

International Press Conference 2008



IT Services Markets in Transformation

Business Innovation and Transformation Partners Gaining Market Share



**we
improve
IT**

Vienna, 09 September 2008

www.snt-world.com

Customer Demands on IT Consultants and Service Providers



Industrialisation of IT

- The industrialisation of IT is progressing at speed – increasing numbers of companies are purchasing standard IT services.

Innovation and Process Skills

- Innovation is a central aspect in the competitiveness of companies - IT is one of the driving factors for innovation, and thus also for sales and business results.
- Alongside product and service provision innovation, the importance of business process innovation is increasing.
- IT service providers must provide their customers with a high level of business process skills.

Customer Demands on IT Consultants and Service Providers



Change Management Skills

- The process of change is a permanent challenge for globally active companies. IT is expected to provide optimal support to such change processes.

Comprehensive Service Portfolio

- Many companies wish to keep the number of IT suppliers they use to a minimum in order to remain flexible.

Extensive Geographical Coverage

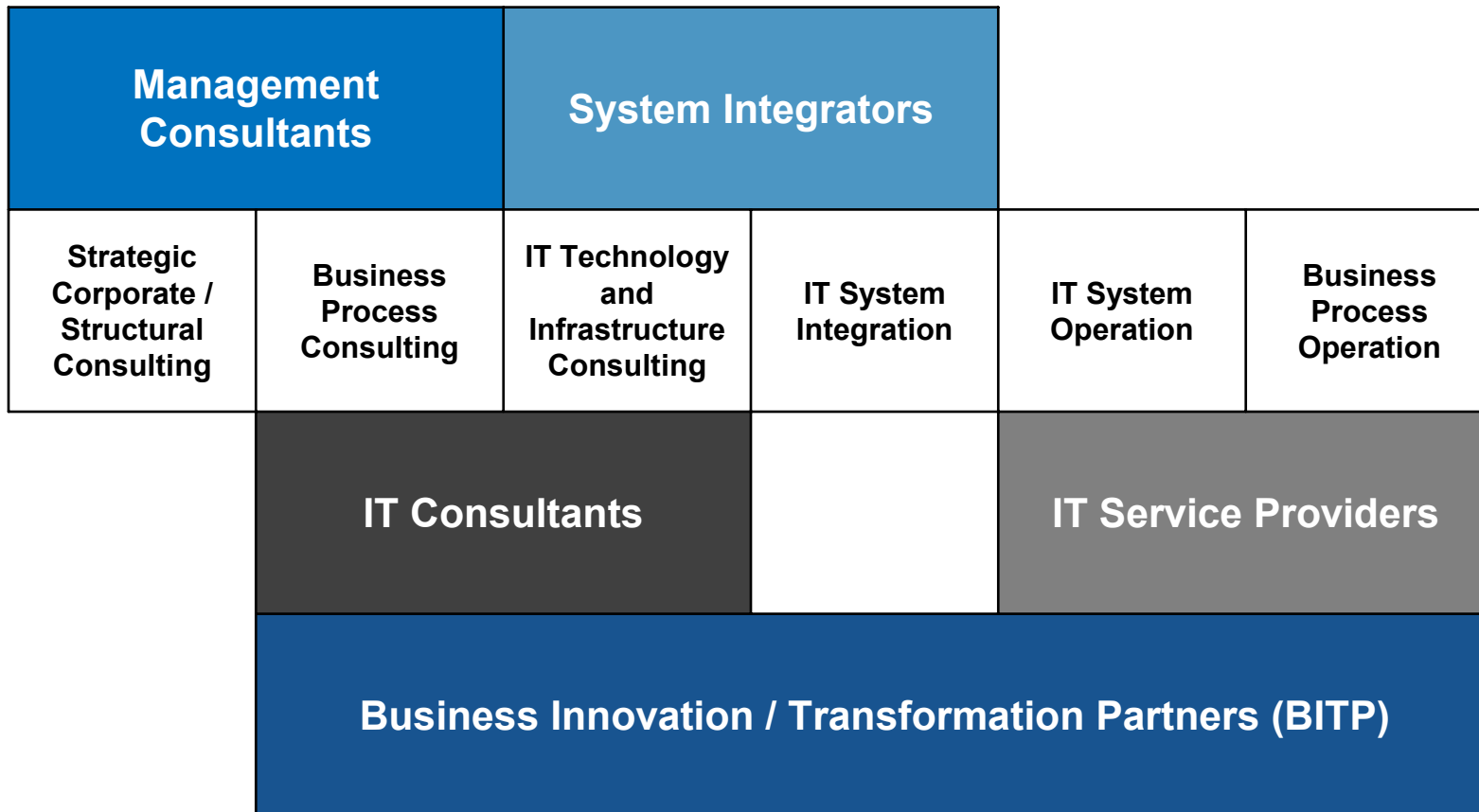
- Companies operating internationally want to make use of their IT provider's services at all their locations. Global Delivery and Sourcing Models that provide added value for customers are a must.

Consolidation in the IT Consulting and Services Market



- Customer demands are leading to increasingly global competition in the world of IT consulting and IT service provision.
- This in turn leads to increasing market consolidation. Drivers of this consolidation are the so called “Value Growers”, which are companies that have already achieved a critical size, and which provide extensive geographical coverage and a comprehensive service portfolio. They also offer strategy and management consulting alongside IT consulting, system integration, and IT and business-process outsourcing.

Change in the Provider Structure



Source: Lünendonk

- More than 60% of sales achieved by consulting and services.
- Of these revenues, at least 10% in each case is accounted for by the three categories:
 - Management or IT consulting
 - System realisation or integration
 - Operation of IT systems (outsourcing) on behalf of the customer

Customers' Selection Criteria for a BITP



- Industry skills and competence
- Commercial stability
- Management skills
- Innovation
- Technical competence

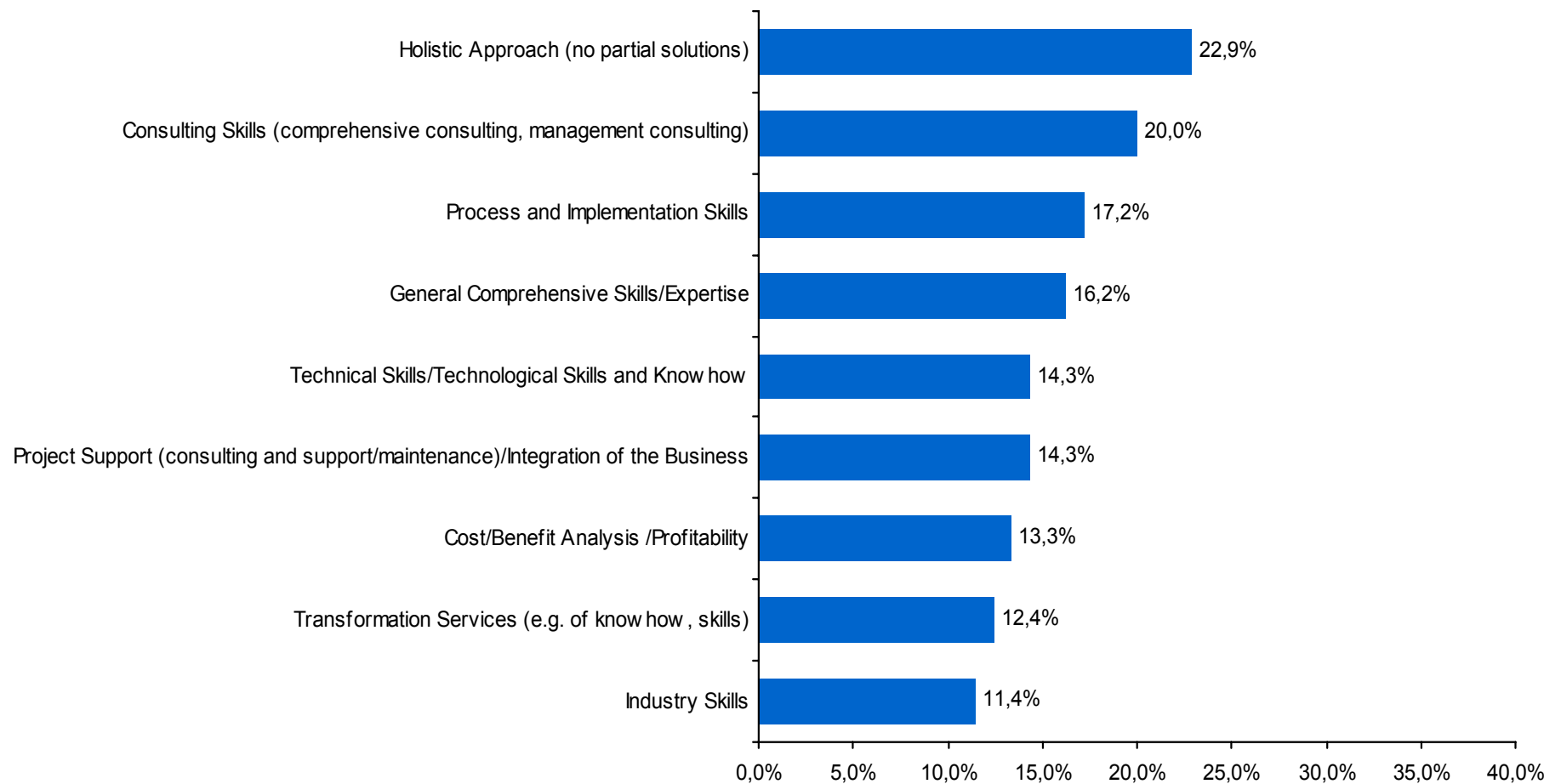
Customer Expectations for BITP Providers



Expected skills from Complete BITP Service Providers

Values stated in %

(listed in accordance with number of times mentioned - multiple answers possible)



Source: Lünendonk

Many Thanks!



**we
improve
IT**

www.snt-world.com

Eugen Schwab Chesaru

Partner & Managing Director PAC

Central & Eastern Europe

IT Services Market – New Competitive Landscape

Vienna, 09 September 2008

www.snt-world.com

**we
improve
IT**

Artur Borowski

Channel Manager Central & Eastern Europe EMC²

Changing the landscape of the digital universe

Vienna, 09 September 2008

www.snt-world.com

**we
improve
IT**