **IT decision making** in the **next 12 months**.



Regulatory changes (**51%**), growing into new territories (**48%**) and skills shortages (**47%**) are the second, third and fourth most common impacts.

How NTT Ltd. helps

We can act as an important bridge between the capabilities of technology, and the outcomes a business requires. We can help you ensure business-led IT transformation activity is properly secured, scalable and delivered 'better together'.



Complete the self-assessment

Do your current service provider relationships help you unlock the power of end user transformation within your organization? We've developed the Managed Services Landscape assessment tool. It will help you get a sense for where you and your provider stand across the three themes identified in the research and what action you might need to take.

Together we can help your business rise above disruption

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