



2024/2025 IT Sourcing Study Europe

Whitelane Research

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21 JANUARY 2025
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Whitelane Research

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All results are embargoed until **Monday, 3 February 2024**.

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The background of the slide features a dark blue vertical bar on the left side. The rest of the slide has a white background with a faint, abstract pattern of colorful lines (green, yellow, red, blue) that appear to be part of a network or data visualization. The word "Agenda" is written in white, bold, sans-serif font on the blue bar.

Agenda

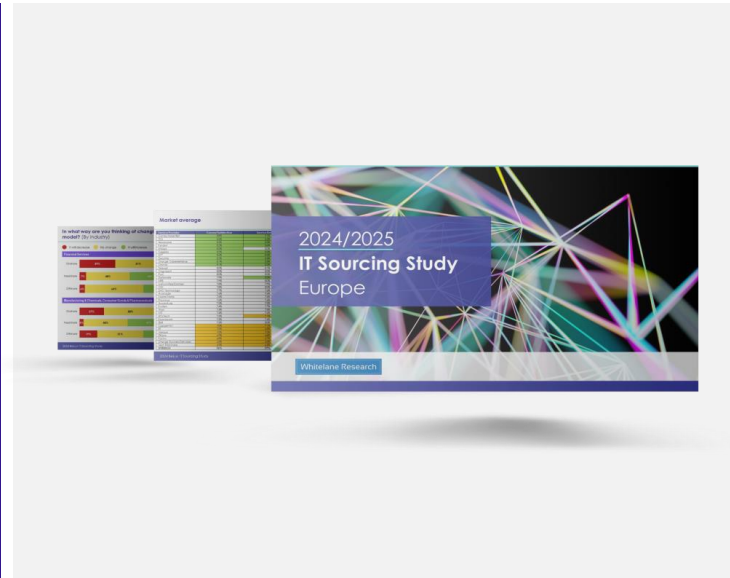
1. Introduction and research methodology
2. IT sourcing and governance trends
3. IT service provider & cloud platform provider performance



01

Introduction & research methodology

Close to **2,300 participants** of the **top IT spending organisations in Europe** have evaluated over **6,000 unique IT sourcing relationships** and more than **6,500 cloud platform sourcing relationships**.



Service providers must have at least **25 client evaluations** for general satisfaction to be ranked in this research report.

To be ranked in the application, digital transformation, cloud & infrastructure, workplace services, network and connectivity, security services, and cloud platform rankings, service providers must have at least **20 client evaluations**.

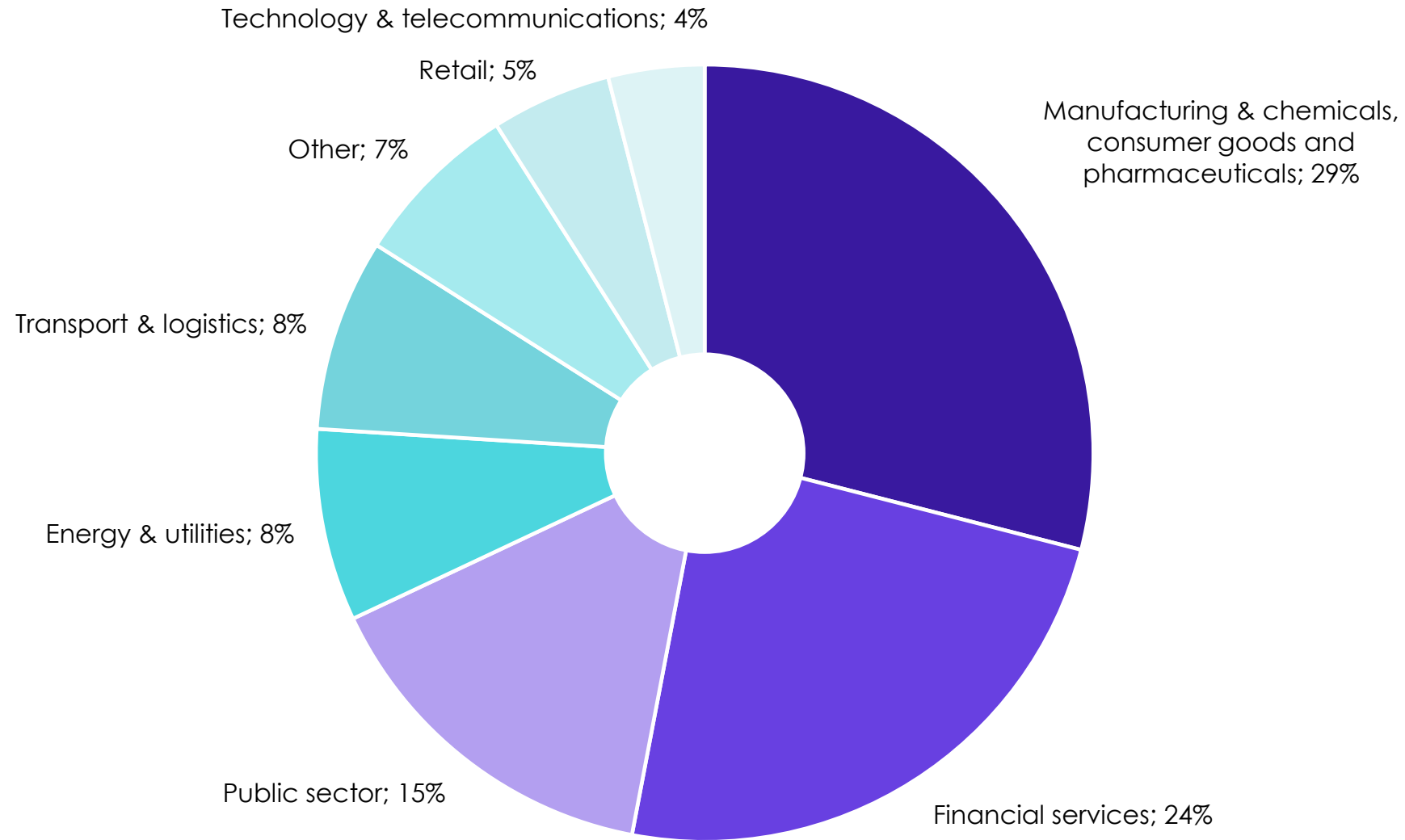
34 IT service providers and **12 cloud platform providers** have been evaluated and ranked based on the opinion of their clients (not on the opinion of Whitelane Research).



The research findings are solely based on the data received in the market study from the respondents surveyed.

The IT sourcing services under evaluation are consumed by the 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 organization.



N=2,293

Whitelane Research

Providing unparalleled insights into IT service provider performance in Europe

Whitelane Research, a trusted independent research organization, has been leading the way in IT sourcing research across Europe for over a decade.

Our renowned studies feature 2,000+ client organizations evaluating 5,000+ IT sourcing relationships yearly.

With 500+ annual in-depth interviews with IT executives, Whitelane is the definitive authority in identifying the top-performing service providers in Europe.



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 sourcing 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 sourcing journey, insights from the service provider community, and exclusive networking opportunities with like-minded corporate executives.

CORPORATE MEMBERSHIPS

Our corporate membership offers exclusive benefits, including tailored private sessions, client reference calls, connections with provider executives, access to detailed country reports and industry-specific intelligence, and participation in all Whitelane events.

02

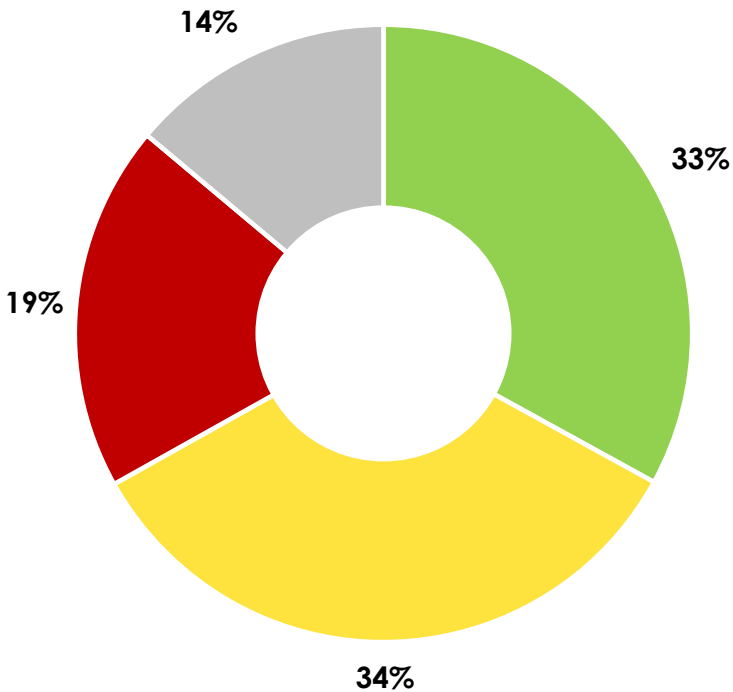
IT sourcing trends



What are your organisation's plans for the next two years with regard to IT sourcing?

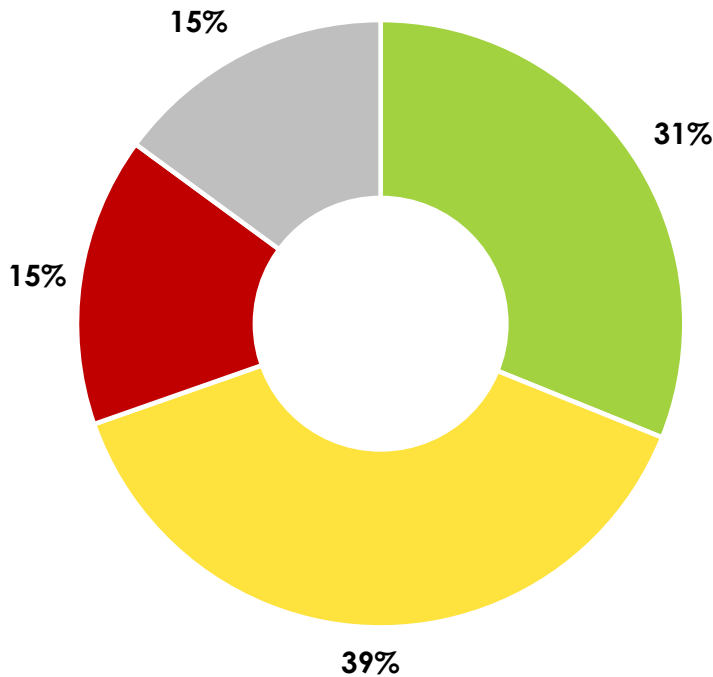
- We will spend more of our IT budget on external providers
- We will spend less of our IT budget on external providers
- There will be no change
- We don't know yet

2024/2025



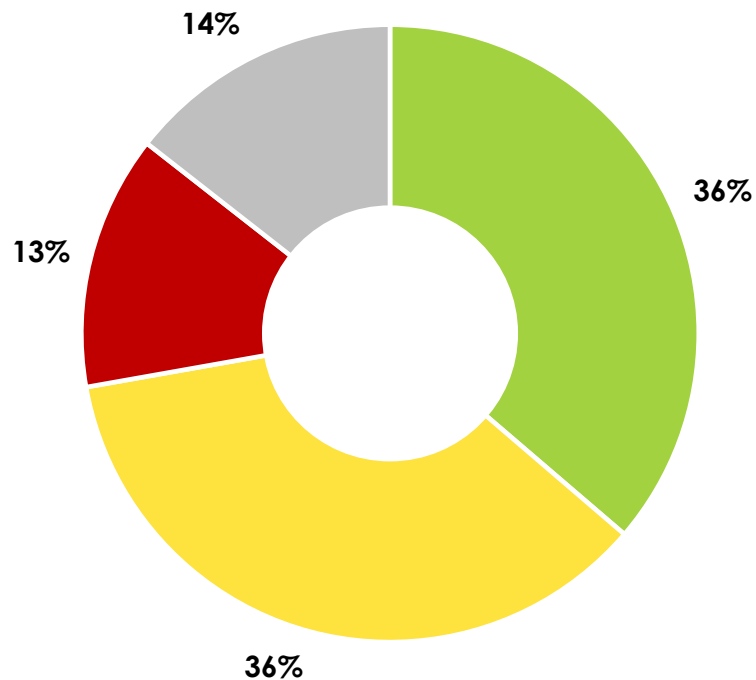
N=2,293

2023/2024



N=2,104

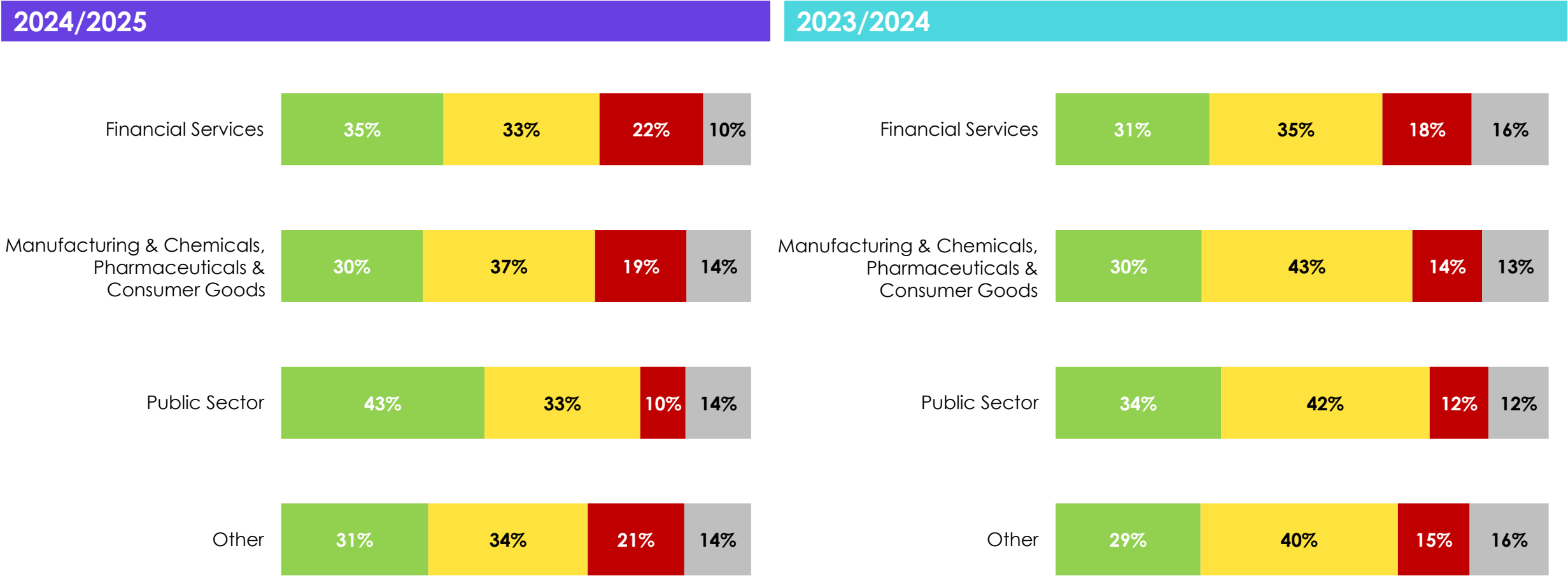
2022/2023



N=1,867

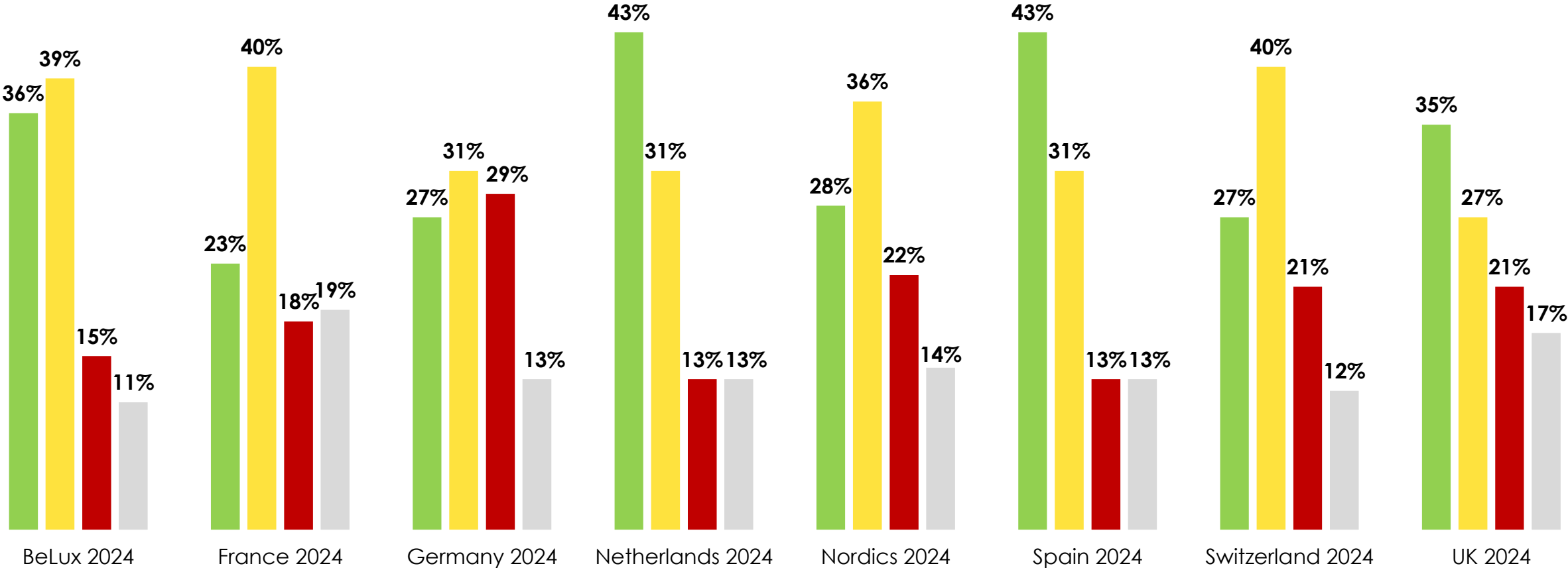
What are your organisation's plans for the next two years with regard to IT sourcing? (By industry)

- We will spend more of our IT budget on external providers
- We will spend less of our IT budget on external providers
- There will be no change
- We don't know yet



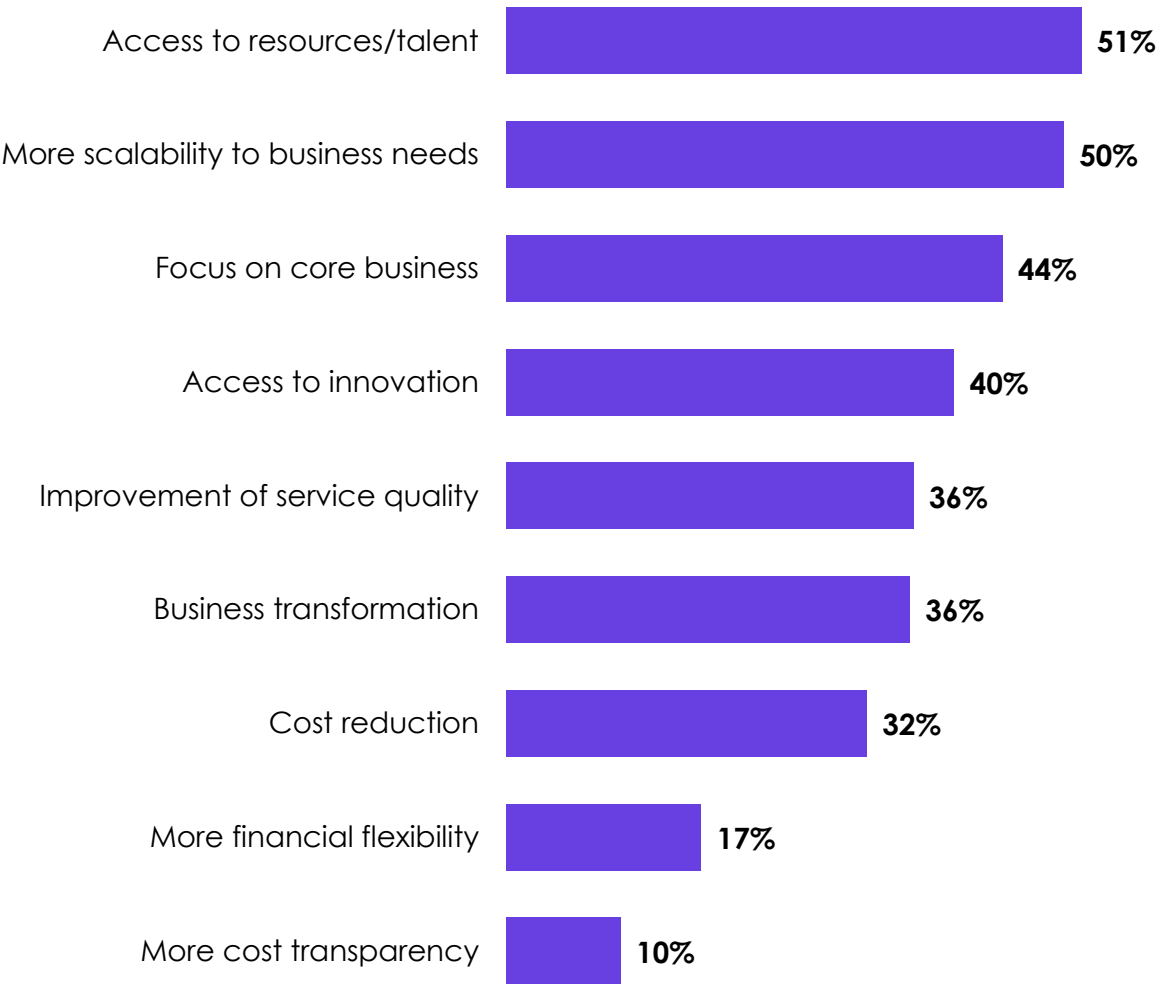
What are your organisation's plans for the next two years with regard to IT sourcing? (By country/region)

- We will spend more of our IT budget on external providers
- We will spend less of our IT budget on external providers
- There will be no change
- We don't know yet

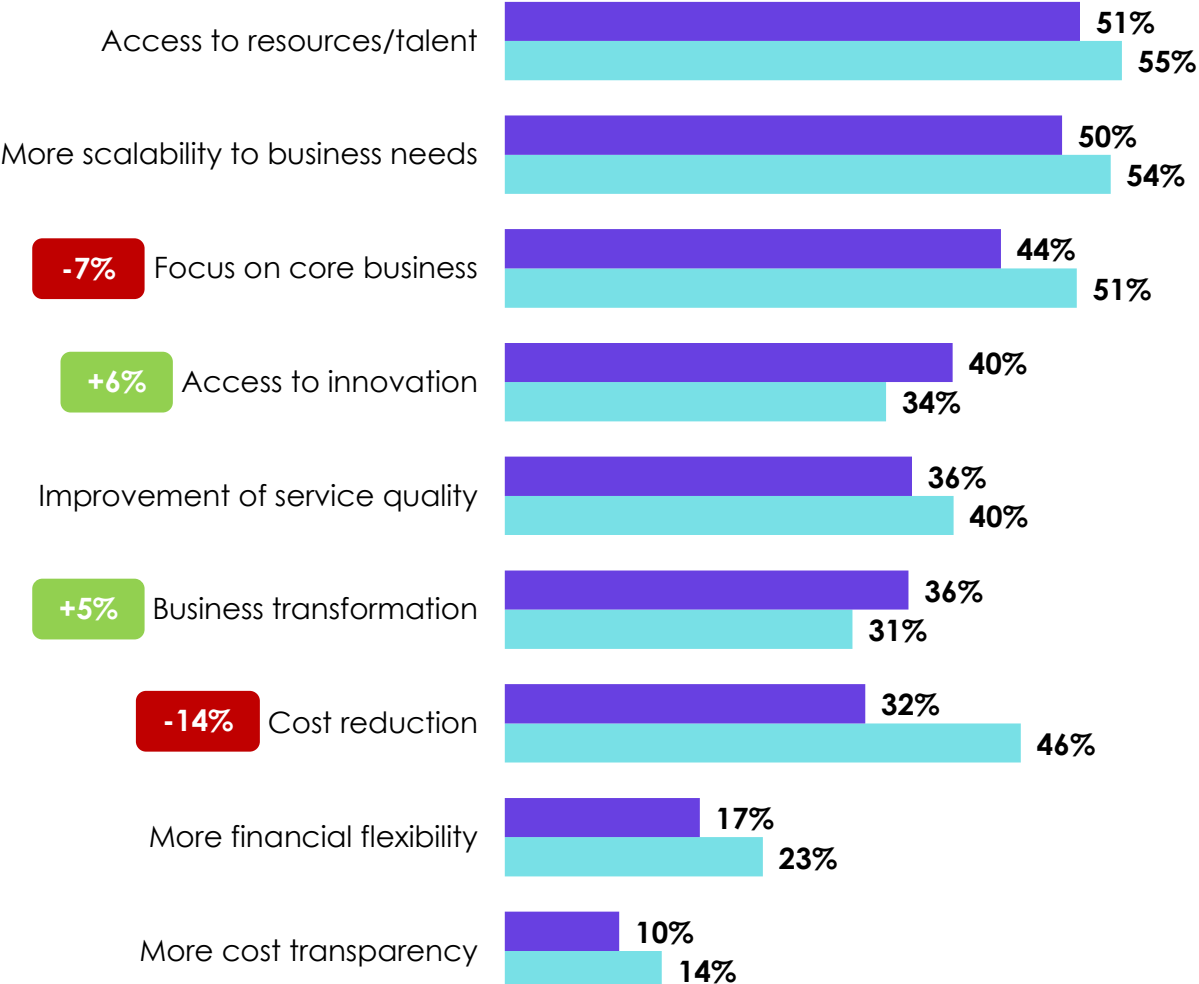


What are the reasons your organisation is planning to increase the use of external IT providers?

2024/2025



Comparison with 2023/2024



What are the reasons your organization is planning to increase the use of external IT providers? (By industry)

Industry	Access to resources & talent	More scalability	Focus on core business	Access to innovation	Service quality improvement	Business transformation	Cost reduction	More financial flexibility	More cost transparency
Financial Services	51%	48%	42%	39%	31%	36%	34%	19%	8%
Manufacturing & Chemicals, Pharmaceuticals & Consumer Goods	52%	54%	49%	42%	33%	36%	36%	19%	11%
Public Sector	55%	49%	44%	45%	40%	42%	15%	11%	11%
Other*	51%	49%	44%	36%	41%	34%	33%	16%	8%

*Other includes Energy/Utilities, Retail, Transport & Logistics, Telecommunications & Technology and other industries

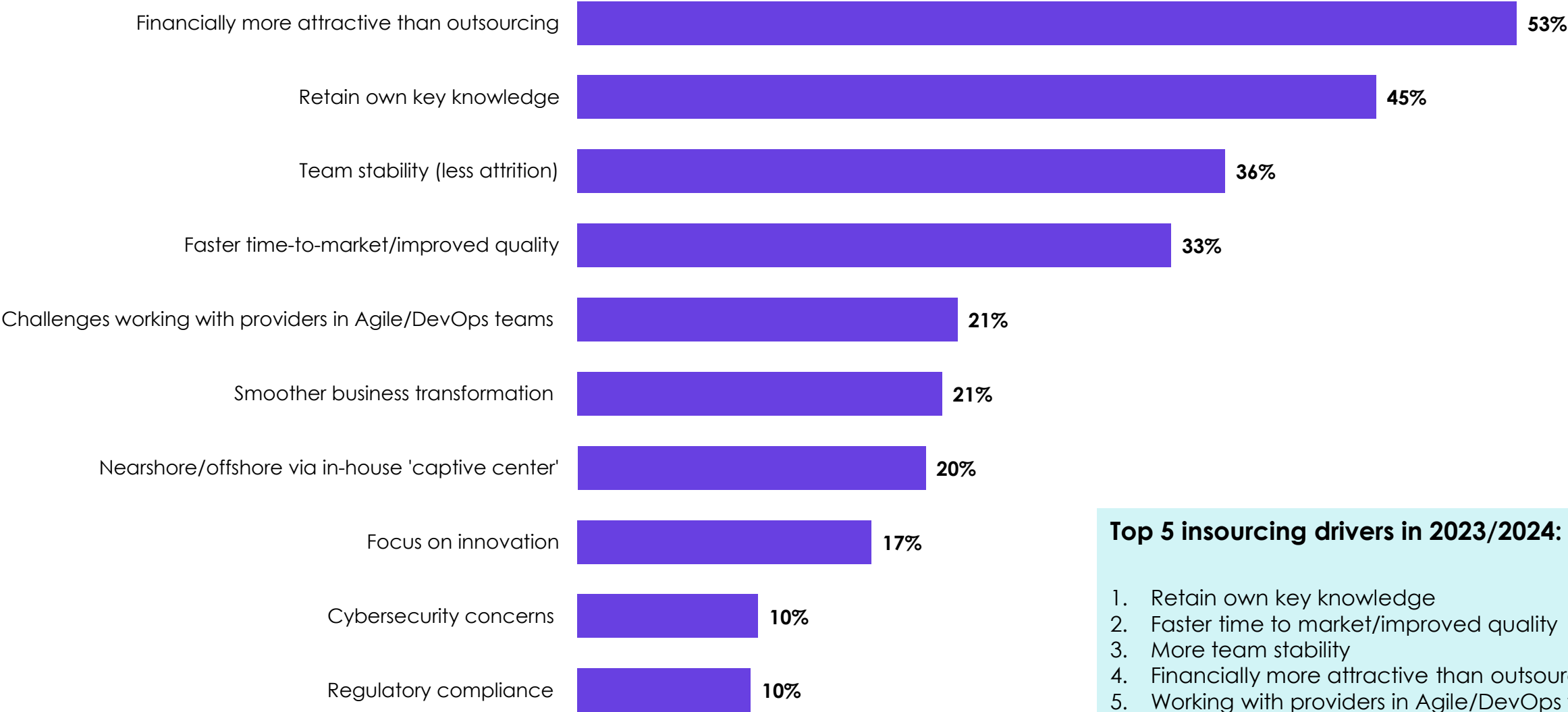
What are the reasons your organization is planning to increase the use of external IT providers? (By country/region)

Country/region	Access to resources & talent	More scalability	Focus on core business	Access to innovation	Service quality improvement	Business transformation	Cost reduction	More financial flexibility	More cost transparency
BeLux	61%	46%	50%	35%	36%	32%	28%	15%	12%
France	28%	46%	53%	38%	40%	18%	48%	20%	13%
Germany	41%	38%	56%	42%	28%	28%	41%	20%	14%
Netherlands	56%	51%	49%	44%	42%	45%	23%	12%	10%

What are the reasons your organization is planning to increase the use of external IT providers? (By country/region)

Country/region	Access to resources & talent	More scalability	Focus on core business	Access to innovation	Service quality improvement	Business transformation	Cost reduction	More financial flexibility	More cost transparency
Nordics	50%	54%	37%	33%	30%	33%	32%	15%	8%
Spain	53%	60%	35%	46%	39%	34%	18%	15%	5%
Switzerland	58%	30%	53%	43%	45%	28%	58%	28%	13%
United Kingdom	57%	54%	38%	40%	36%	52%	38%	23%	12%

What are the reasons your organisation is planning to decrease the use of external IT providers and do more IT in-house?



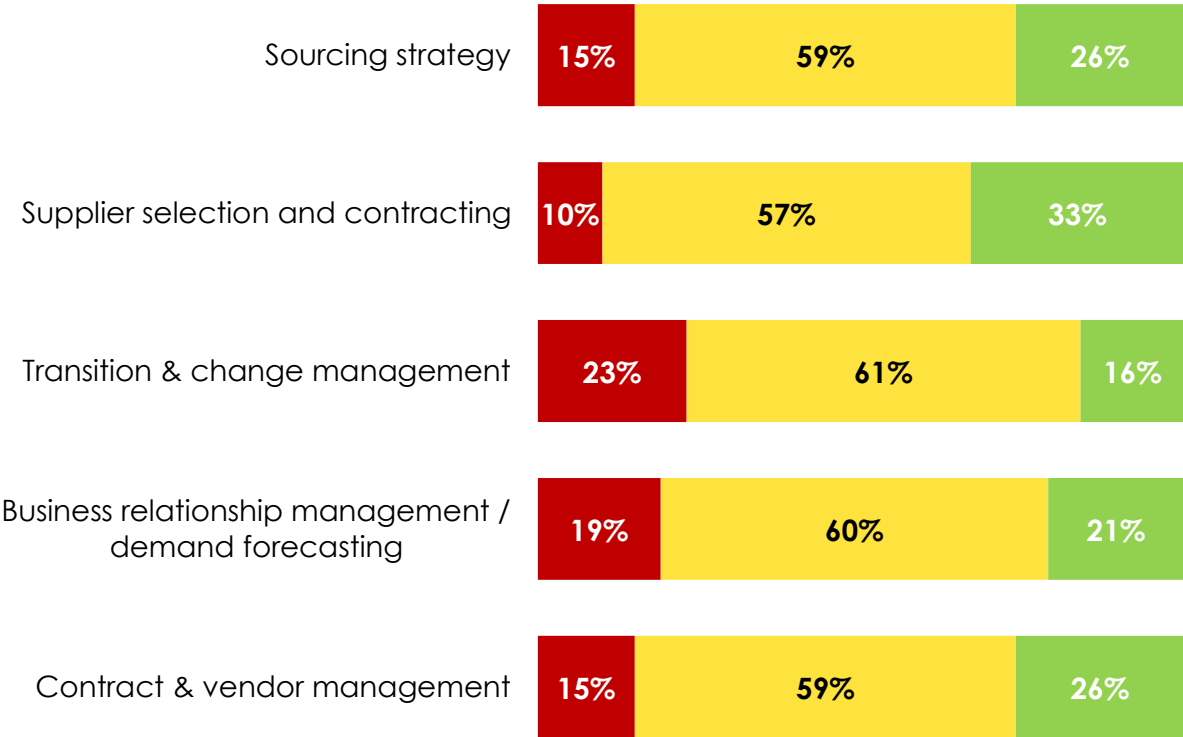
Top 5 insourcing drivers in 2023/2024:

- 1. Retain own key knowledge
- 2. Faster time to market/improved quality
- 3. More team stability
- 4. Financially more attractive than outsourcing
- 5. Working with providers in Agile/DevOps teams

Very significant improvement required Moderate improvement required No improvement required

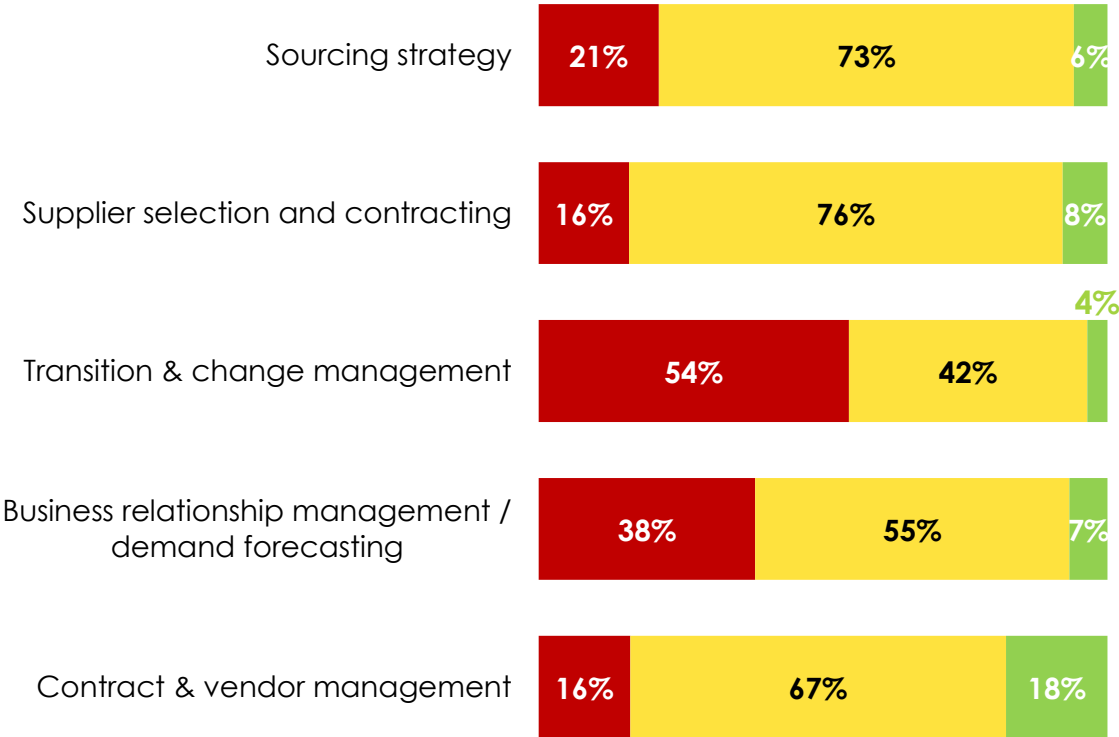
Client perspective

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

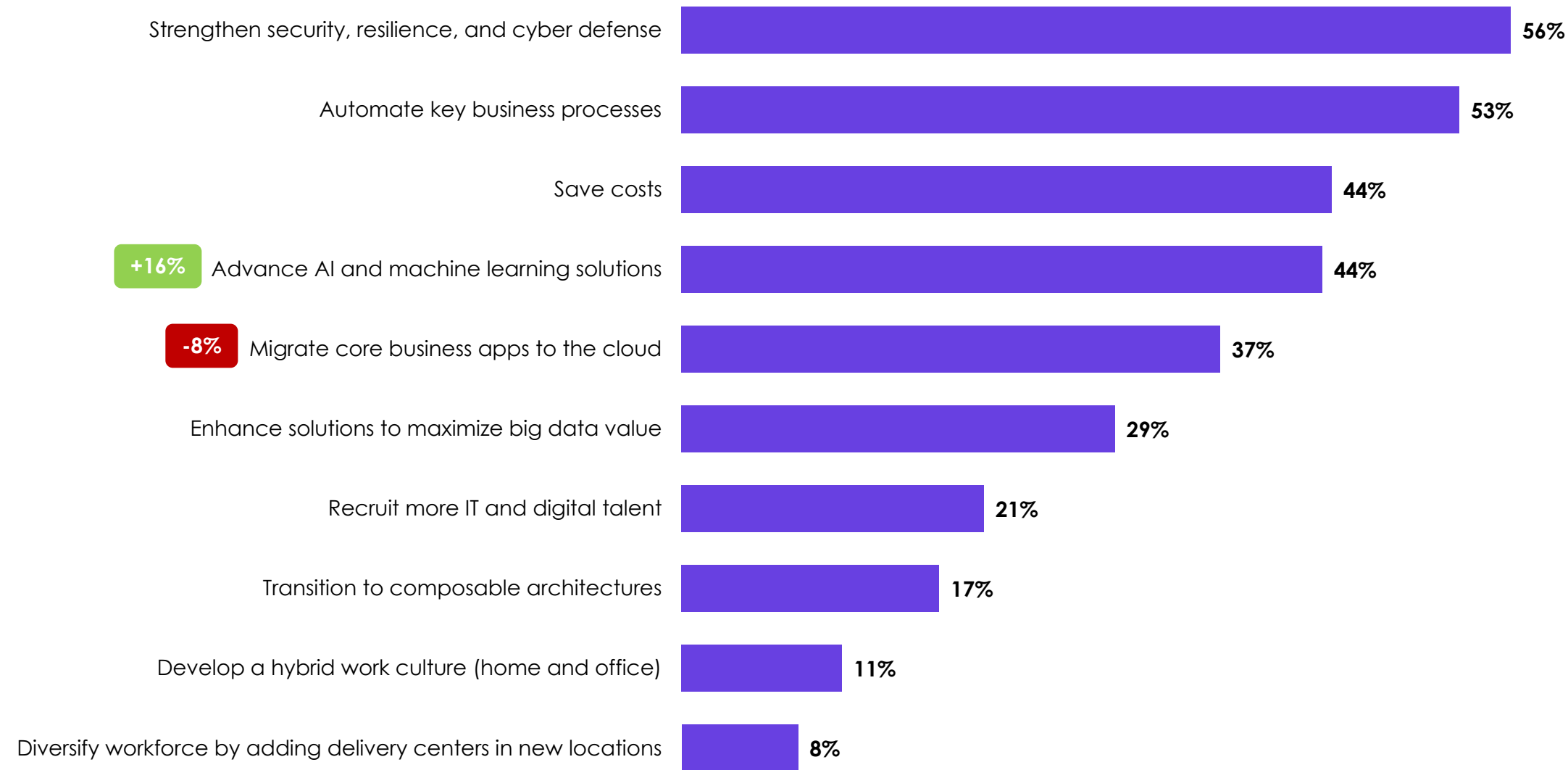


Service provider perspective

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

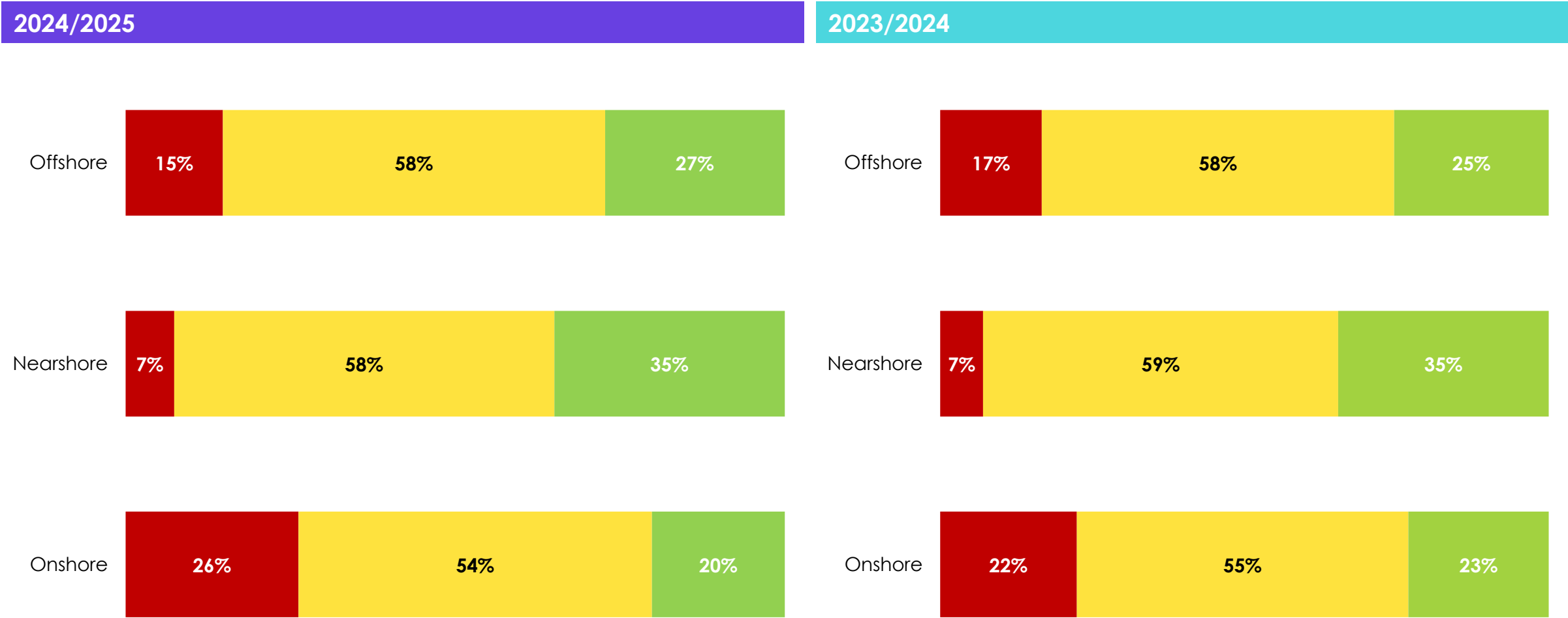


What are your top three IT investment areas in the coming two years?

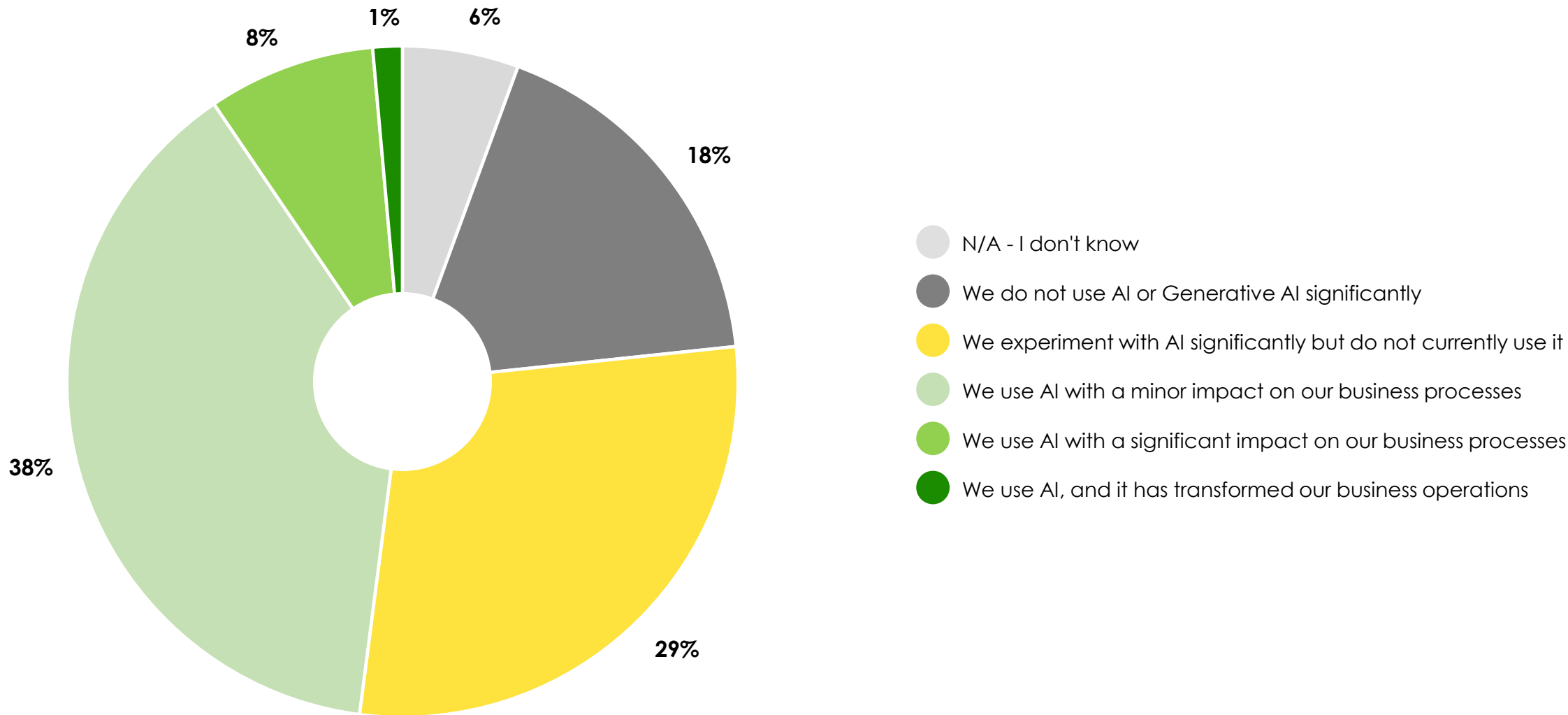


In what way are you thinking of changing the mix of your outsourcing delivery model?

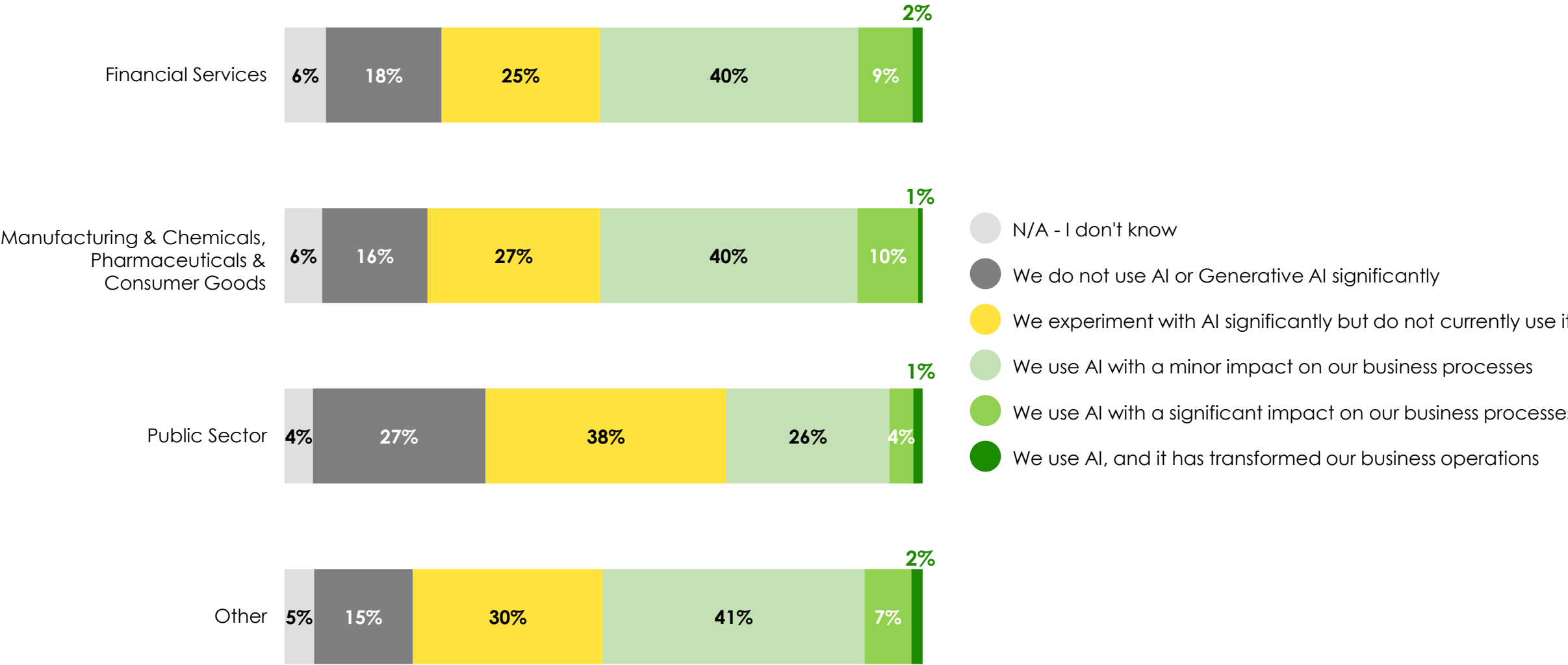
● It will decrease ● No change ● It will increase



To what extent does your organisation use AI or Generative AI?



To what extent does your organisation use AI or Generative AI? (By industry)



03

IT service provider performance



Service provider coverage in Europe

Service Provider	Number of Evaluations	Service Provider	Number of Evaluations
Accenture	320	T-Systems	106
Capgemini	290	Orange Business	104
TCS	288	PwC	80
Atos/Eviden	281	EPAM	79
DXC Technology	217	Computacenter	70
NTT DATA	206	BT	68
IBM	184	EY	68
CGI	182	Orange Cyberdefense	68
Deloitte	172	Tech Mahindra	63
HCLTech	152	LTIMindtree	62
Infosys	146	Econocom	59
Kyndryl	138	Verizon	53
Sopra Steria	134	Hexaware	45
Cognizant	131	Stefanini	34
Wipro	127	GTT	31
Inetum	126	AT&T	25
Fujitsu	120	Persistent	25



Application Services: Day-to-day development and maintenance of applications, for instance, using DevOps, Scrum or Waterfall.



Digital Transformation: Major new application/platform roll-outs, cloud transformations, large application portfolio transformations.



Cloud & Infrastructure Services: Day-to-day maintenance, integration and support of data center, managed infrastructure and IaaS/PaaS services.



Workplace Services: Day-to-day maintenance and support of digital workplace, including on-site support and the service desk/helpdesk.



Network & Connectivity Services: Services to connect people and assets across locations (including managed WAN, SD-WAN, SASE, and private 5G/IoT).



Security Services: Security Services that are delivered separately from the other services (e.g. SOC, SIEM, SOAR services).

Satisfaction scores

- Respondents are asked to evaluate their overall satisfaction with each IT sourcing relationship and its corresponding service provider. The question posed is: "On a scale from very unsatisfied to very satisfied, *how satisfied are you in general with these service providers?*"
- The scores are calculated as percentages using the table below:

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

Exceptional Performers

- Service providers who rank above the typical spread of the market are categorised as “**exceptional performers**”. This means their satisfaction scores stand out compared to the other ranked service providers.
- In statistical terms, exceptional performers score higher than the market average, increased by the standard deviation.

Strong Performers

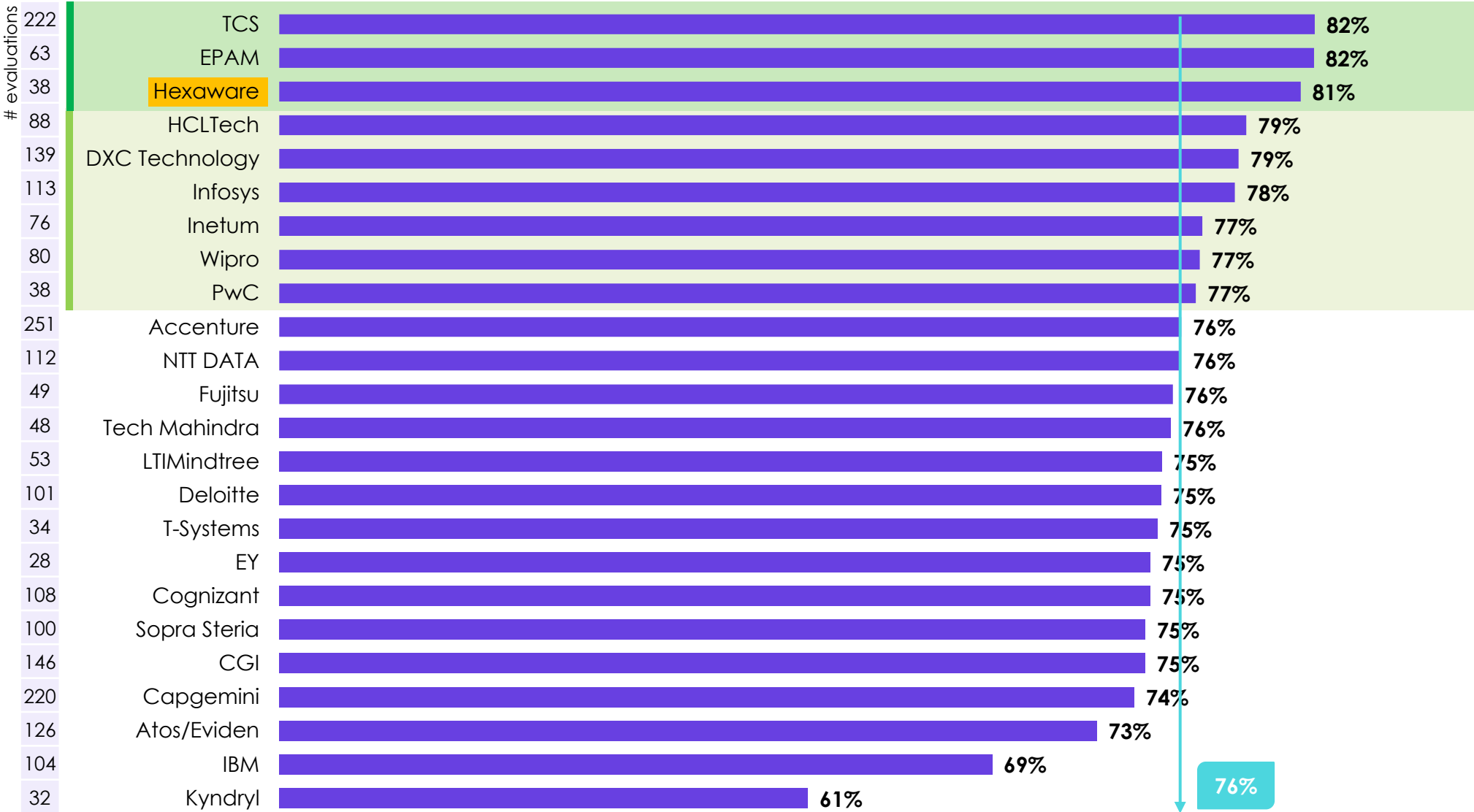
- Service providers who do not achieve exceptional status but still have a satisfaction score higher than the market average are categorised as “**strong performers**”.

03

IT service provider performance

Satisfaction by IT service tower

Application Services

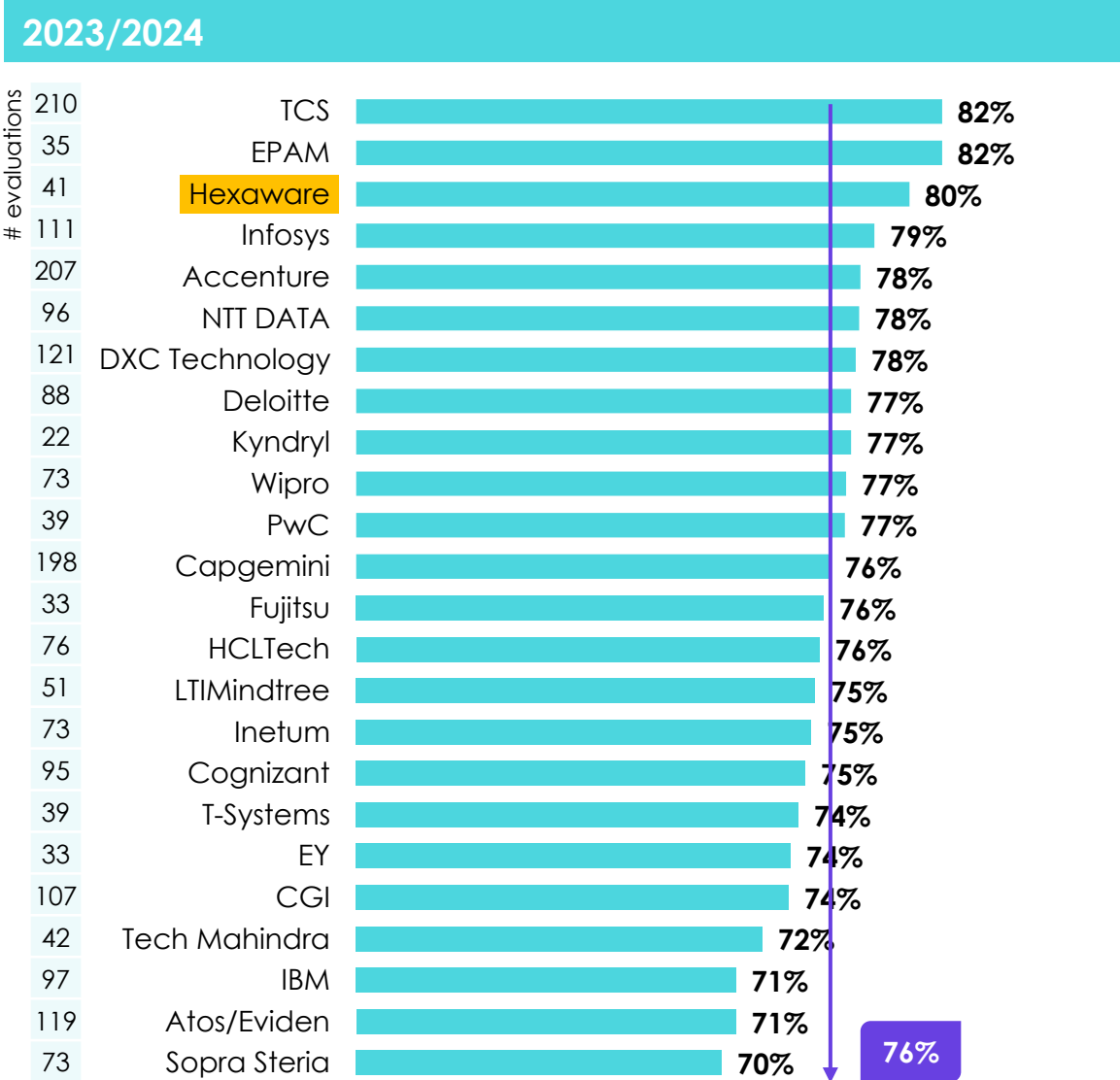
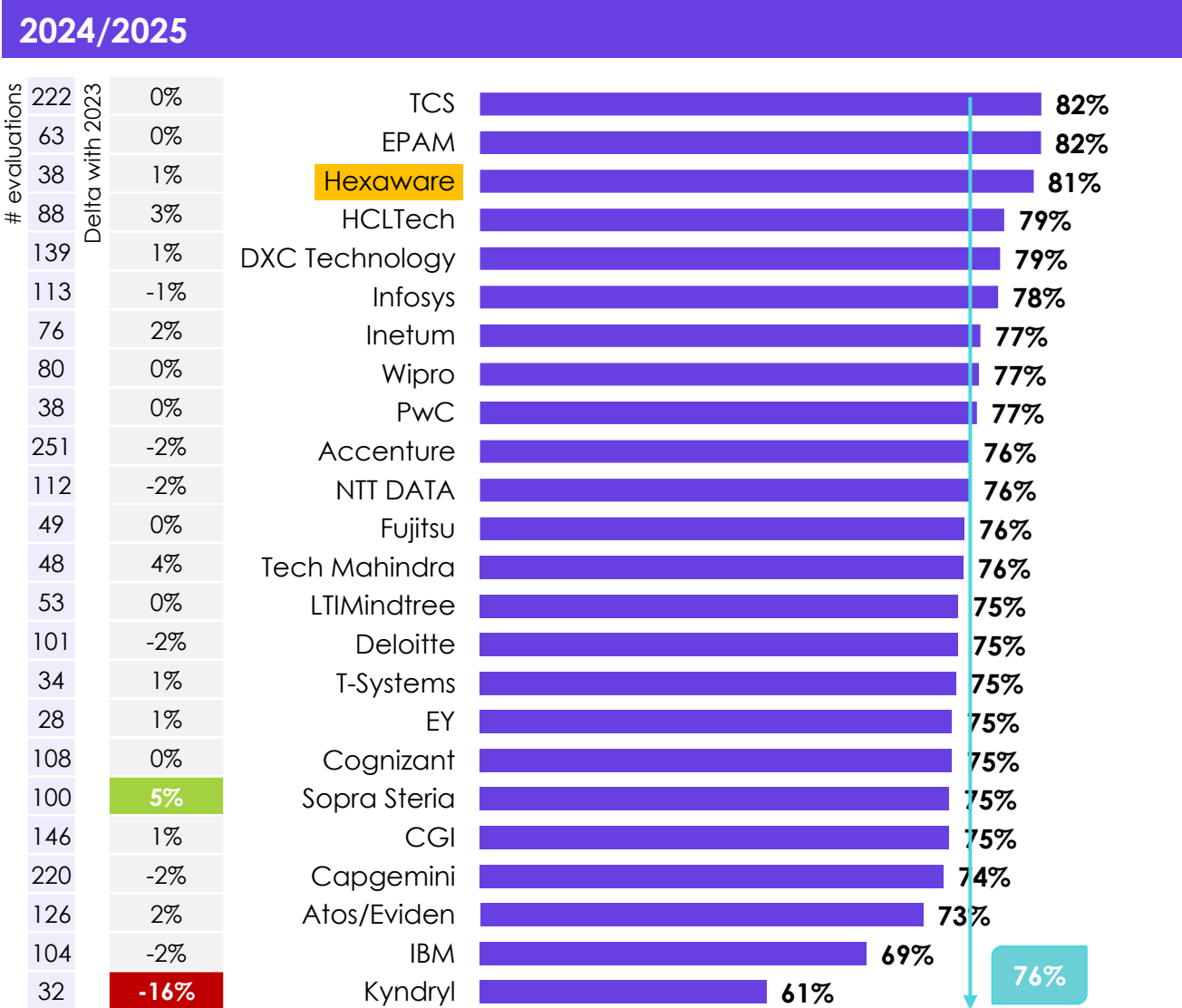


Exceptional performers

Strong performers

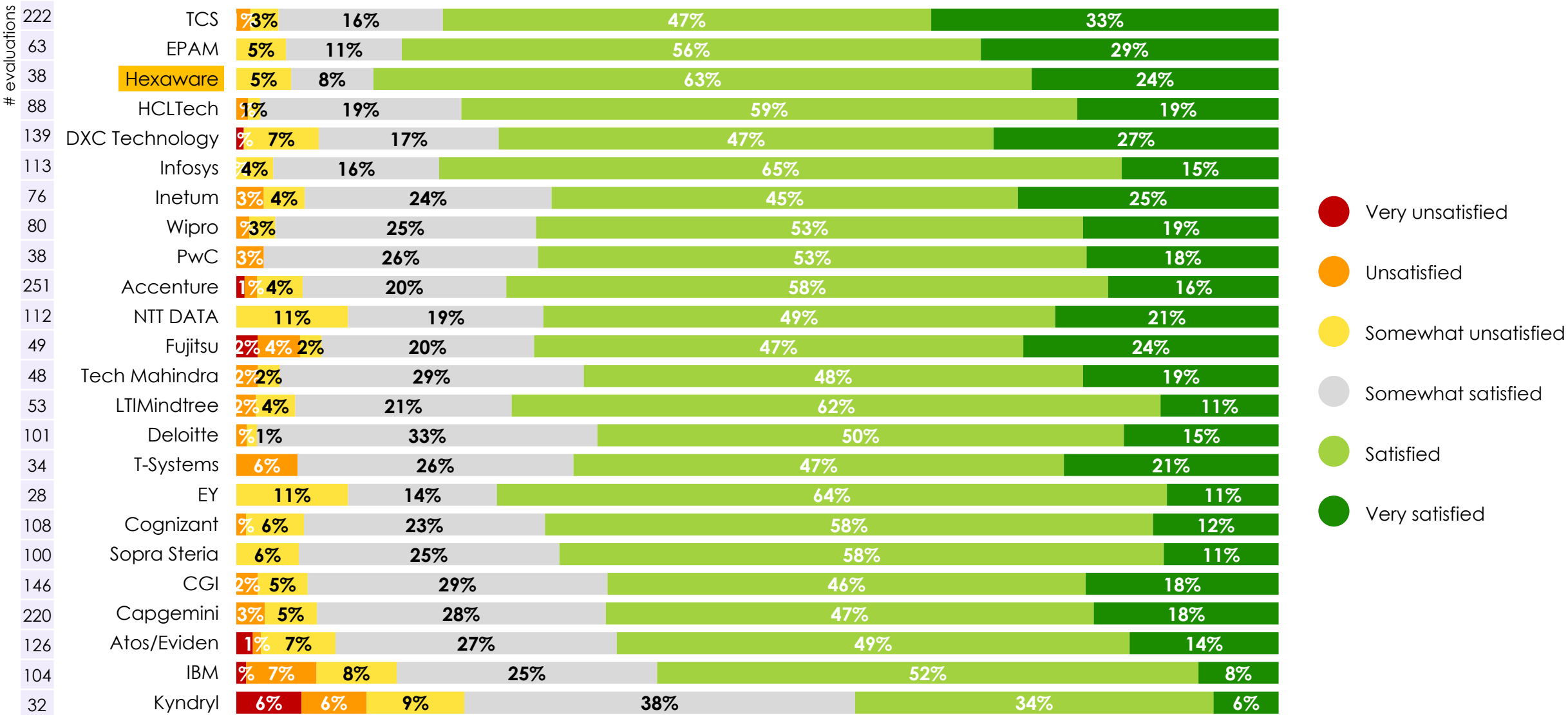
KEY TO SCORES	
Very unsatisfied	0%
Unsatisfied	20%
Somewhat unsatisfied	40%
Somewhat satisfied	60%
Satisfied	80%
Very satisfied	100%

Application services (Comparison with 2023/2024)

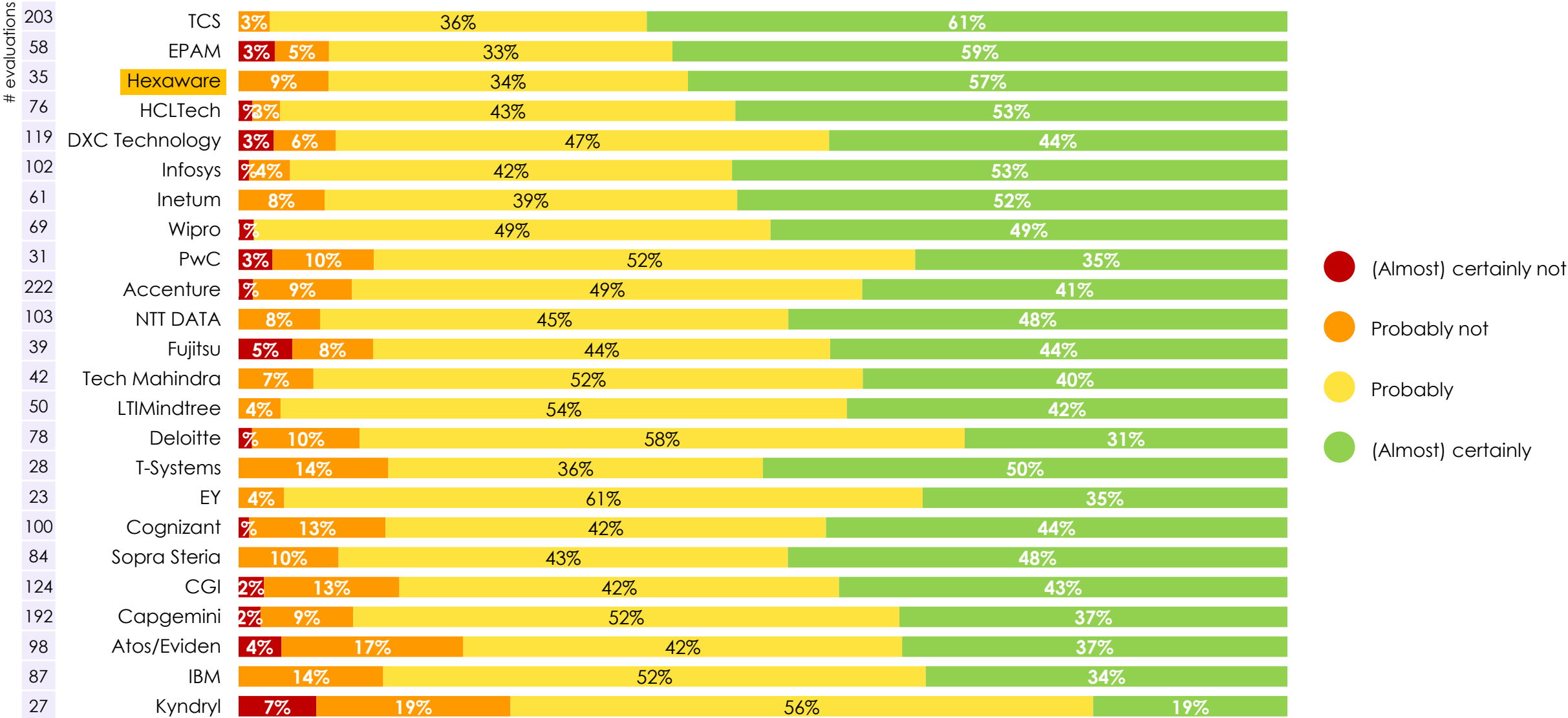


Industry Sector	Hexaware Score	Average Score
Financial Services	81%	77%
Manufacturing & Chemicals, Consumer Goods & Pharmaceuticals	N/A	75%
Country/region	Hexaware Score	Average Score
BeLux	83%	77%
Netherlands	N/A	77%
Nordics	N/A	76%
United Kingdom	83%	74%
Switzerland	N/A	77%
Spain	N/A	80%
Germany	N/A	74%
France	N/A	75%

Application services (Detailed satisfaction)



Application services(Likelihood of contract renewal)

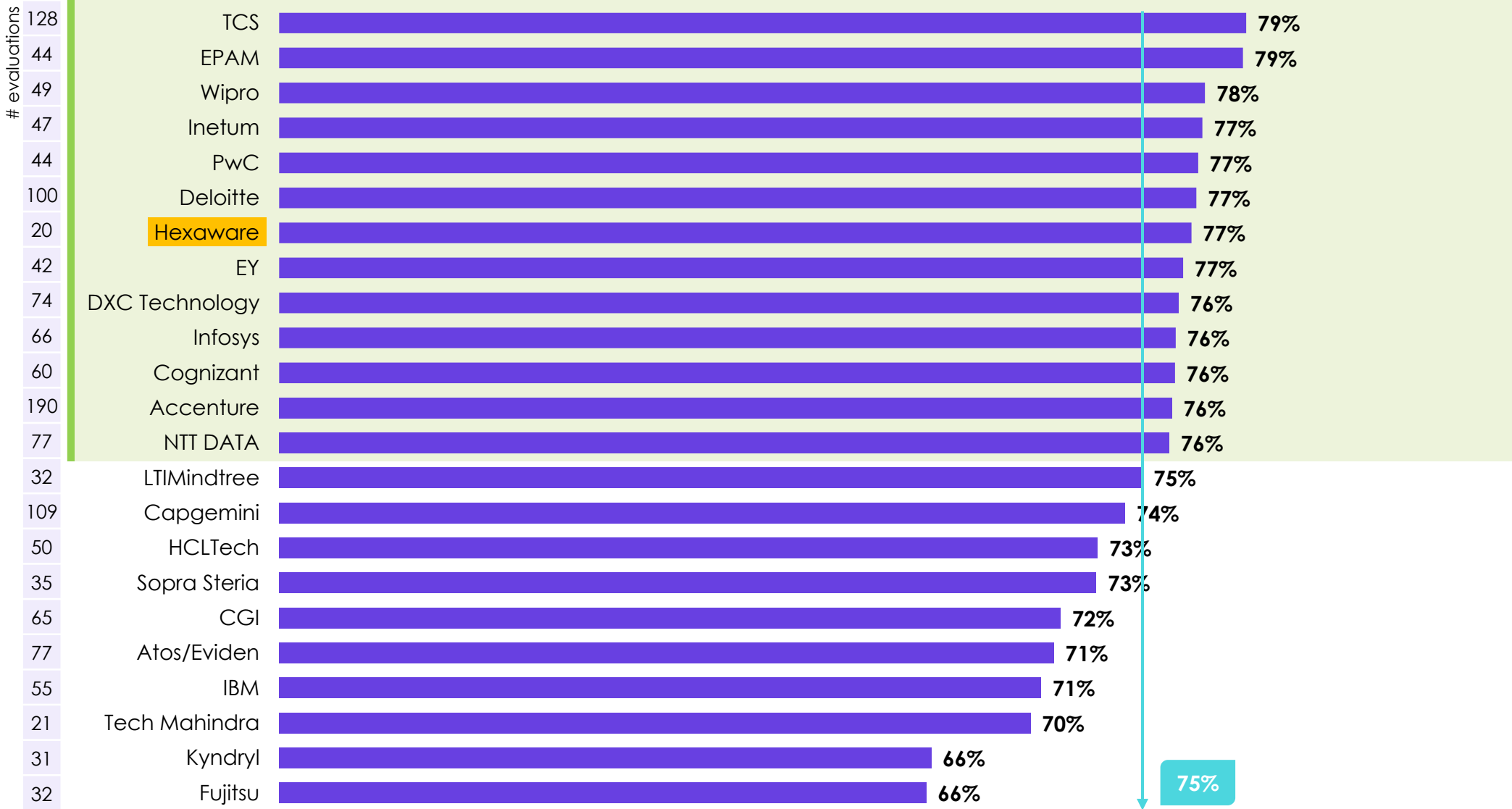


03

IT service provider performance

Satisfaction by IT service tower

Digital Transformation



Exceptional performers

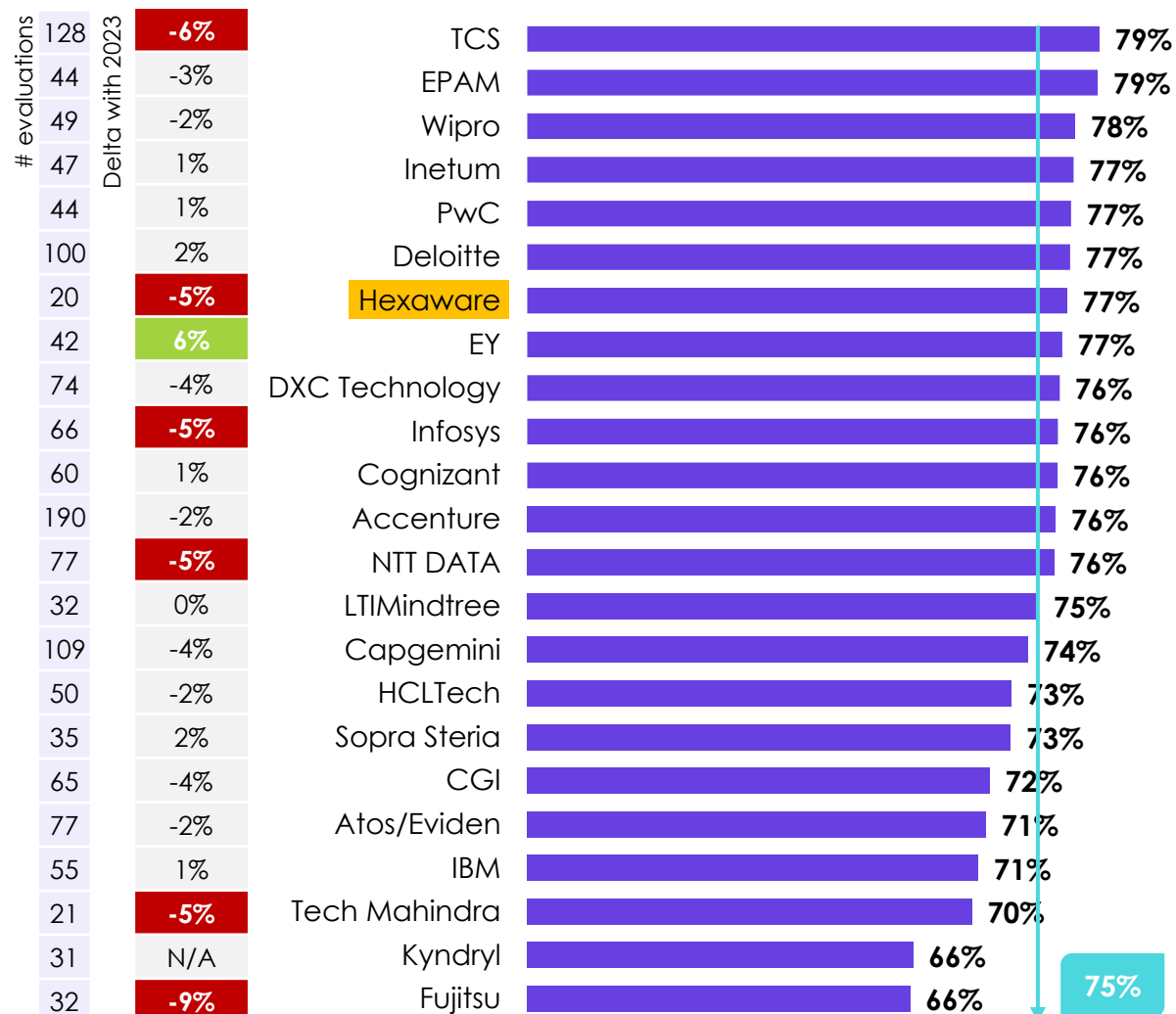
Strong performers

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

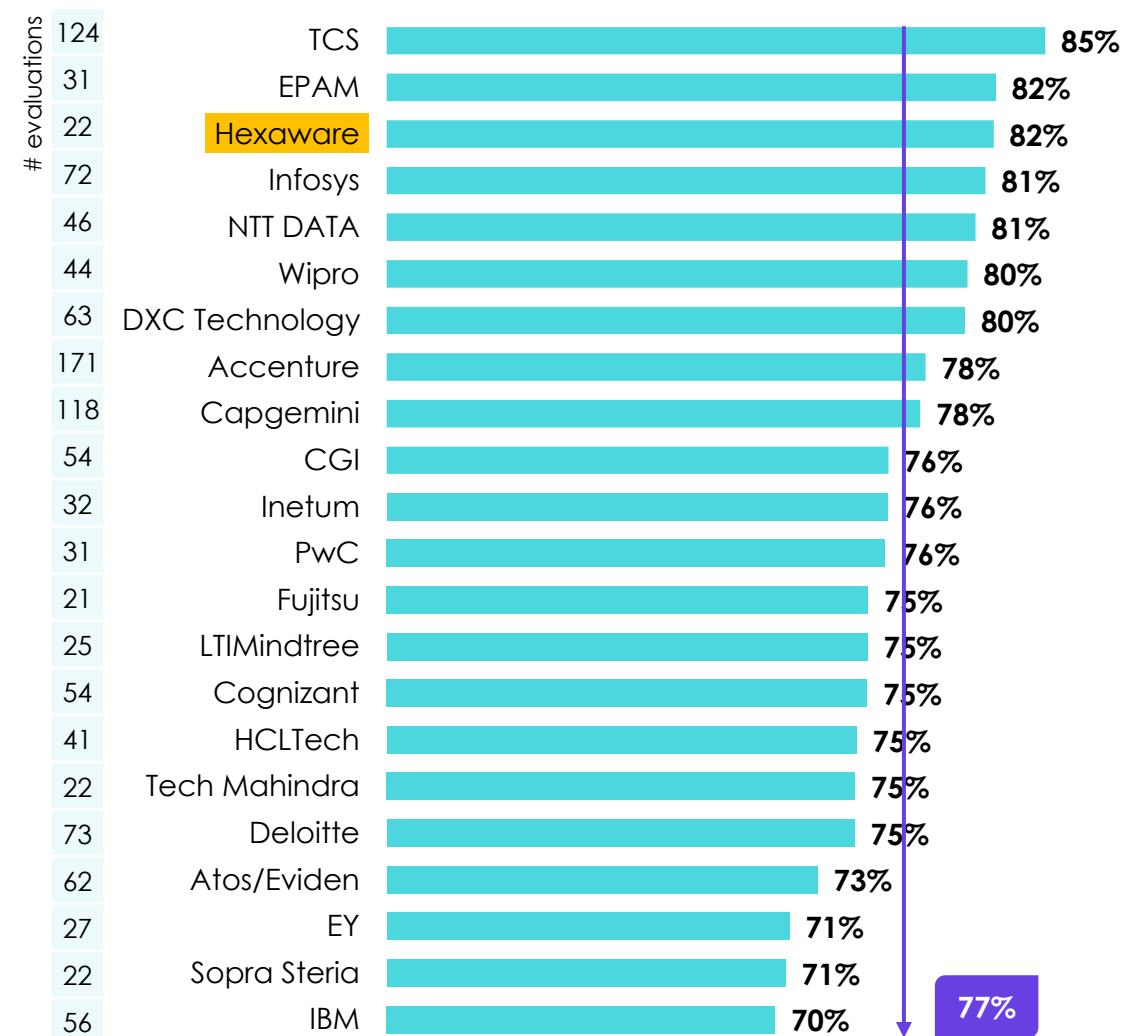
Digital transformation (Comparison with 2023/2024)

03
Satisfaction by
IT service tower

2024/2025

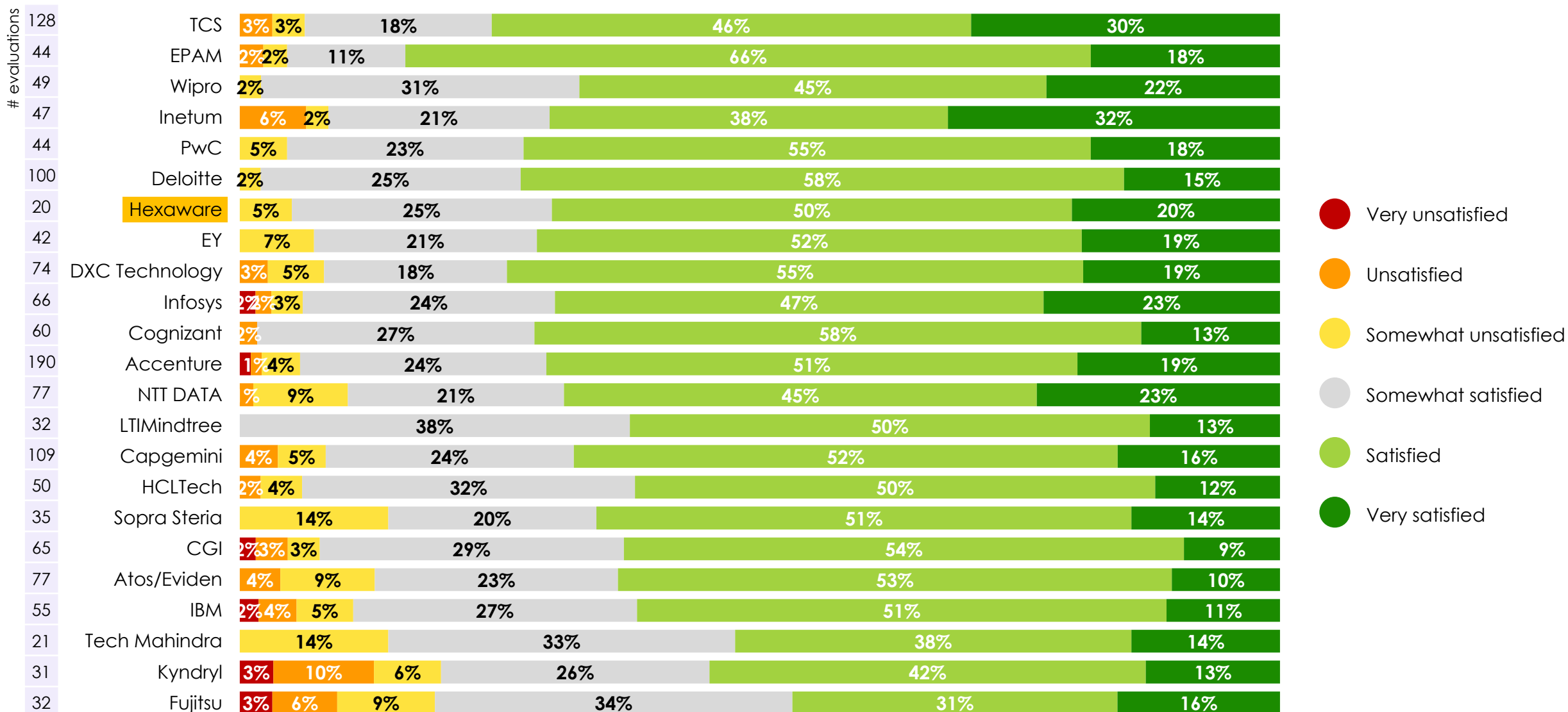


2023/2024



Industry Sector	Hexaware Score	Average Score
Financial Services	78%	76%
Manufacturing & Chemicals, Consumer Goods & Pharmaceuticals	N/A	74%
Hexaware Score	Hexaware Score	Average Score
BeLux	N/A	77%
Netherlands	N/A	74%
Nordics	N/A	73%
United Kingdom	80%	75%
Switzerland	N/A	75%
Spain	N/A	80%
Germany	N/A	72%
France	N/A	72%

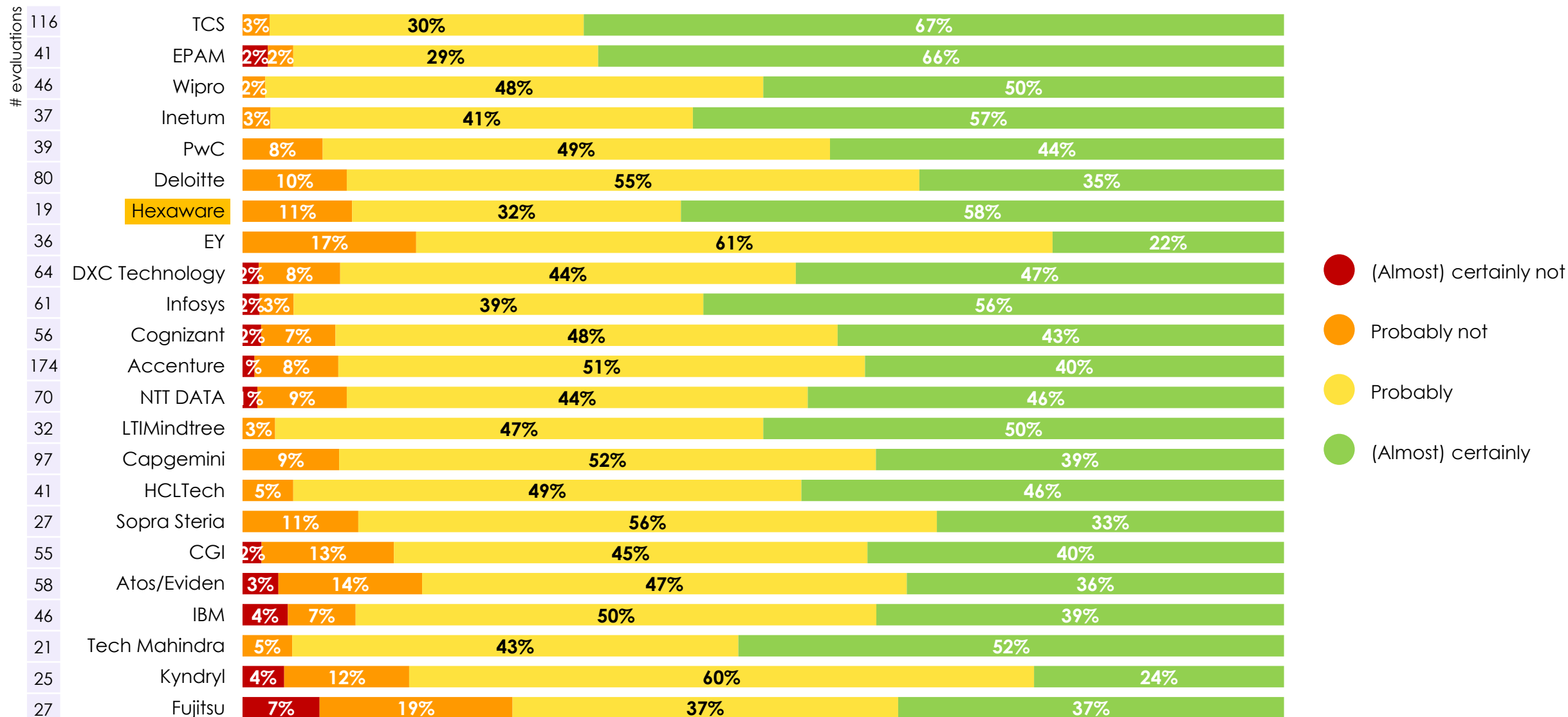
Digital transformation (Detailed satisfaction)



Digital transformation (Likelihood of contract renewal)

03

Satisfaction by
IT service tower





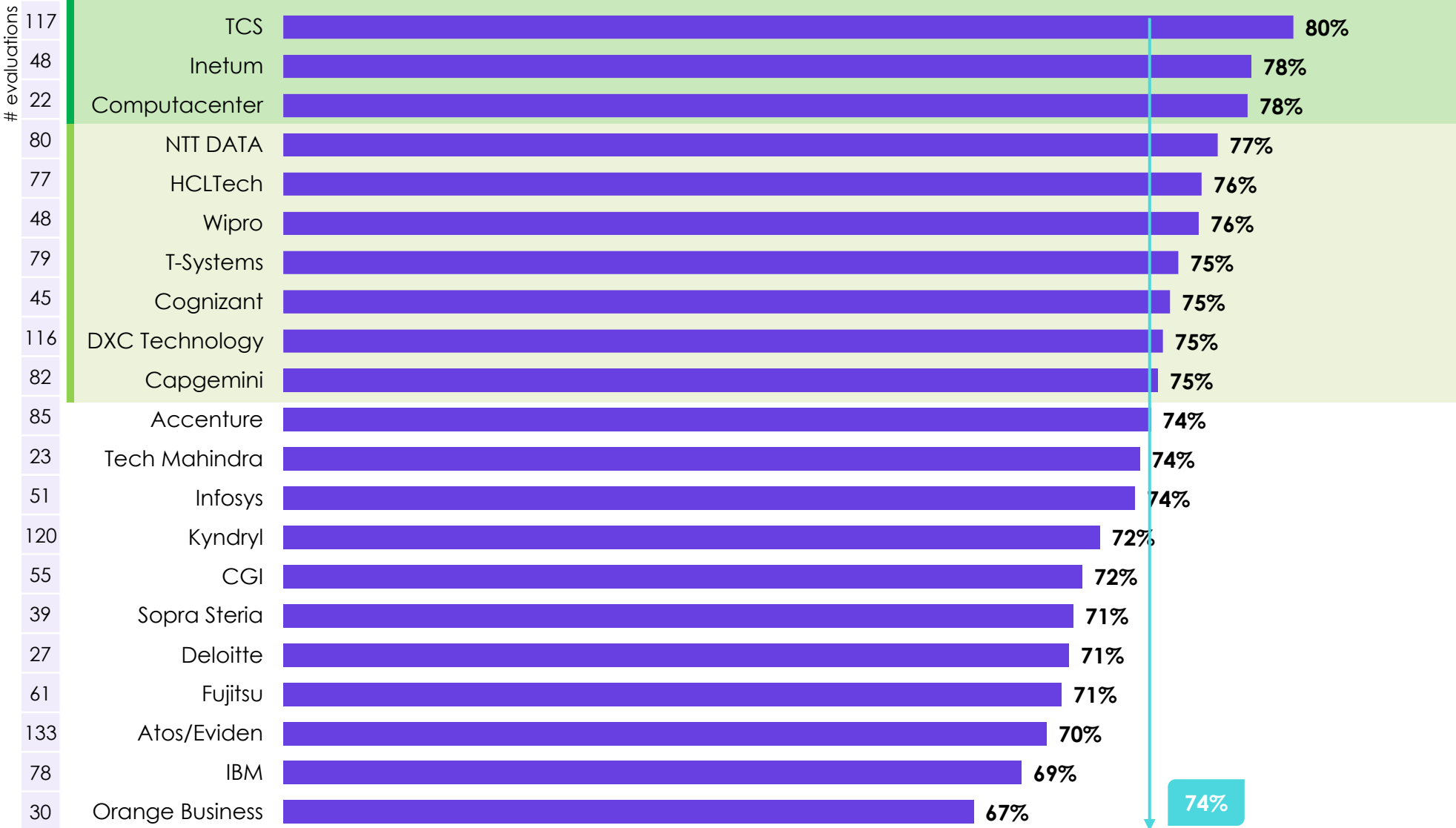
03

IT service provider performance

Satisfaction by IT service tower

Cloud & Infrastructure Services

Cloud & infrastructure services



Exceptional performers

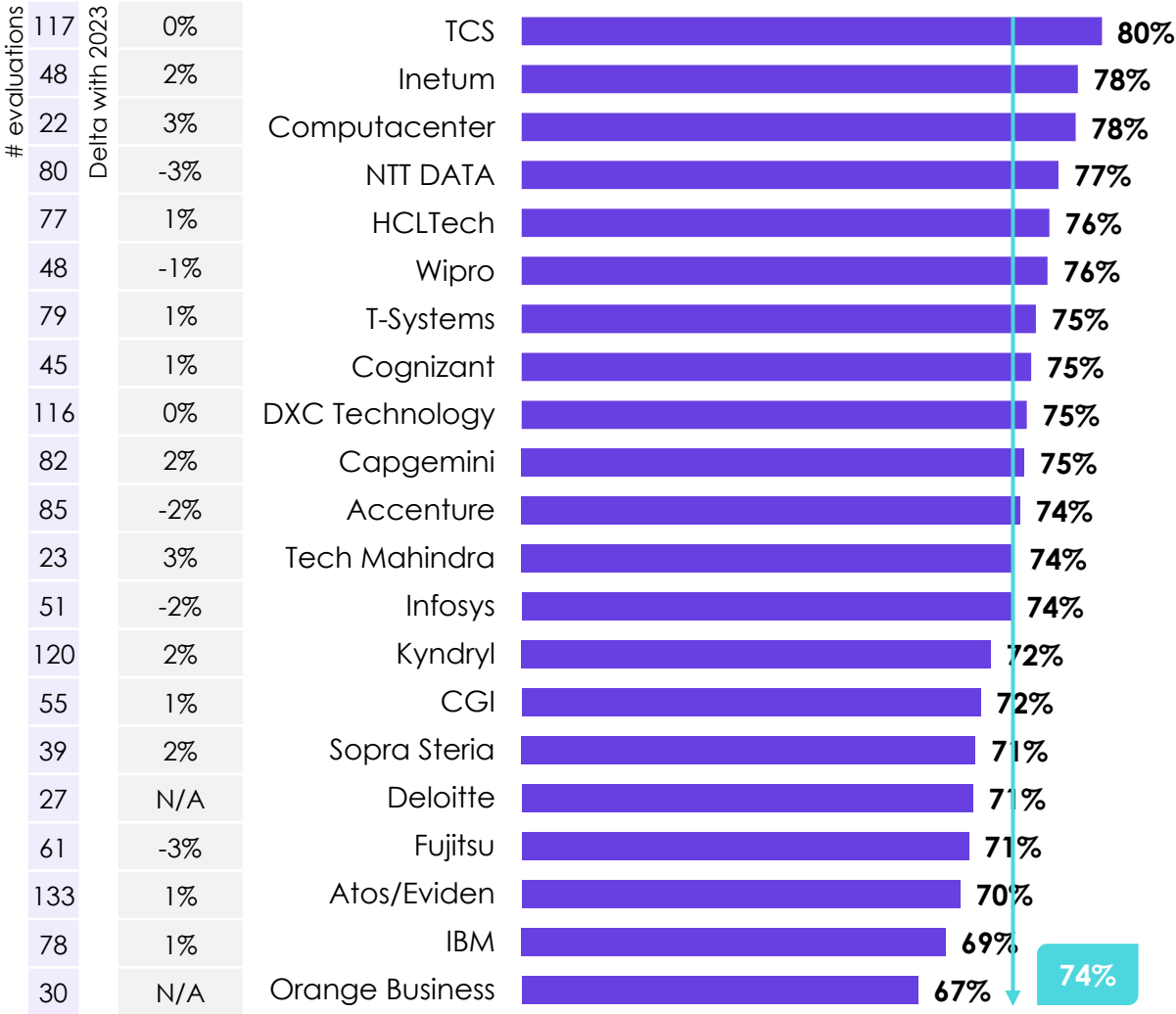
Strong performers

KEY TO SCORES

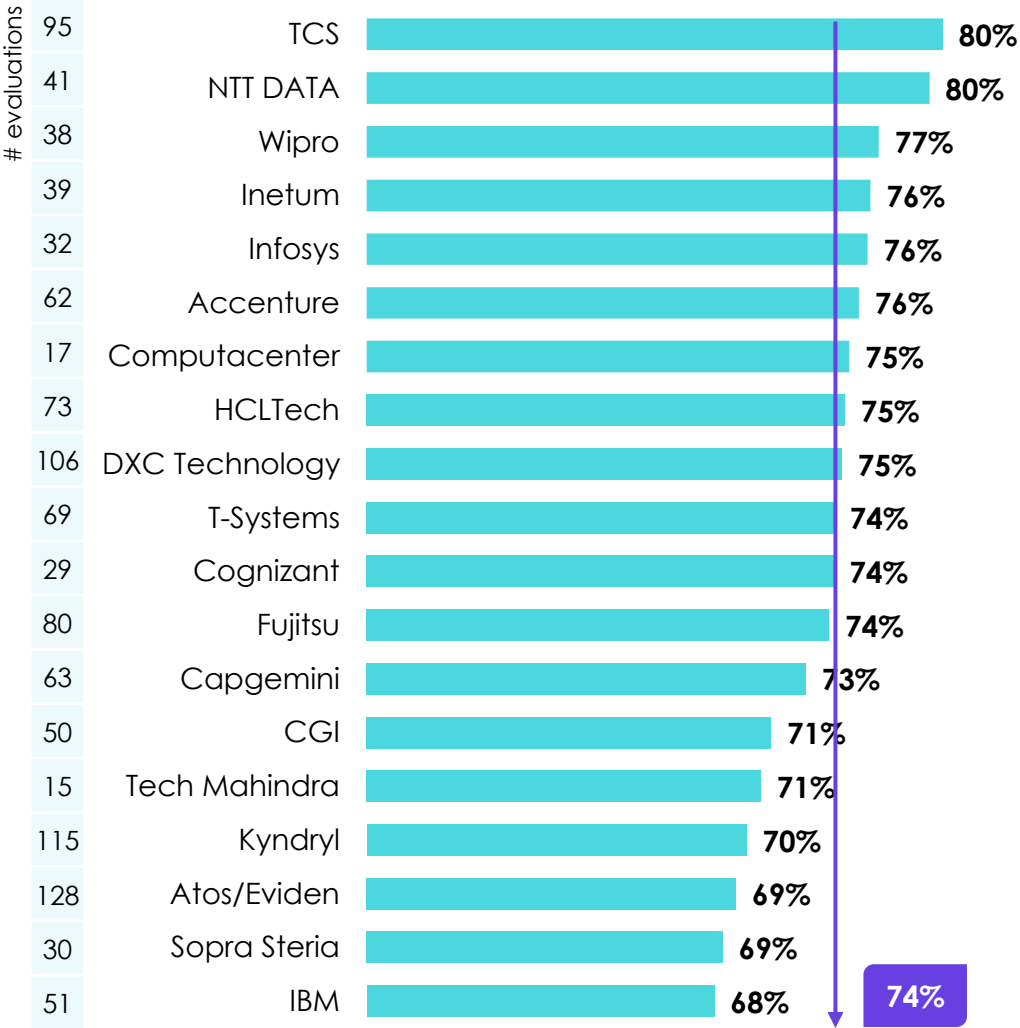
Very unsatisfied	0%
Unsatisfied	20%
Somewhat unsatisfied	40%
Somewhat satisfied	60%
Satisfied	80%
Very satisfied	100%

Cloud & infrastructure services (Comparison with 2023/2024)

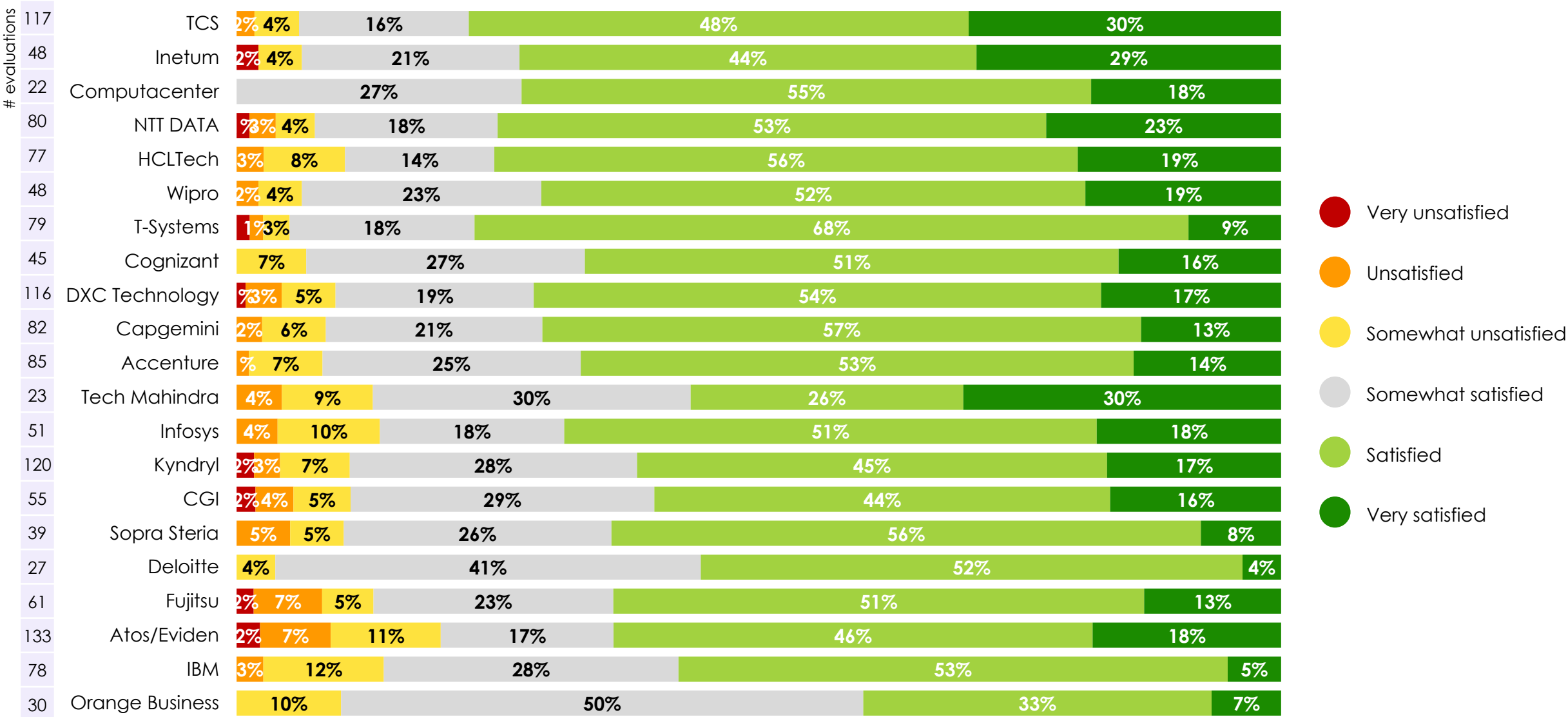
2024/2025



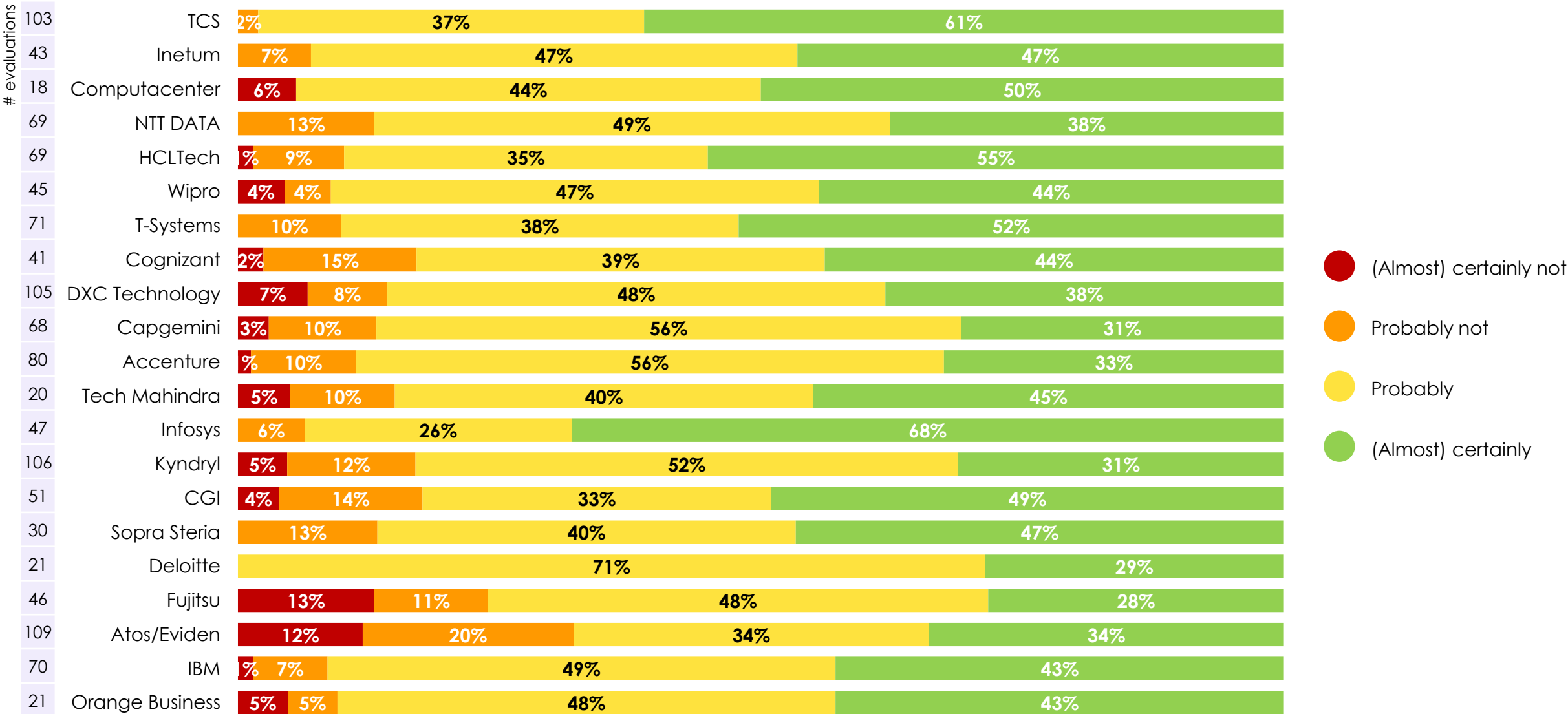
2023/2024



Cloud & infrastructure services (Detailed satisfaction)



Cloud & infrastructure services (Likelihood of contract renewal)

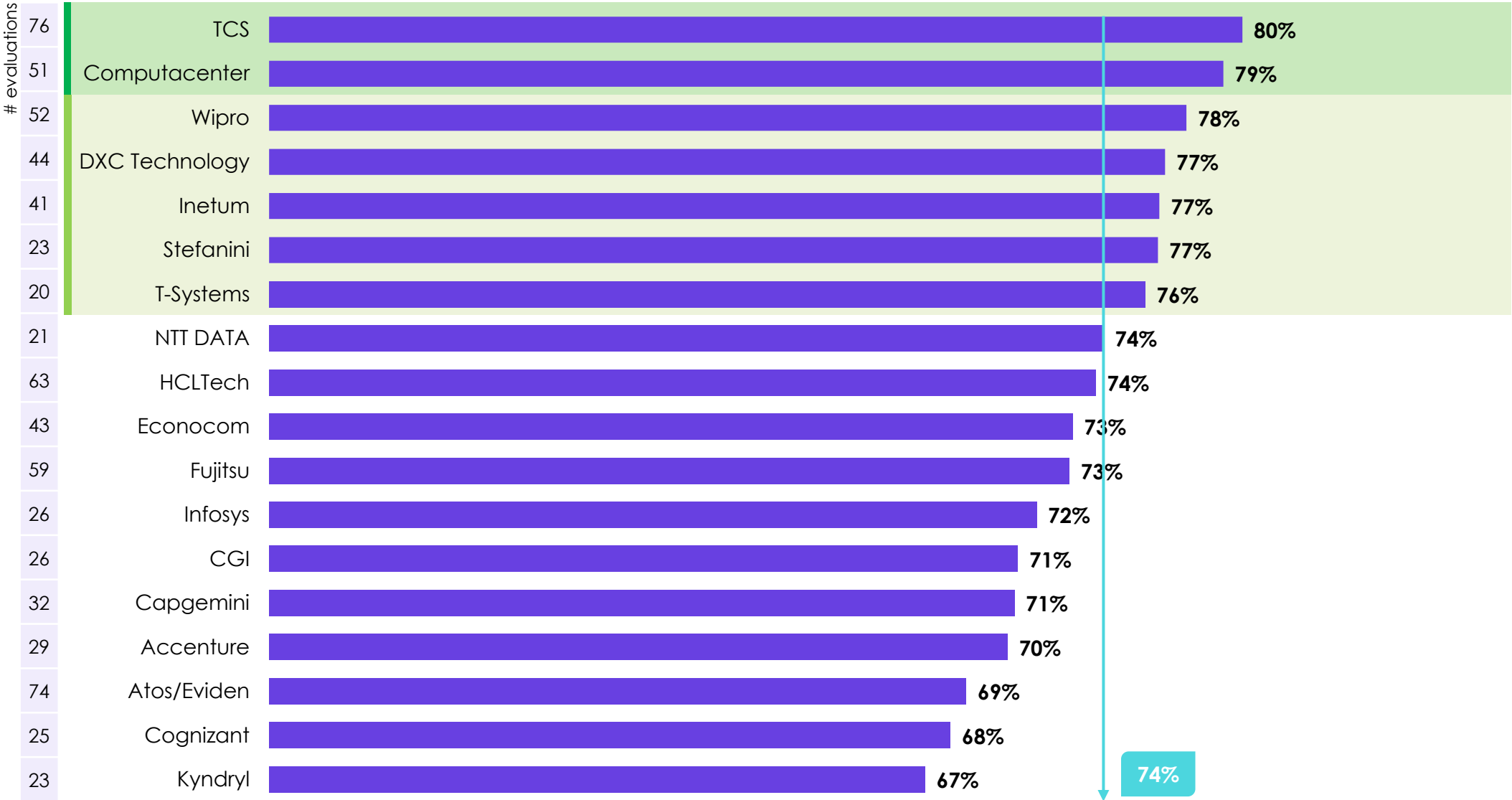


03

IT service provider performance

Satisfaction by IT service tower

Workplace Services



Exceptional performers

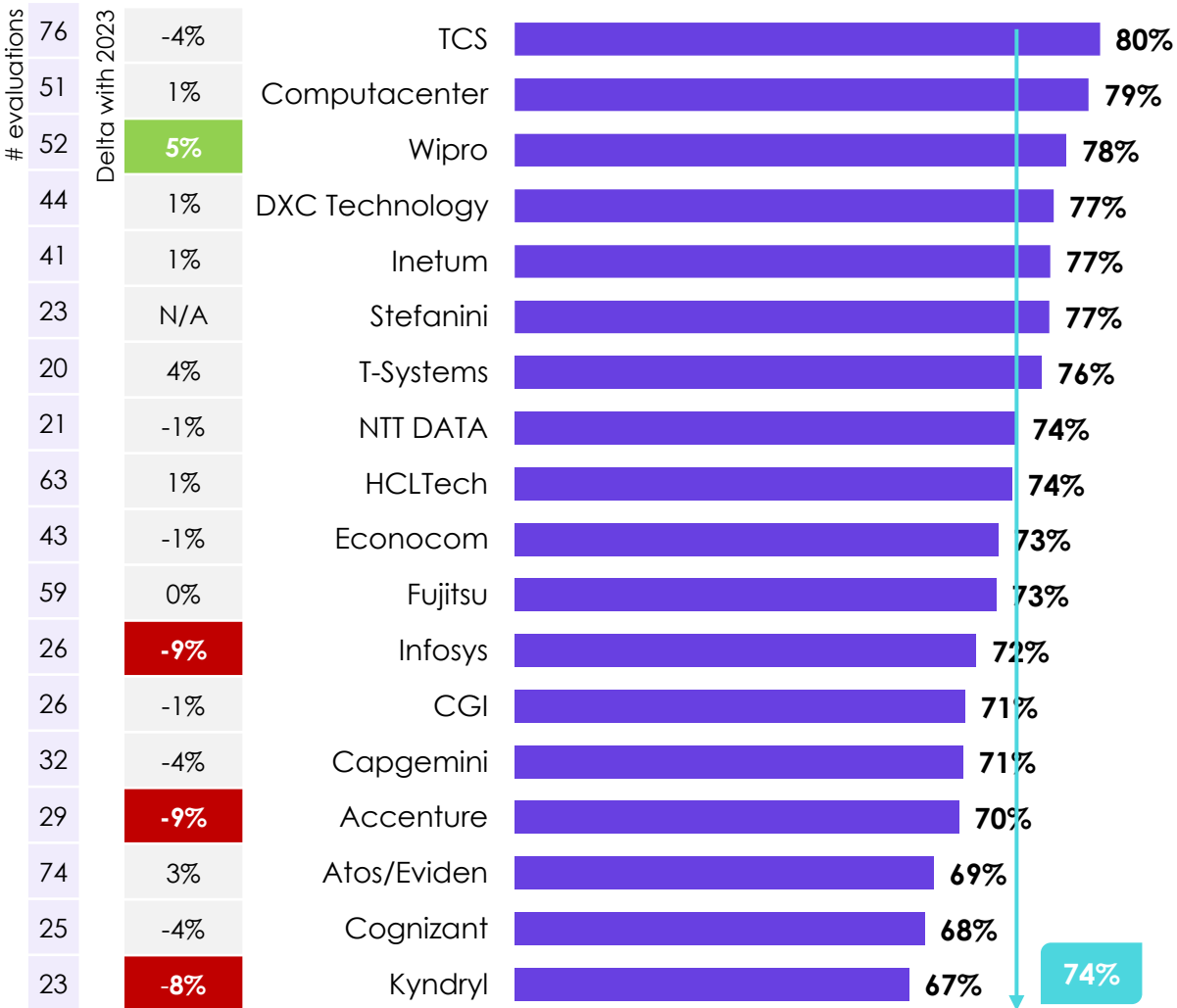
Strong performers

KEY TO SCORES

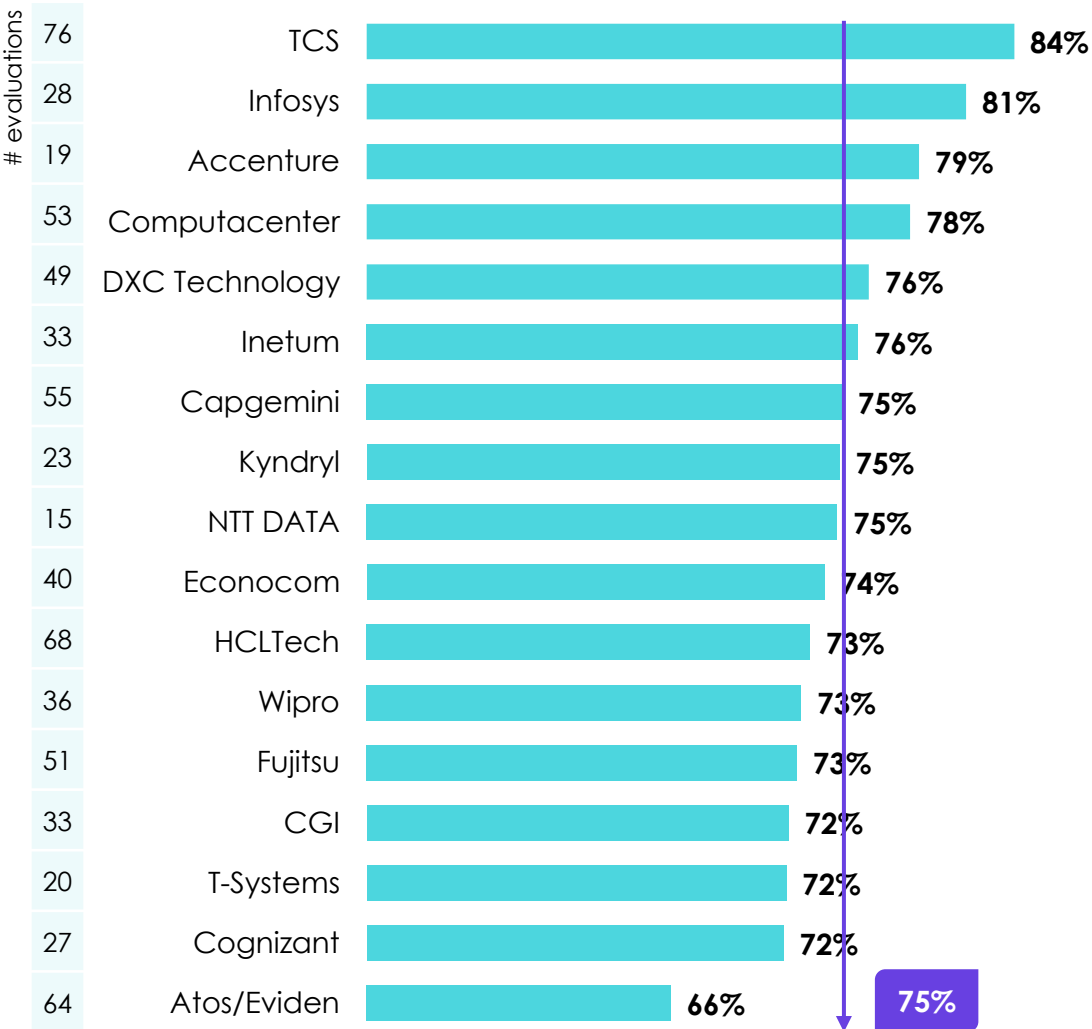
Very unsatisfied	0%
Unsatisfied	20%
Somewhat unsatisfied	40%
Somewhat satisfied	60%
Satisfied	80%
Very satisfied	100%

Workplace services (Comparison with 2023/2024)

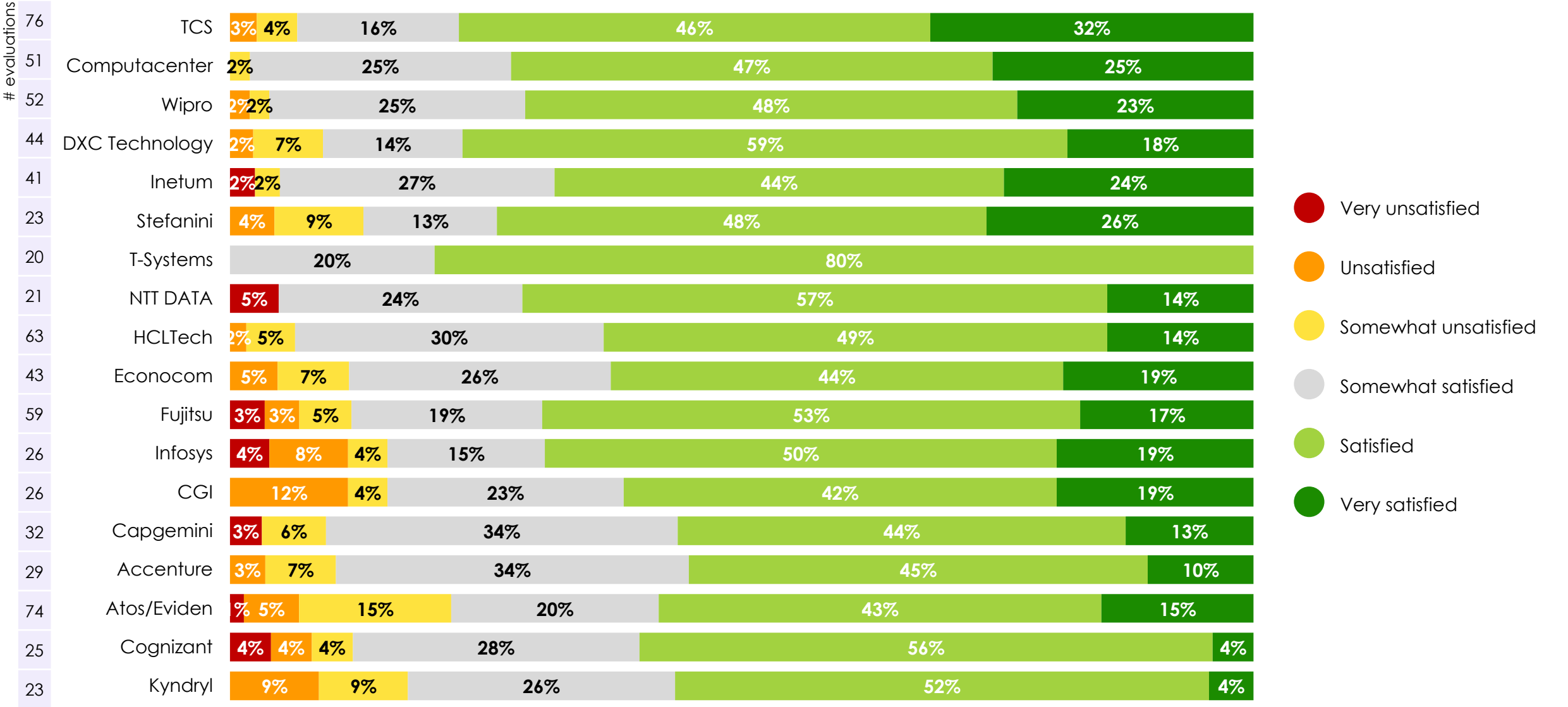
2024/2025



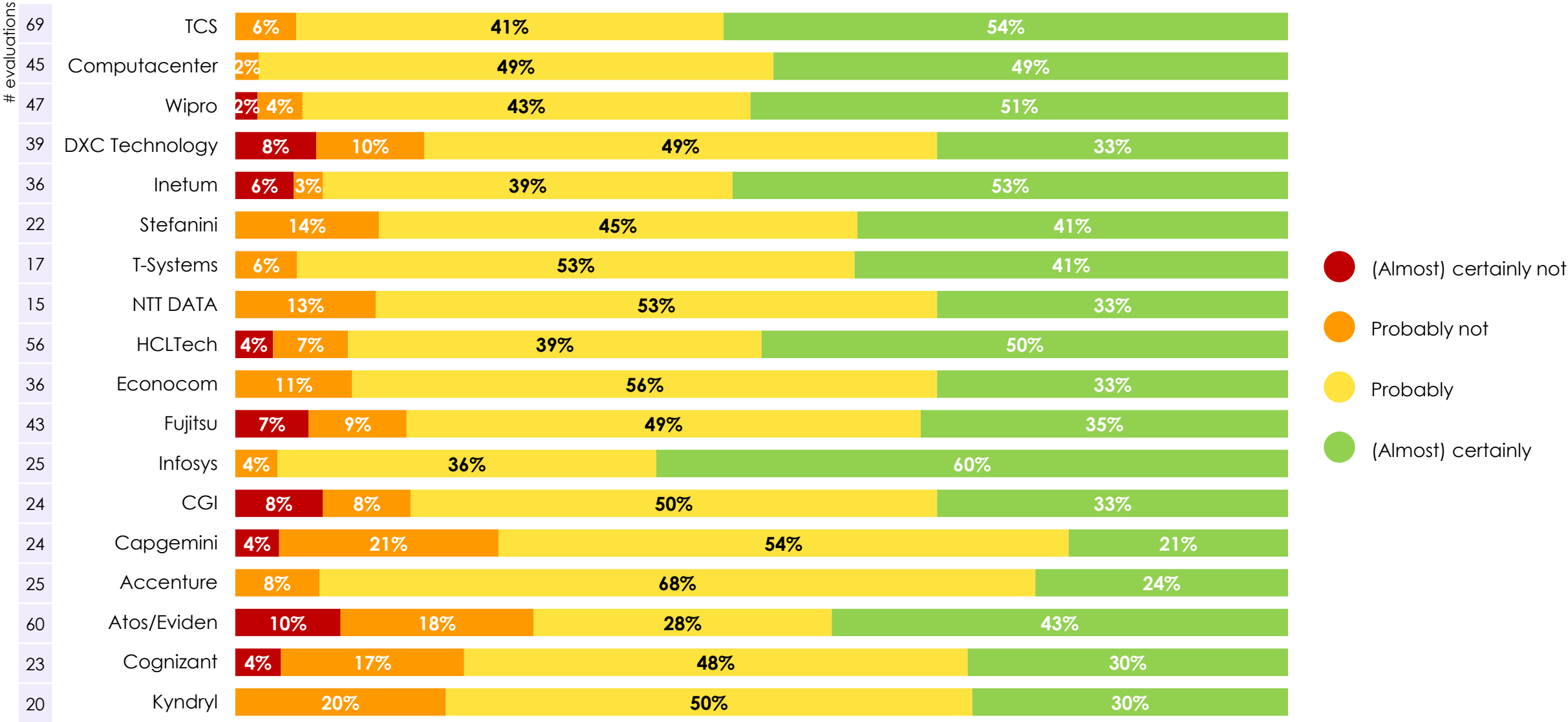
2023/2024



Workplace services (Detailed satisfaction)



Workplace services (Likeliness of contract renewal)



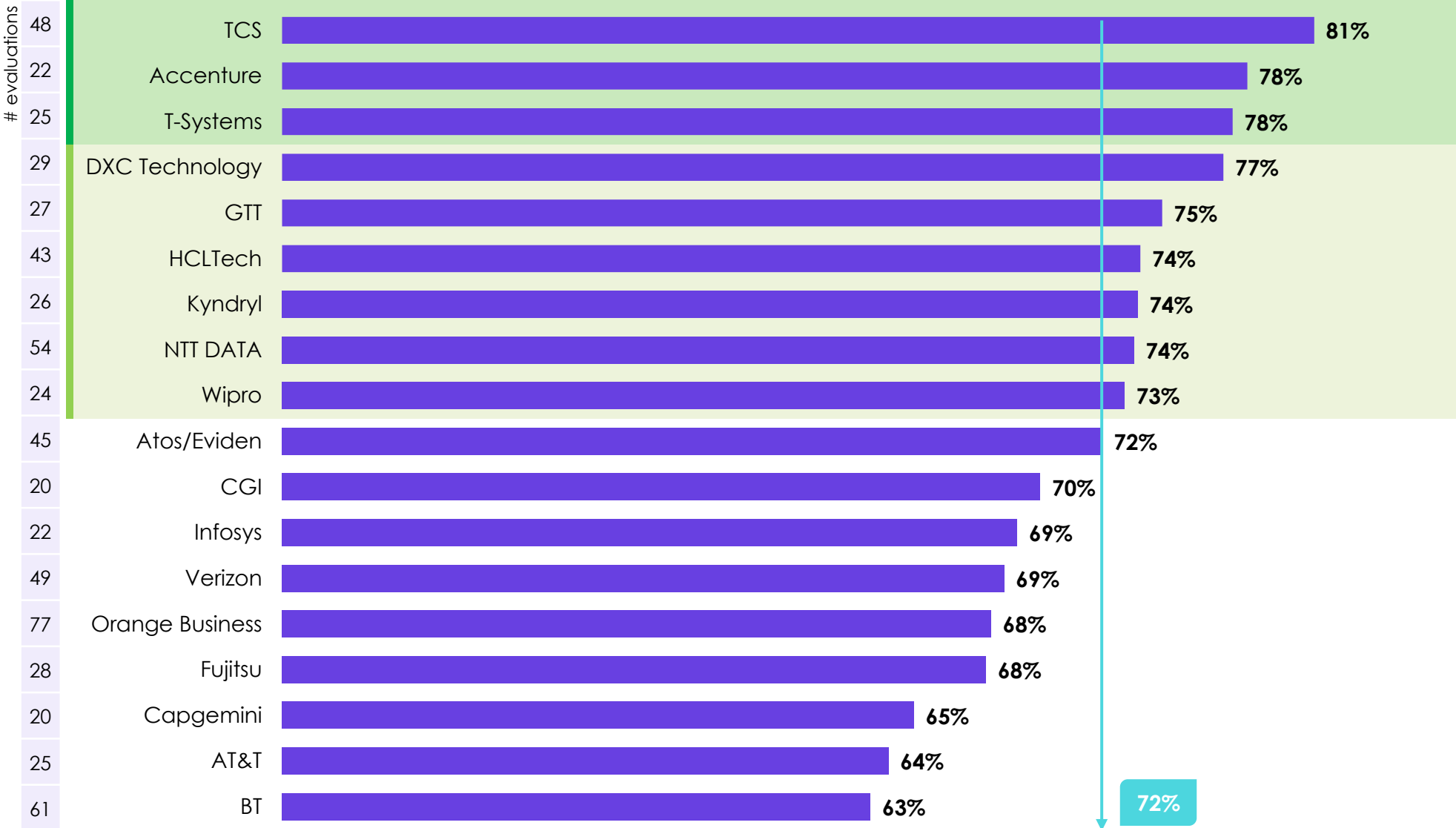
03

IT service provider performance

Satisfaction by IT service tower

Network & Connectivity Services

Network & connectivity services



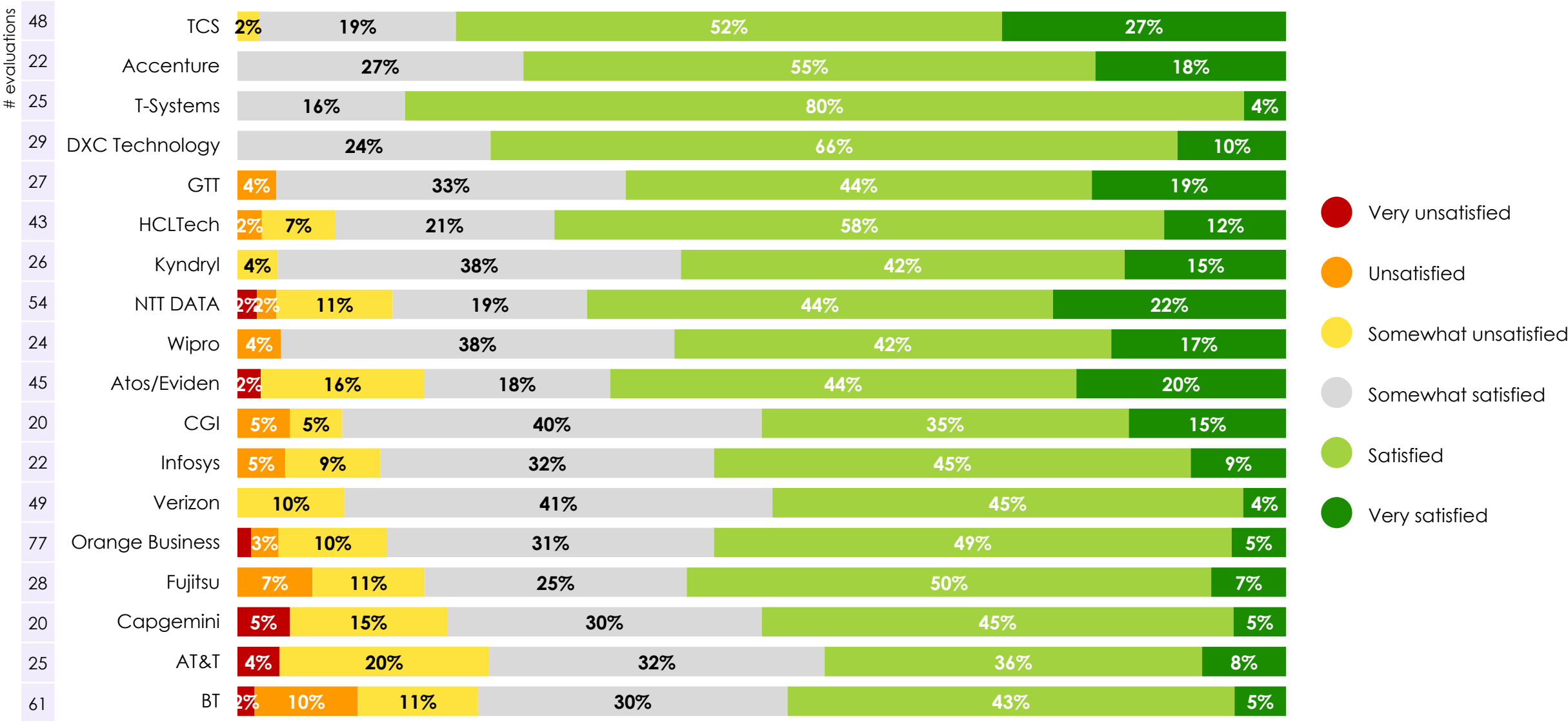
Exceptional performers

Strong performers

KEY TO SCORES

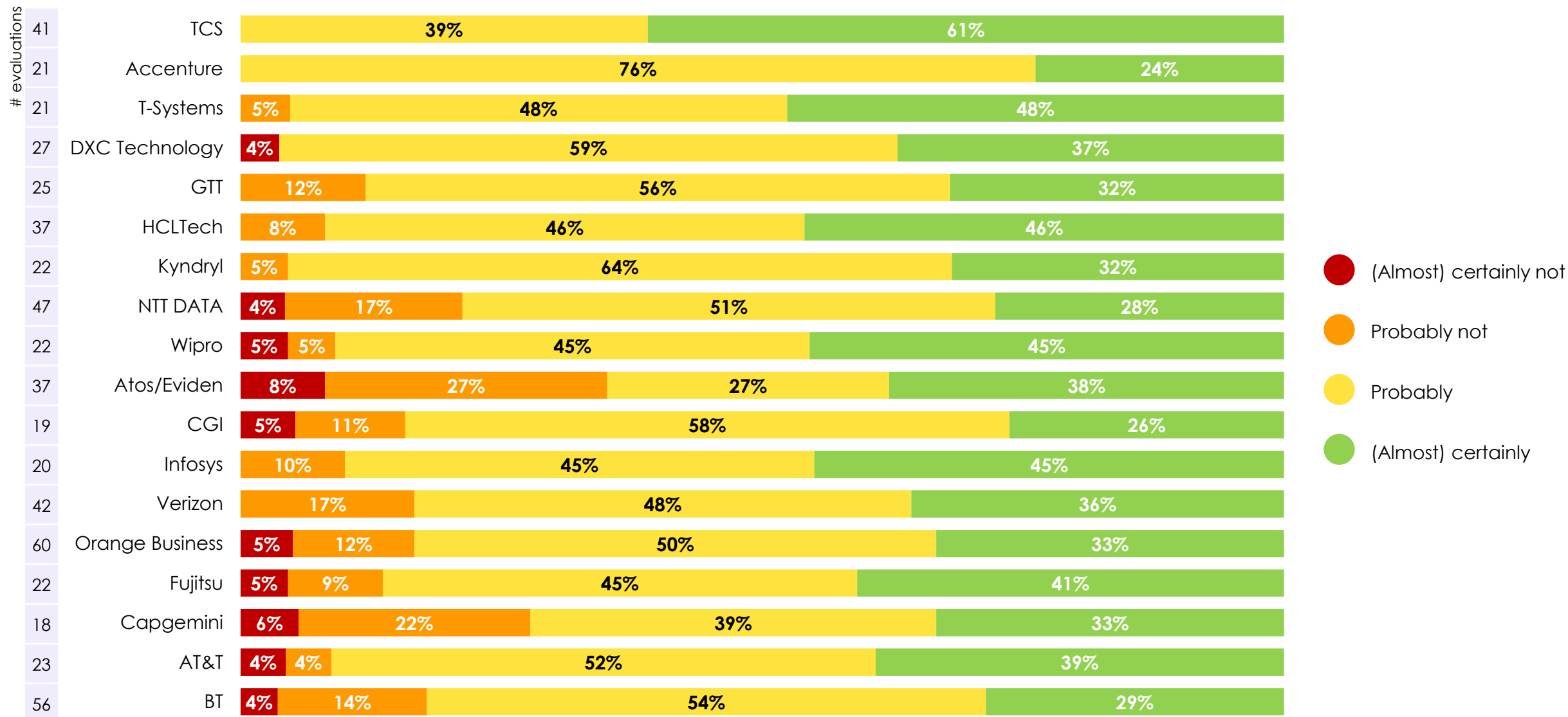
Very unsatisfied	0%
Unsatisfied	20%
Somewhat unsatisfied	40%
Somewhat satisfied	60%
Satisfied	80%
Very satisfied	100%

Network & connectivity services (Detailed satisfaction)



Network & connectivity services (Likelihood of contract renewal)

03
Satisfaction by
IT service tower

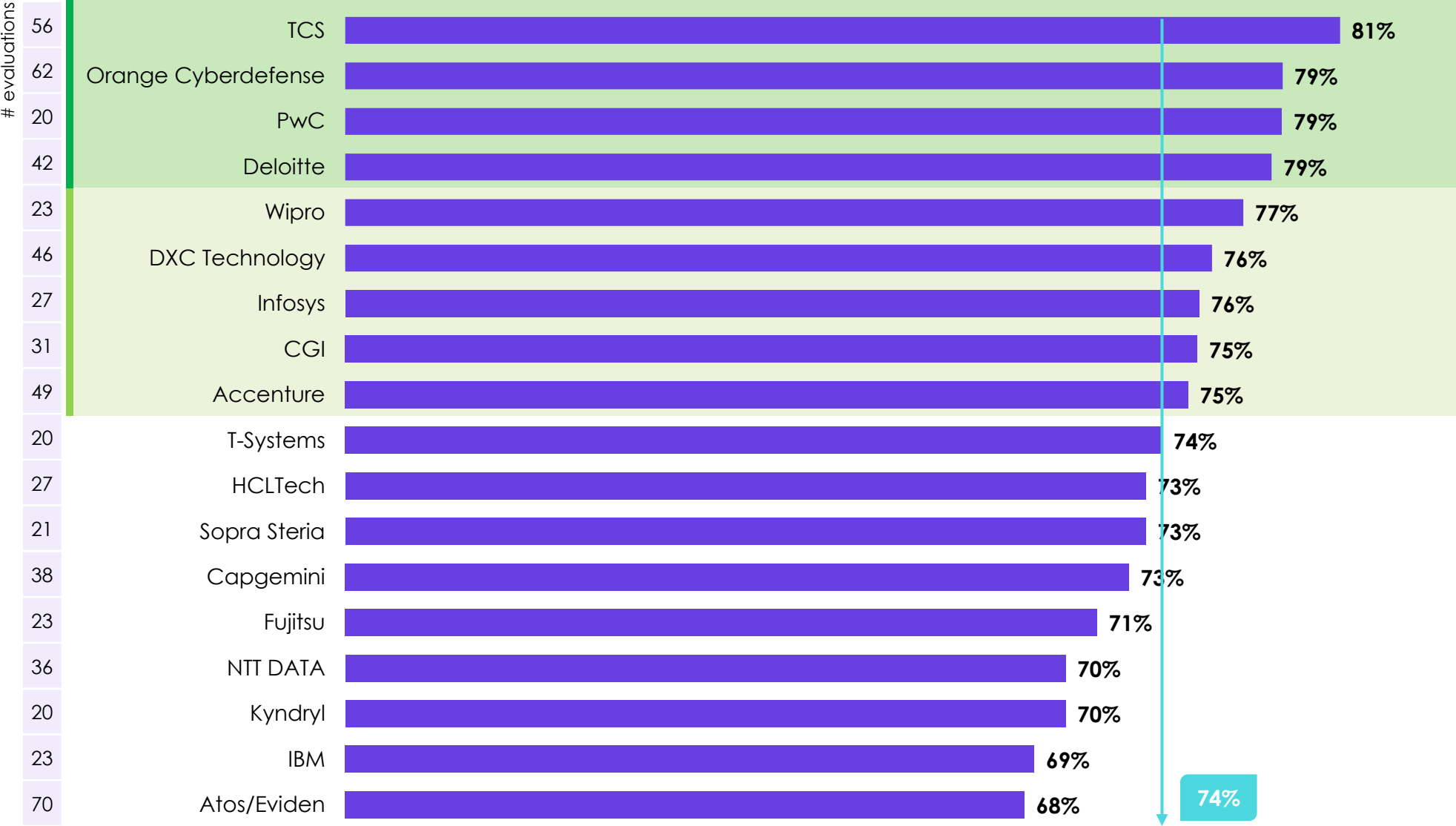


03

IT service provider performance

Satisfaction by IT service tower

Security Services



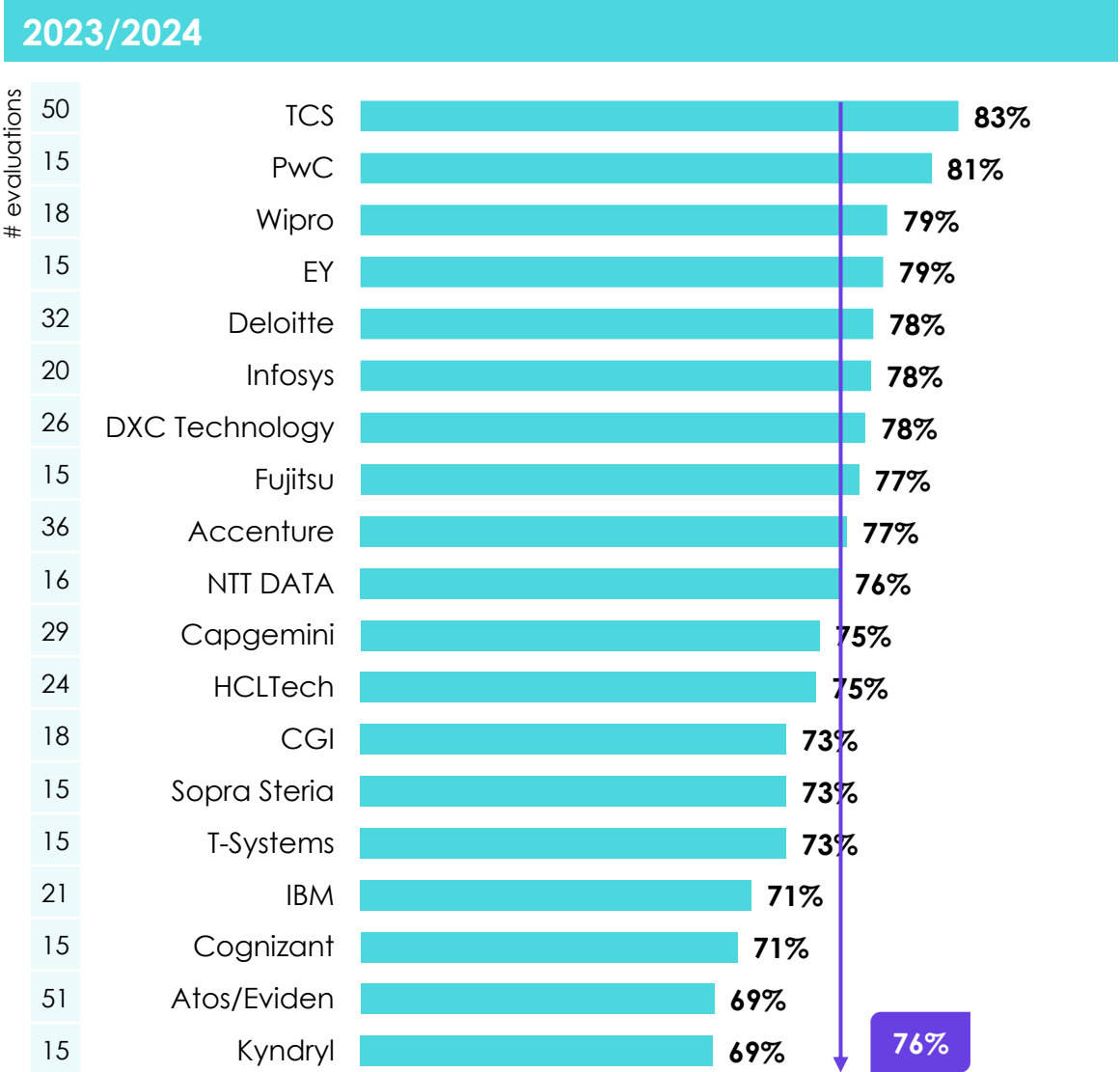
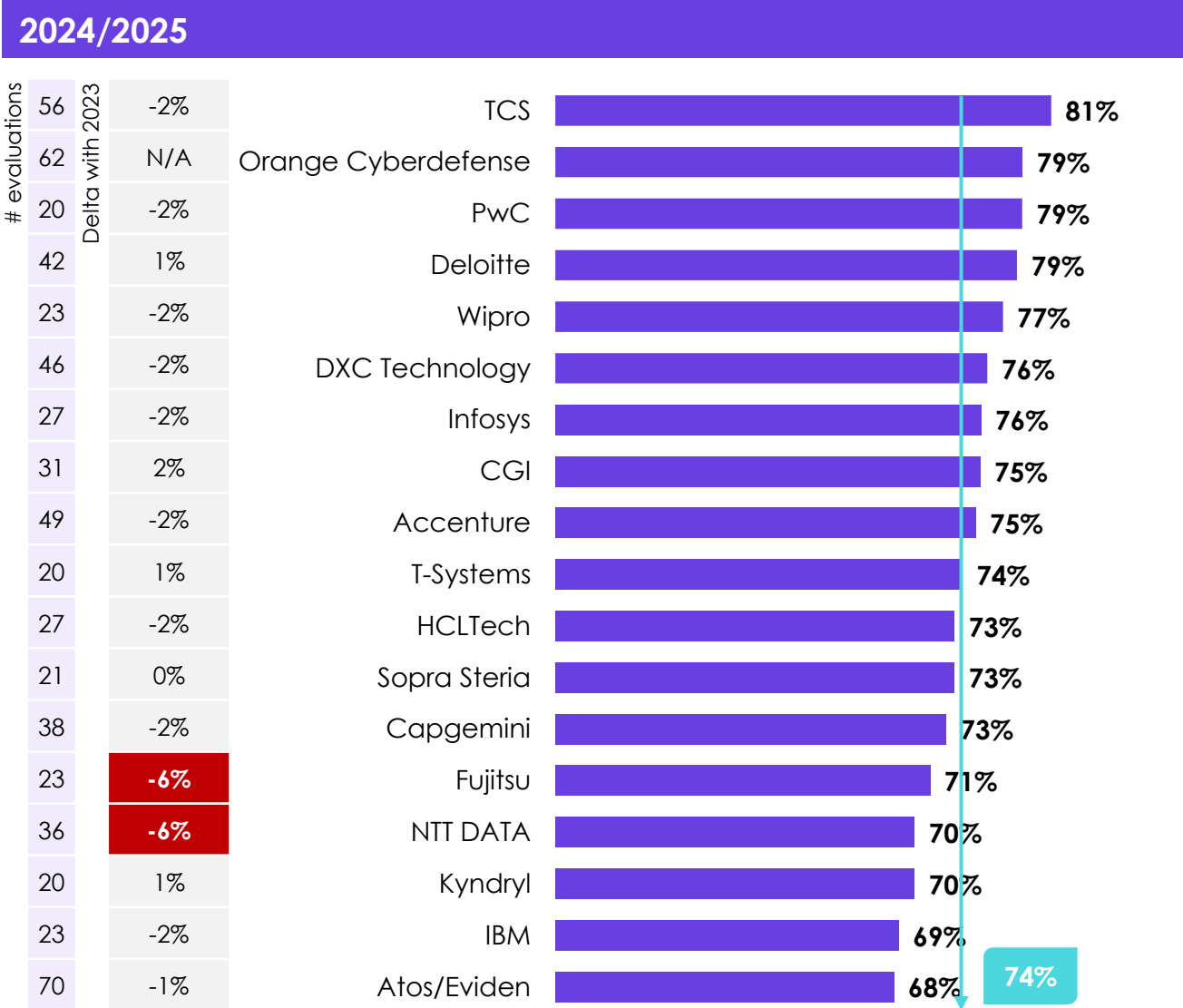
Exceptional performers

Strong performers

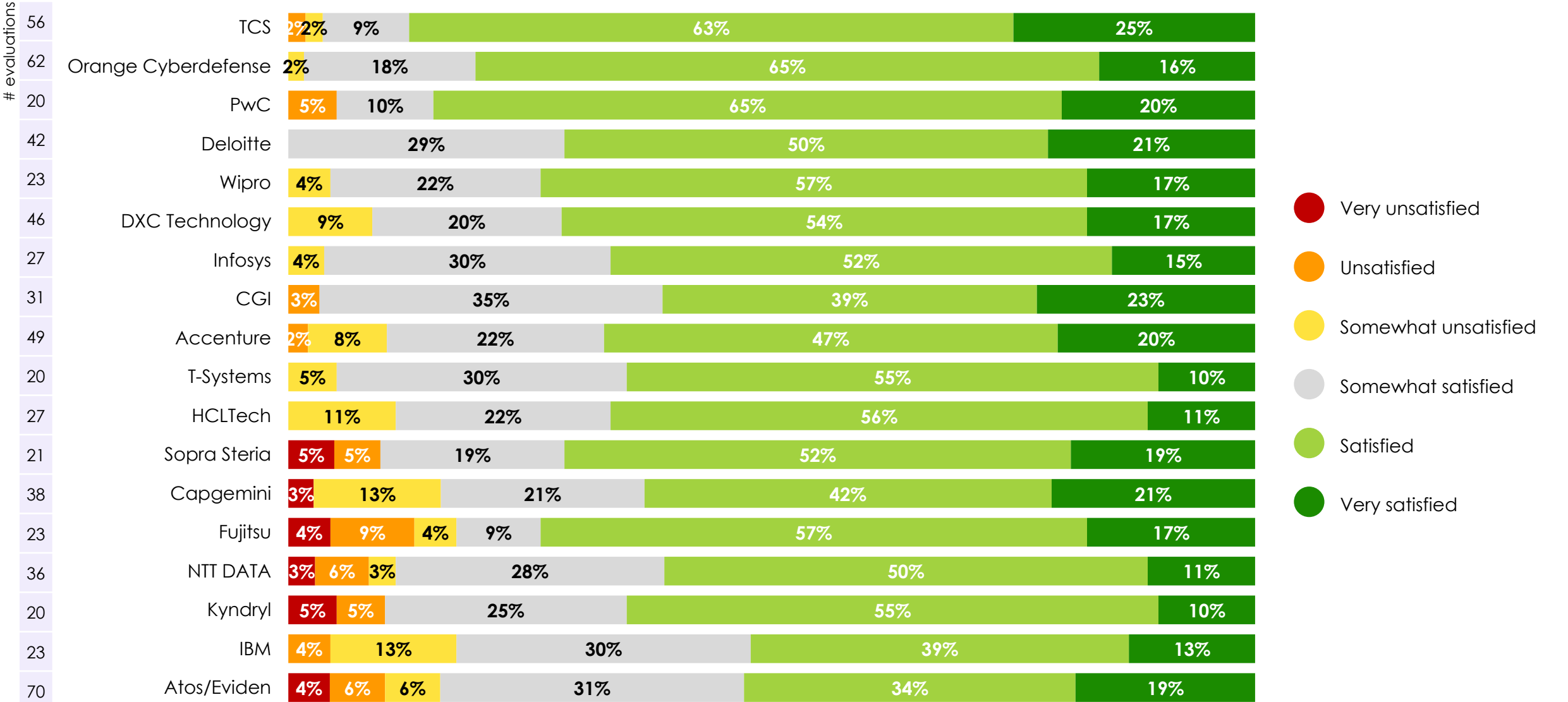
KEY TO SCORES

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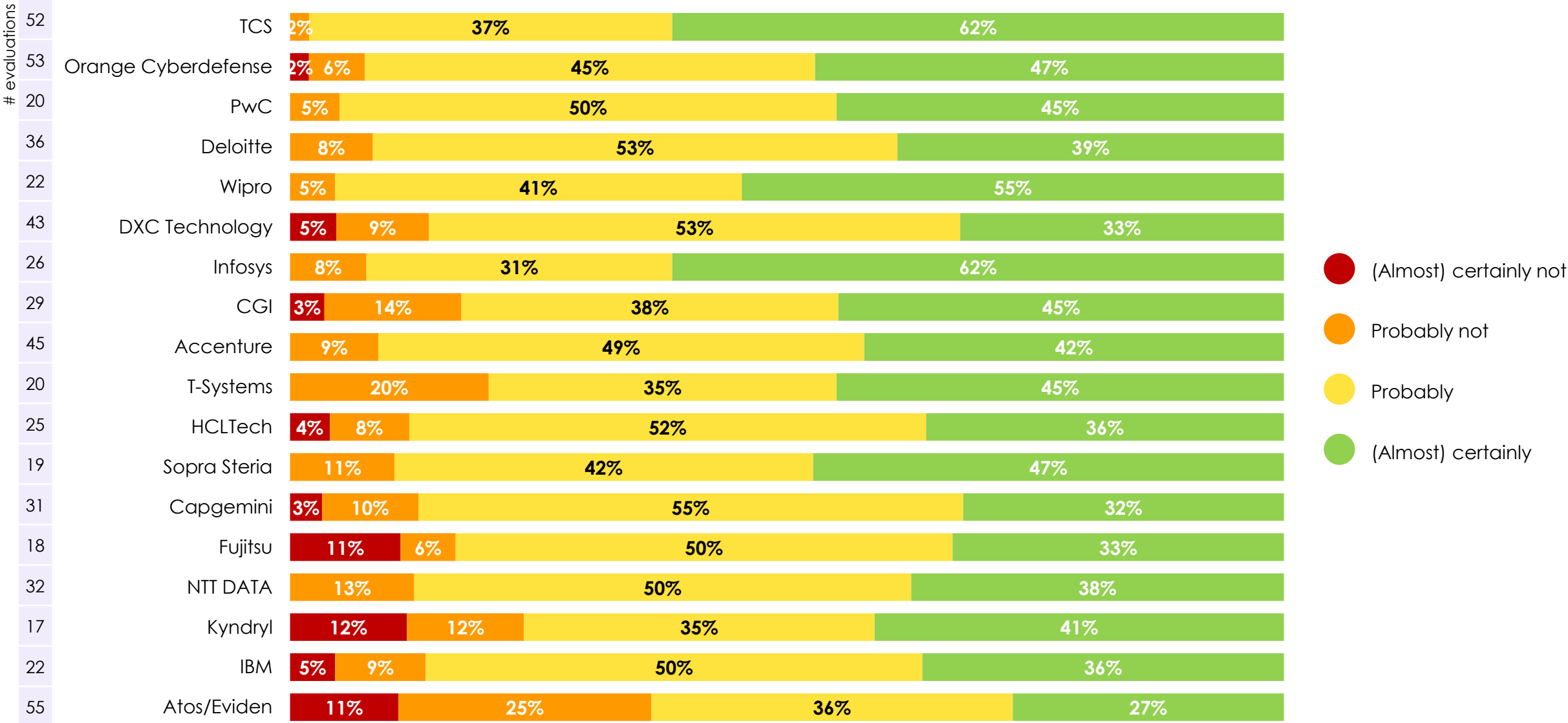
Security services (Comparison with 2023/2024)



Security services (Detailed satisfaction)



Security services (Likelihood of contract renewal)



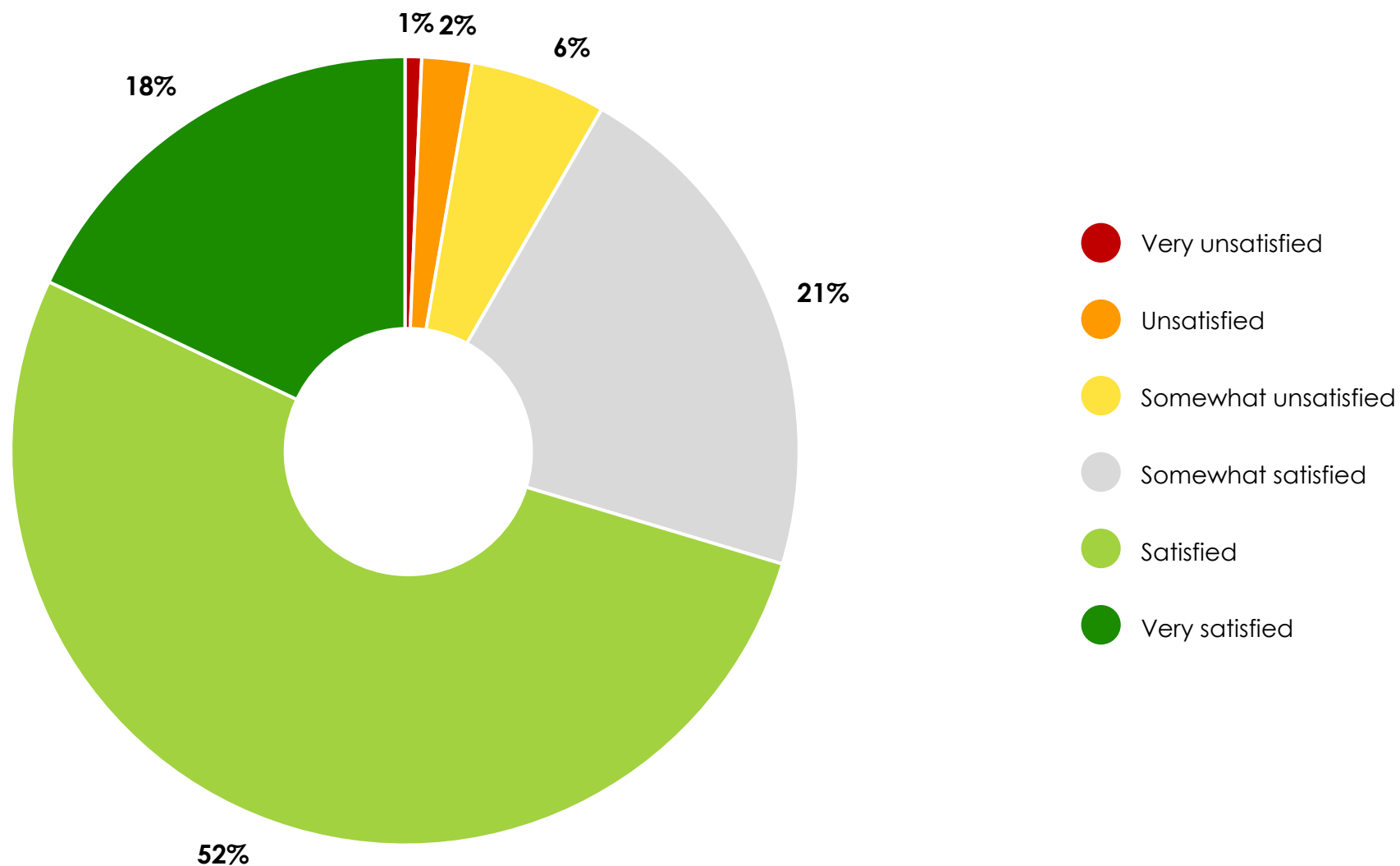


03

IT service provider performance

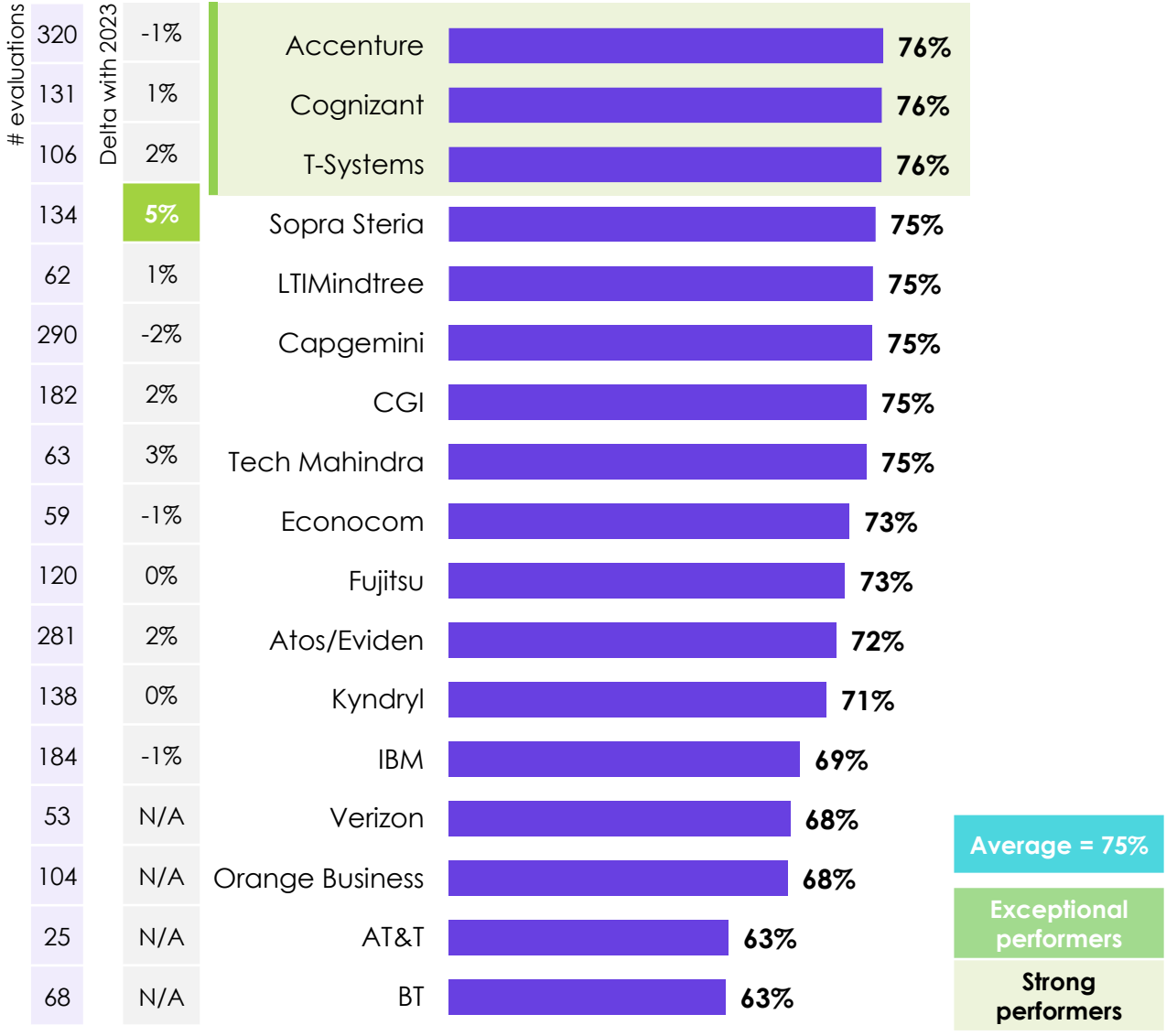
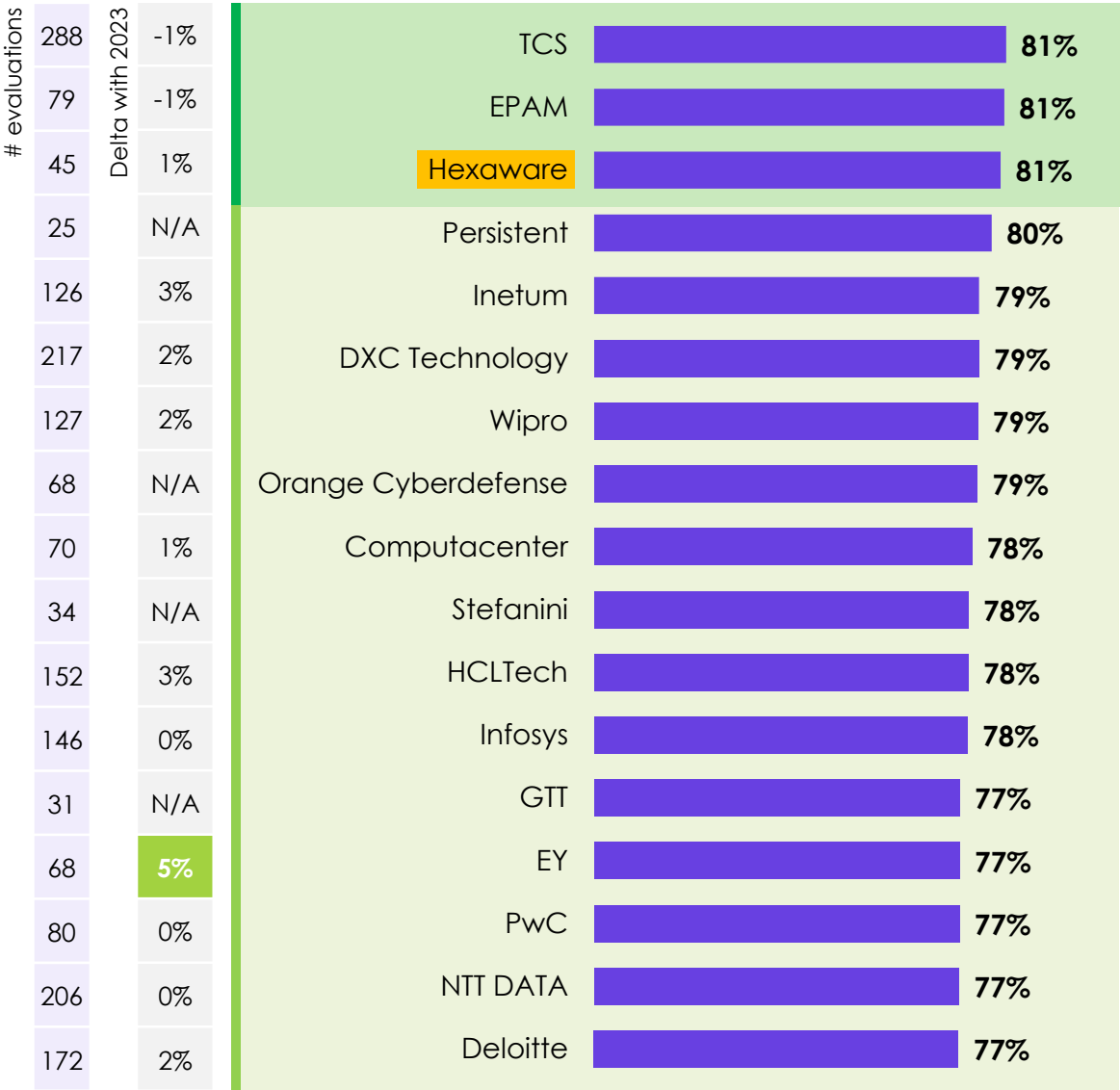
General satisfaction

General satisfaction across all IT sourcing relationships



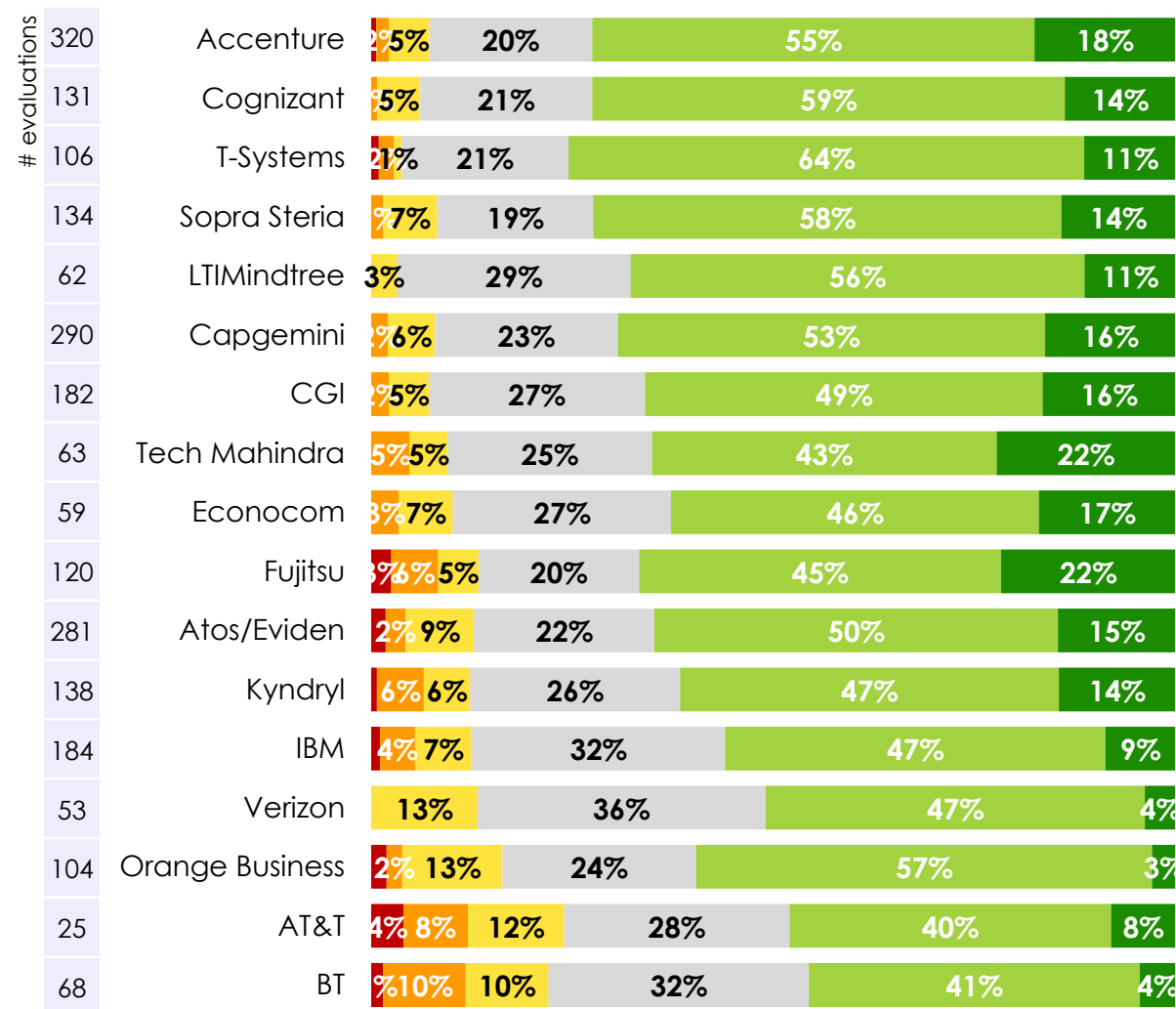
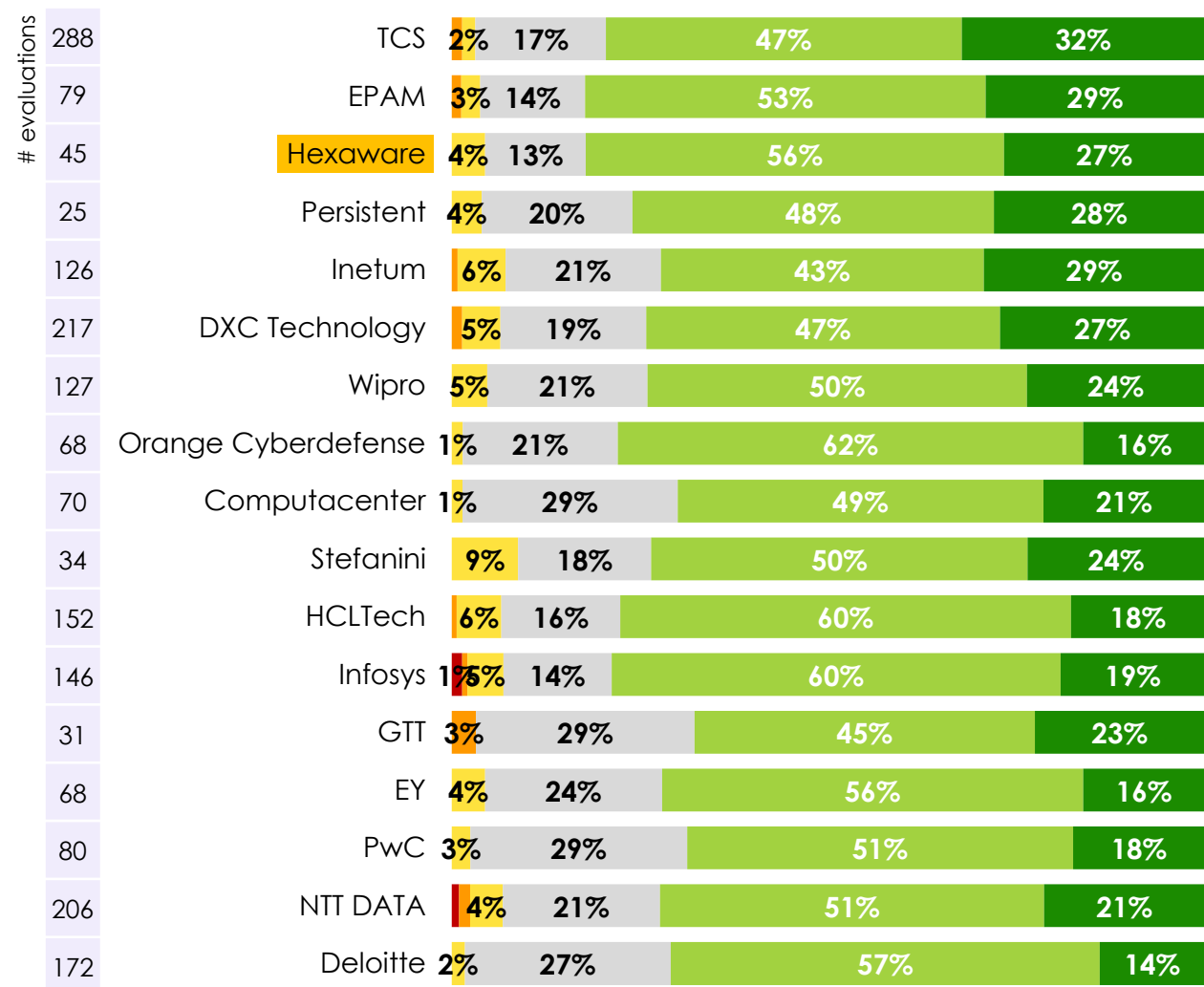
N=6,272

General satisfaction with service providers: Europe 2024/2025

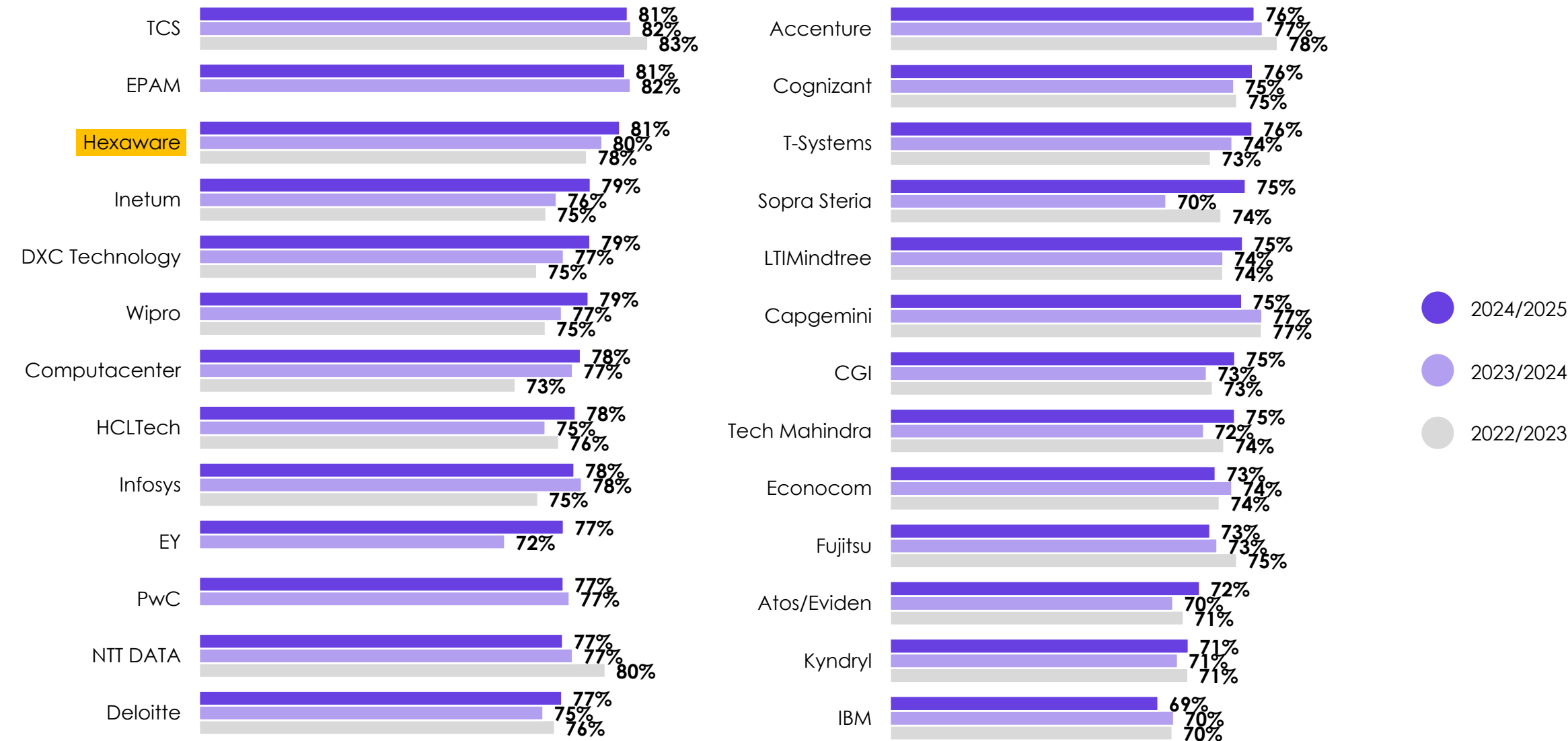


General satisfaction with service providers (Detailed satisfaction)

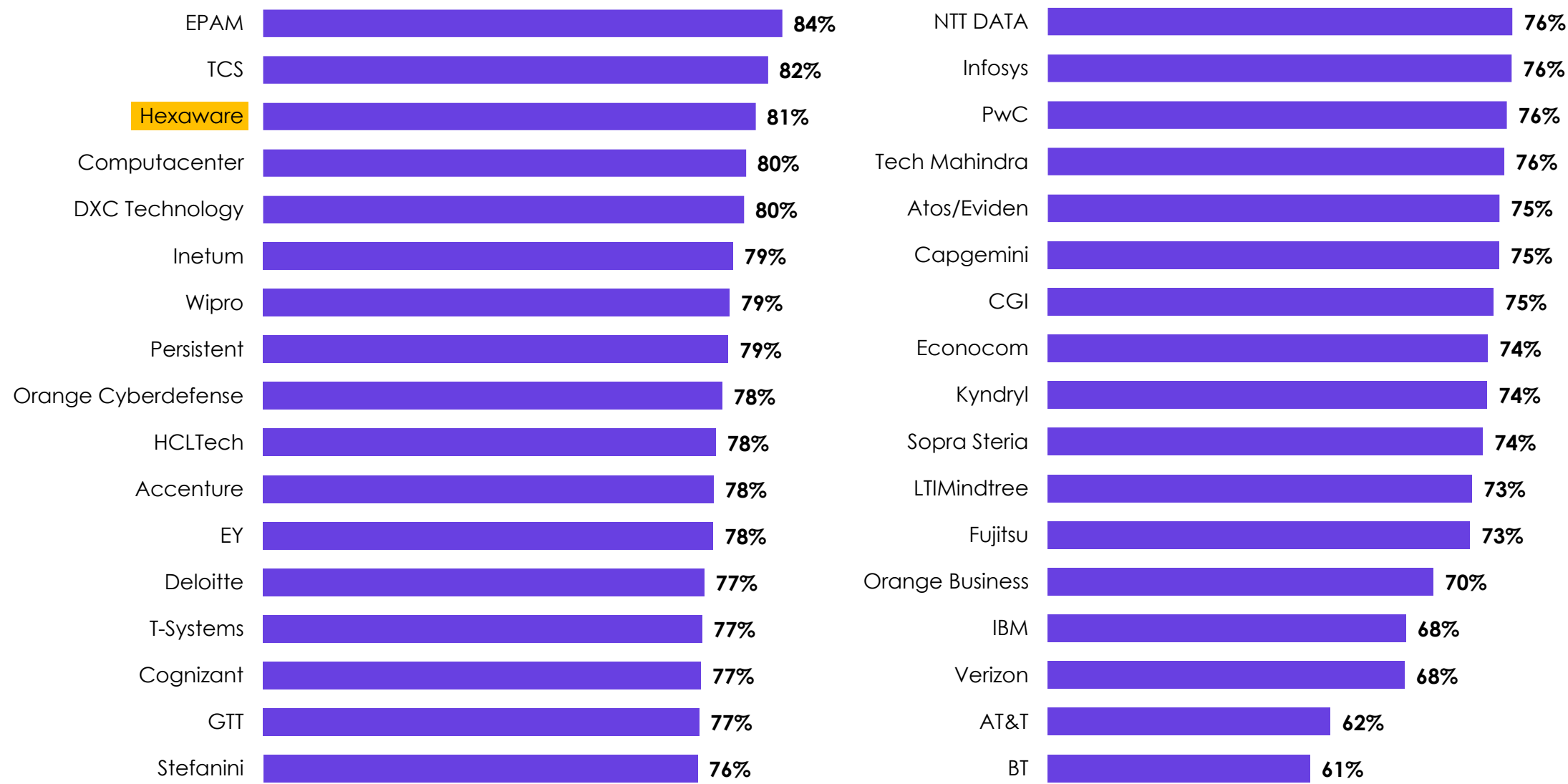
● Very unsatisfied
 ● Unsatisfied
 ● Somewhat unsatisfied
 ● Somewhat satisfied
 ● Satisfied
 ● Very satisfied



General satisfaction with service providers (3-year history)

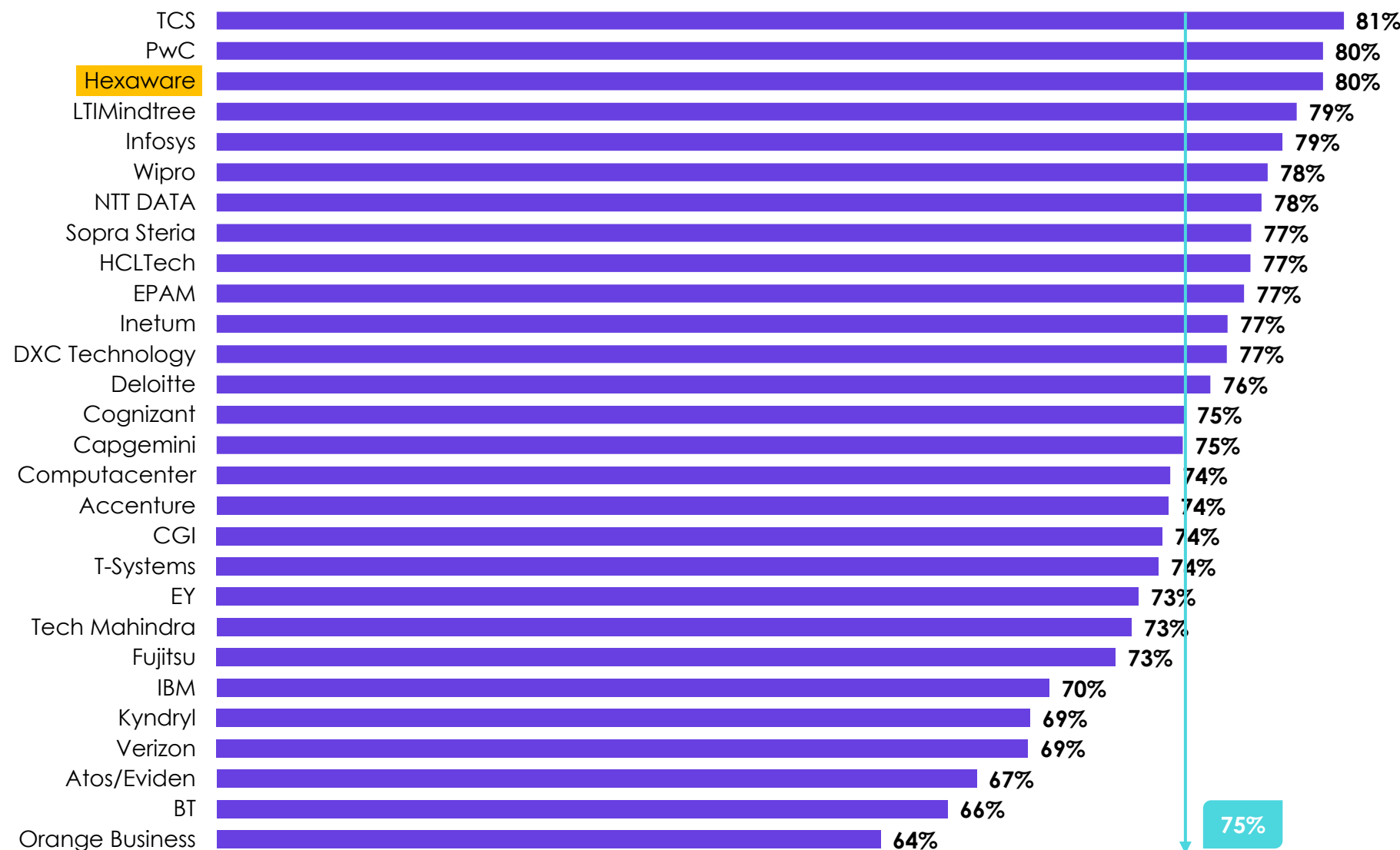


General satisfaction with service providers: Based on contracts with an Annual Contract Value of <5 million EUR



Average = 76%

General satisfaction with service providers: Based on contracts with an Annual Contract Value of >5 million EUR



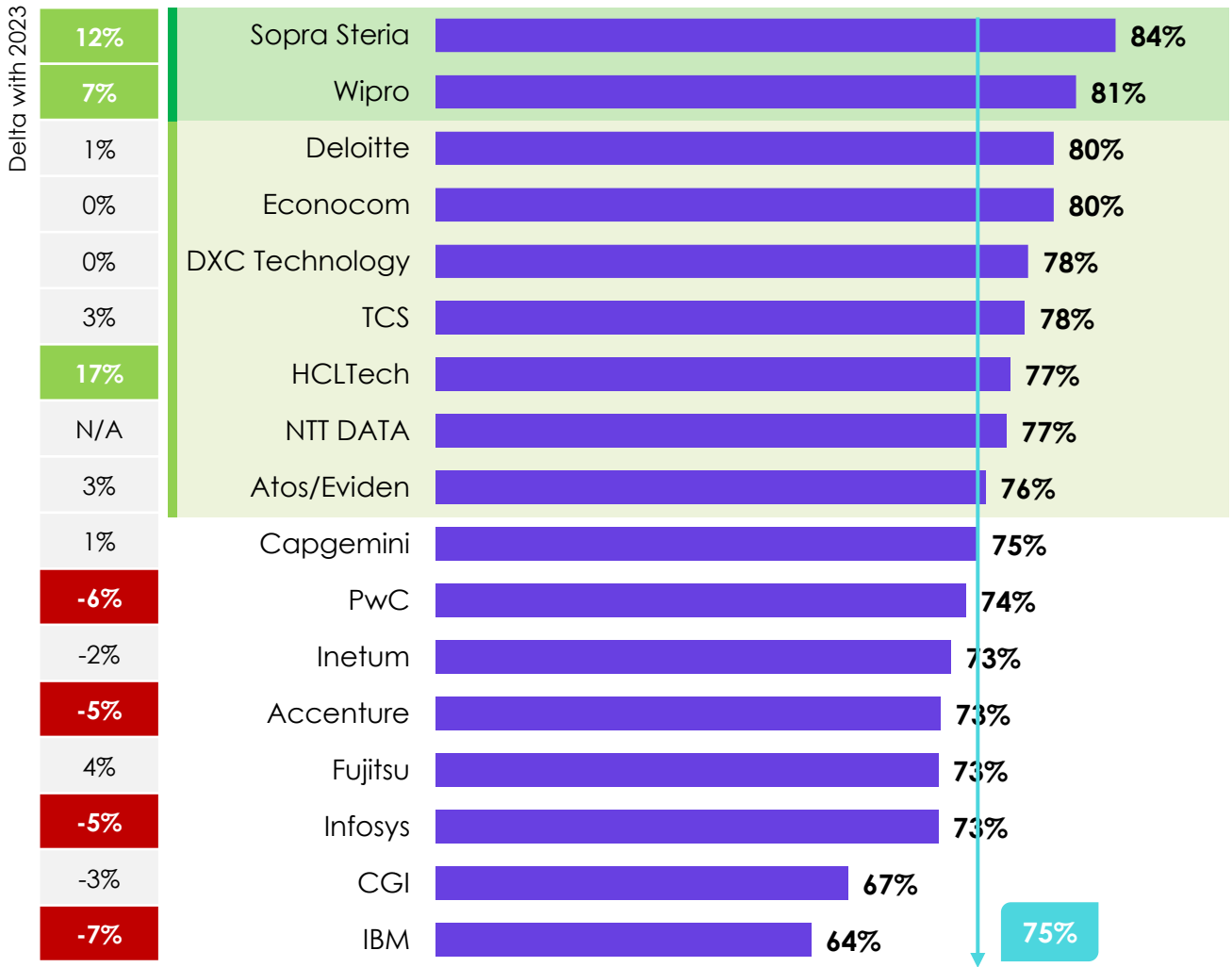
KEY TO SCORES	
Very unsatisfied	0%
Unsatisfied	20%
Somewhat unsatisfied	40%
Somewhat satisfied	60%
Satisfied	80%
Very satisfied	100%

General satisfaction with service providers: Energy & Utilities

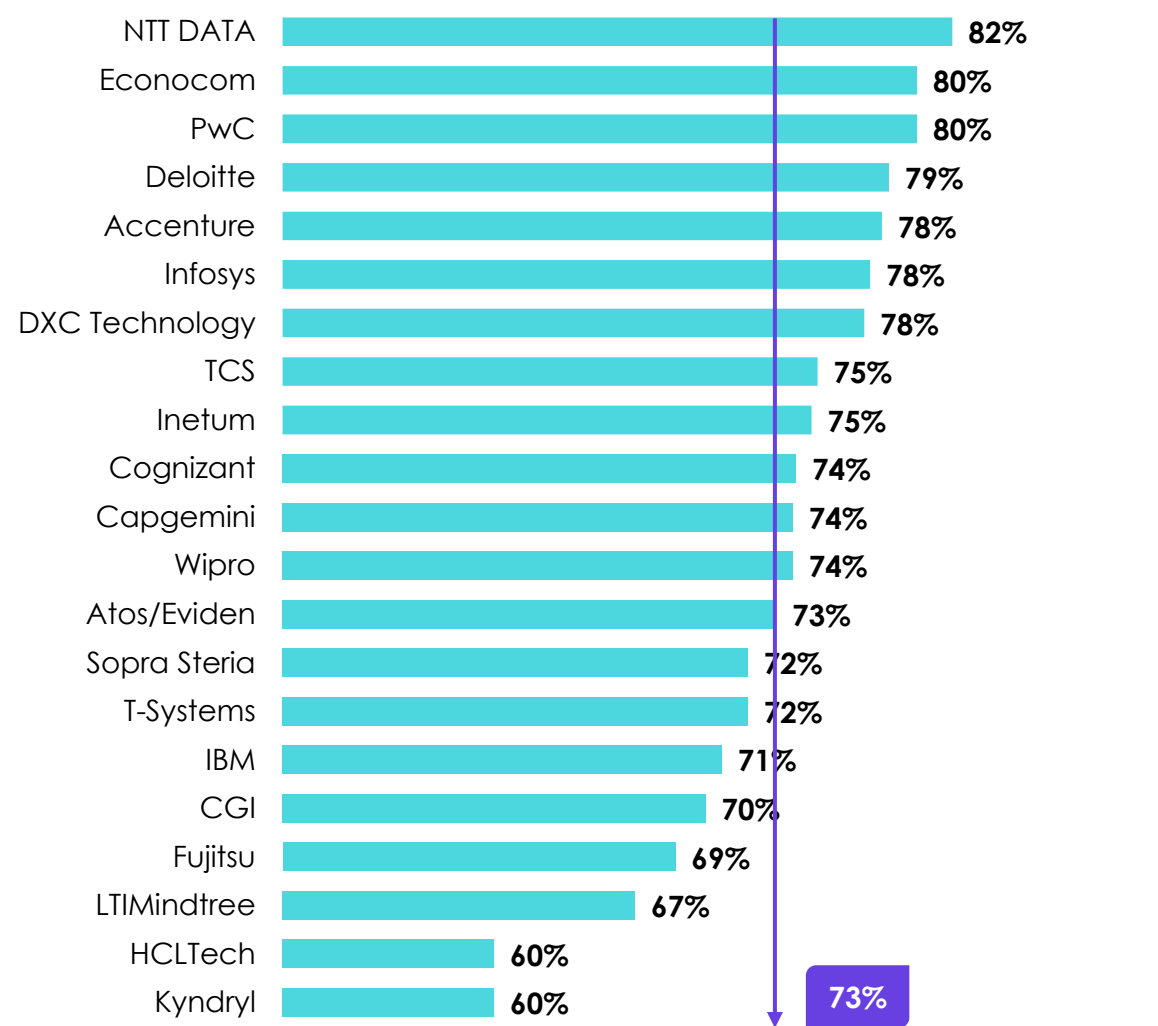
Exceptional performers
Strong performers

03
General satisfaction

2024/2025



2023/2024

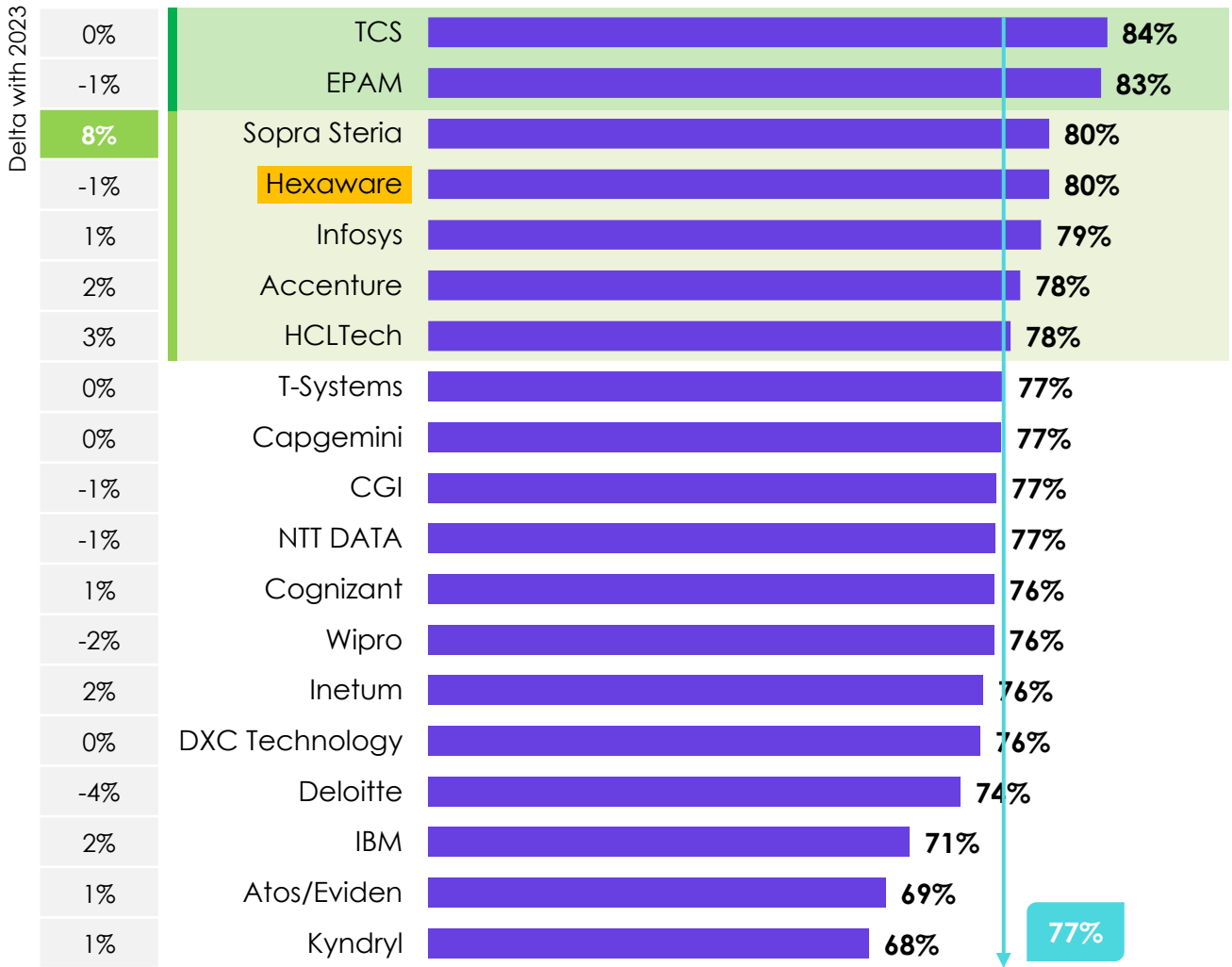


General satisfaction with service providers: Financial Services

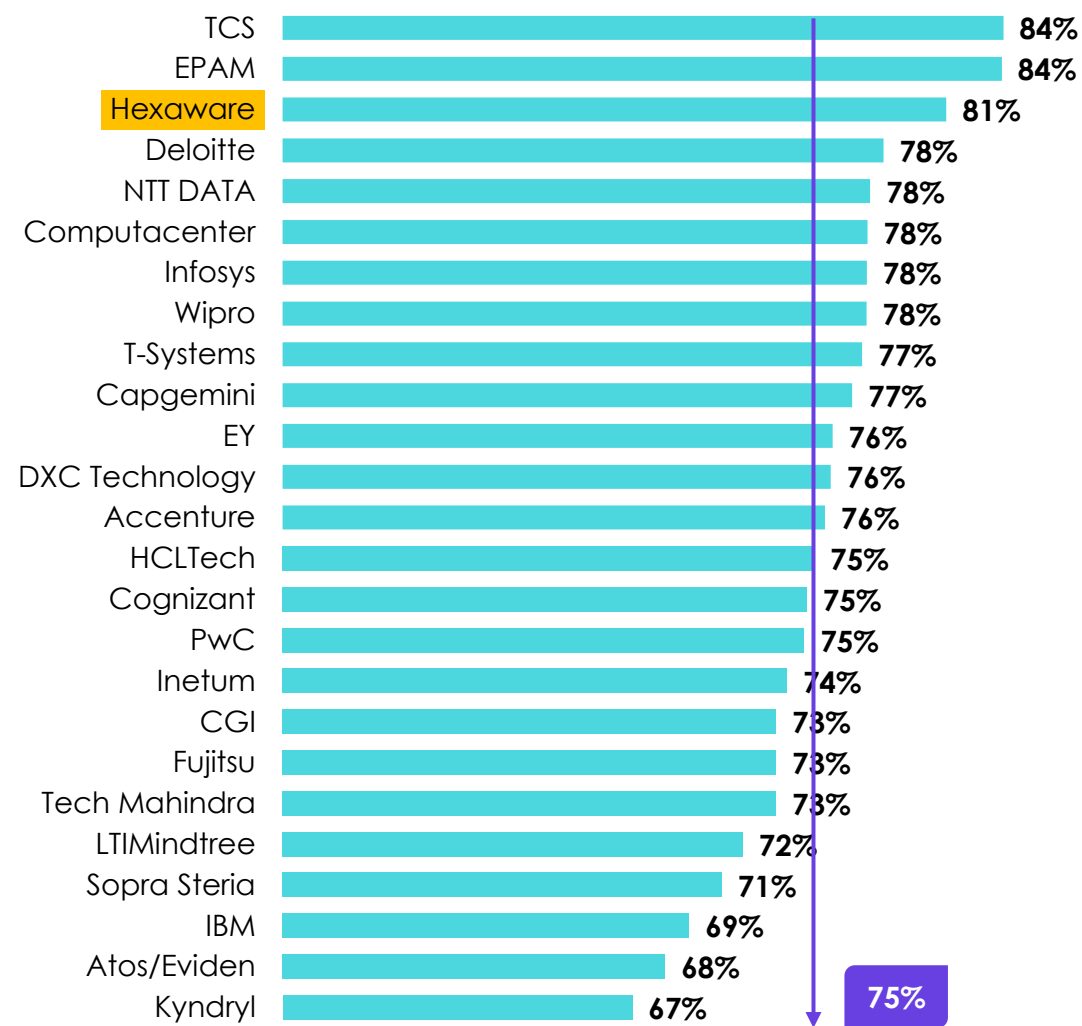
Exceptional performers
Strong performers

03
General satisfaction

2024/2025



2023/2024

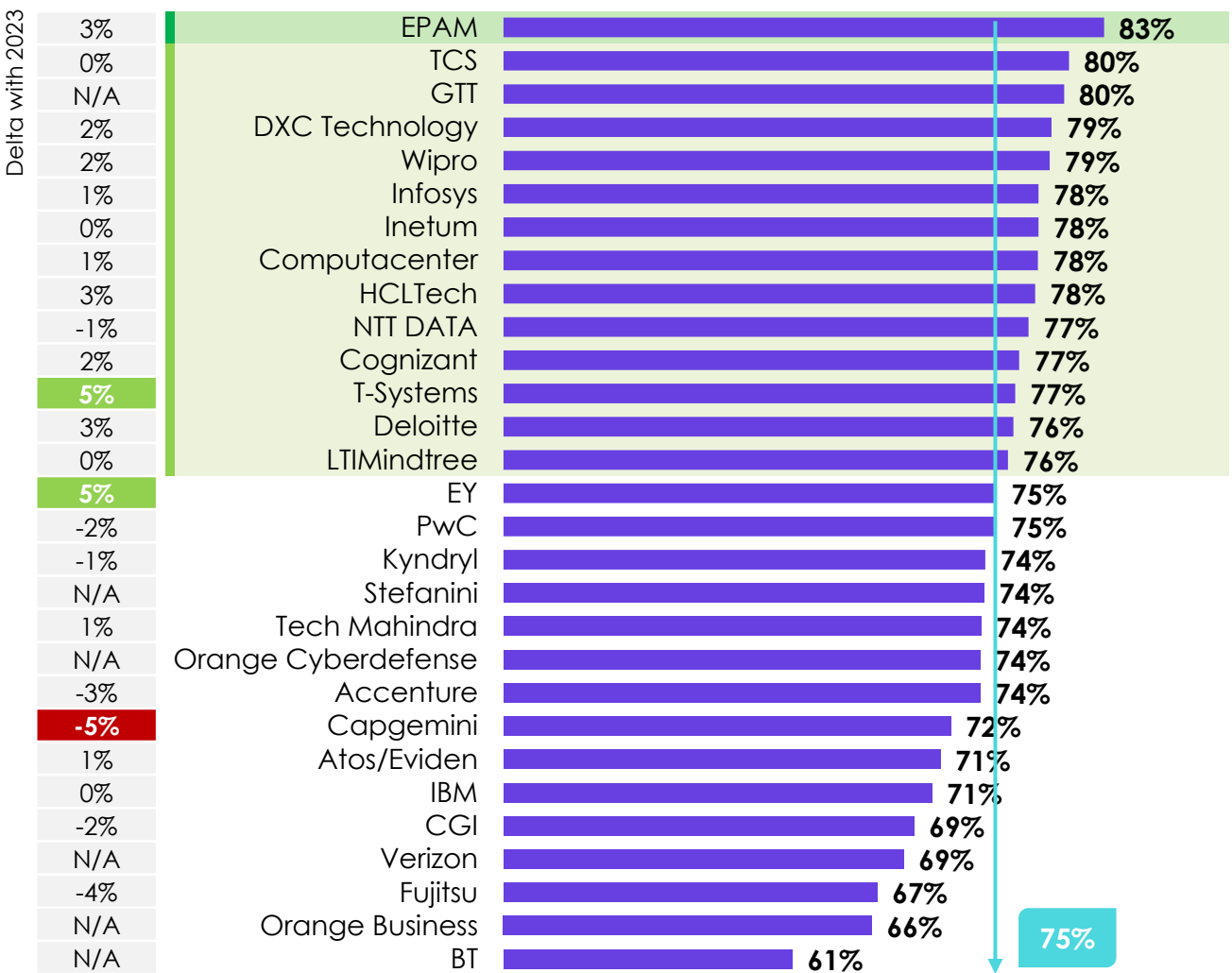


General satisfaction with service providers: Manufacturing/Chemicals, Consumer Goods and Pharmaceuticals

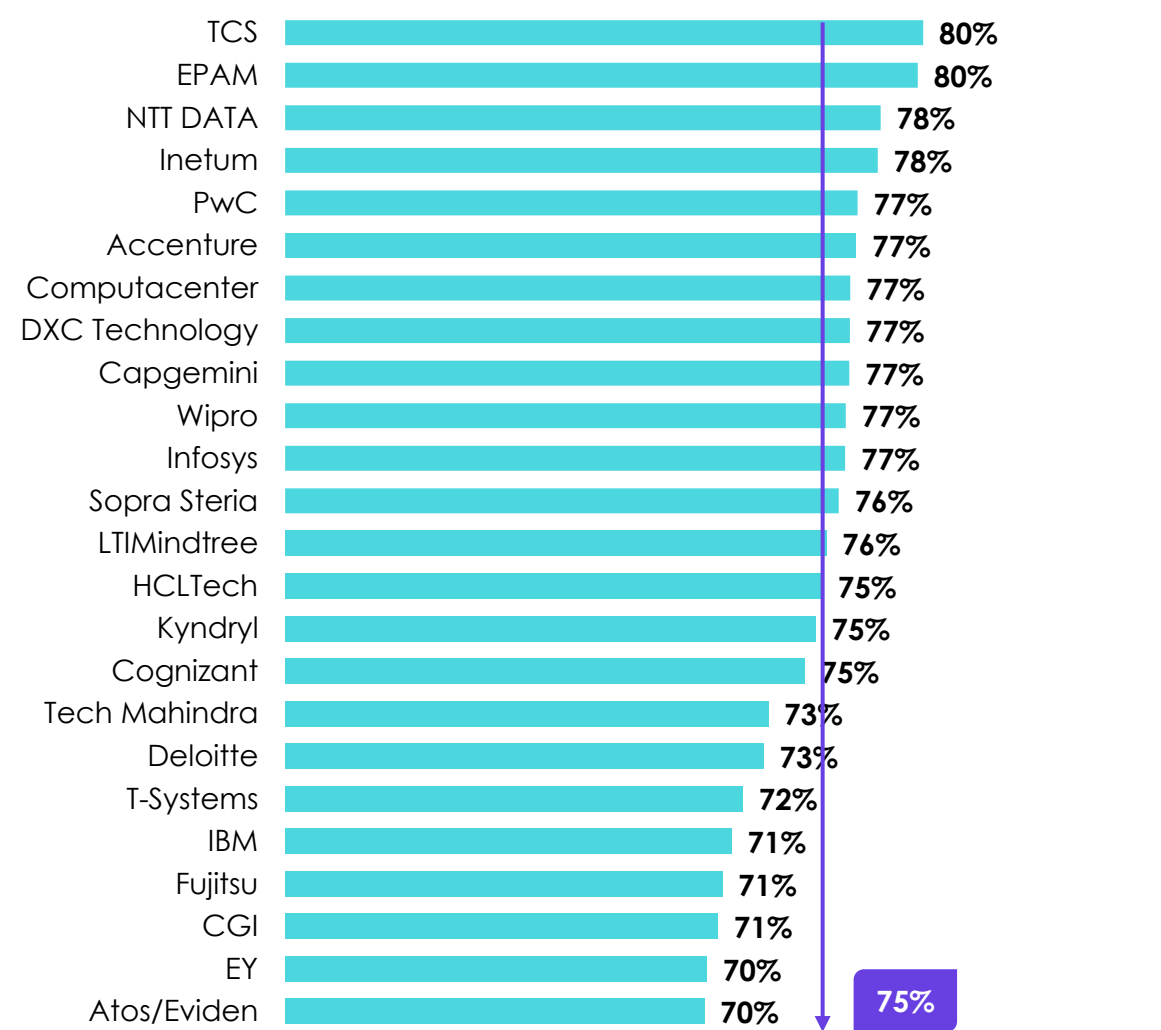
Exceptional performers
Strong performers

03
General satisfaction

2024/2025



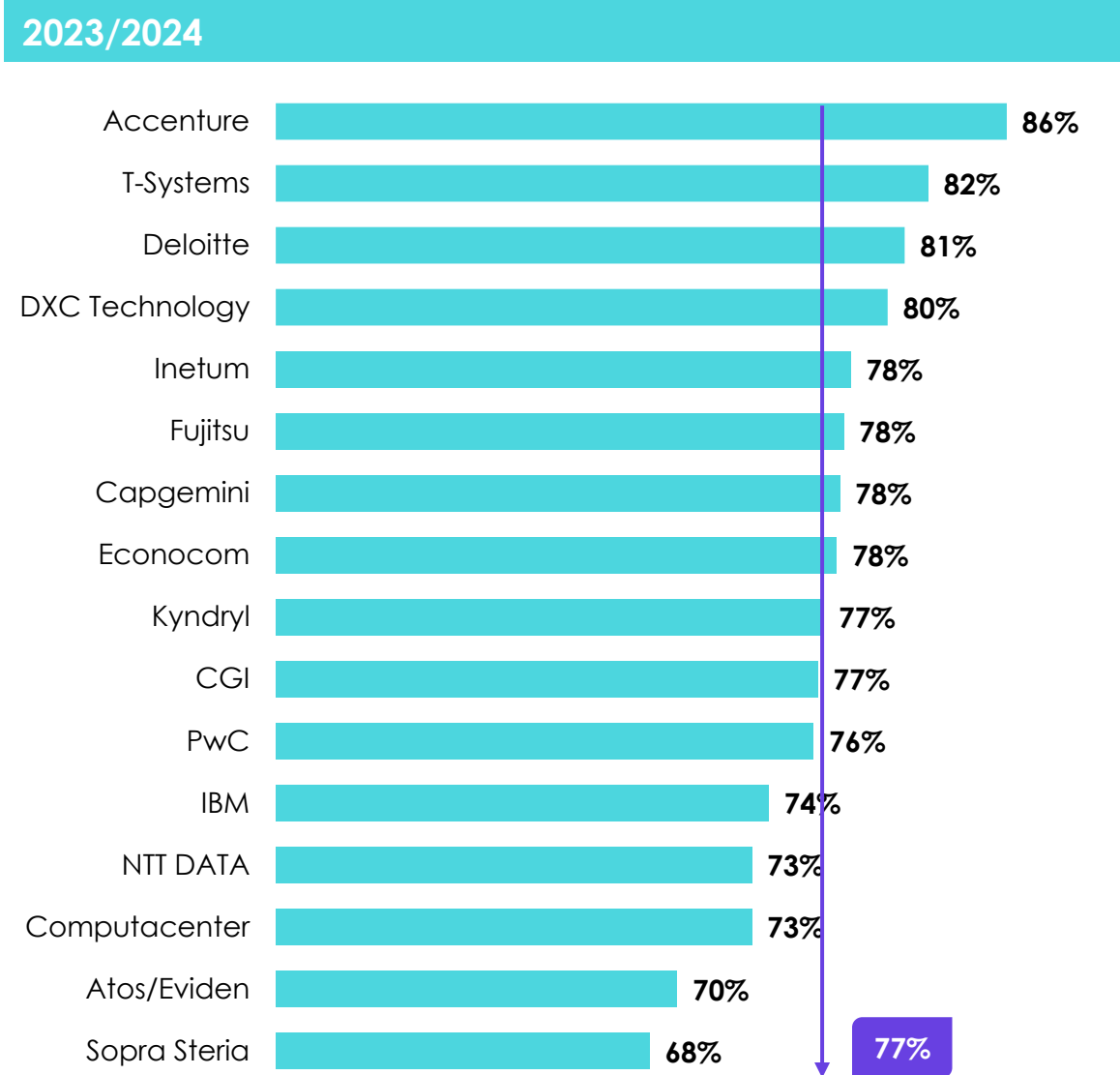
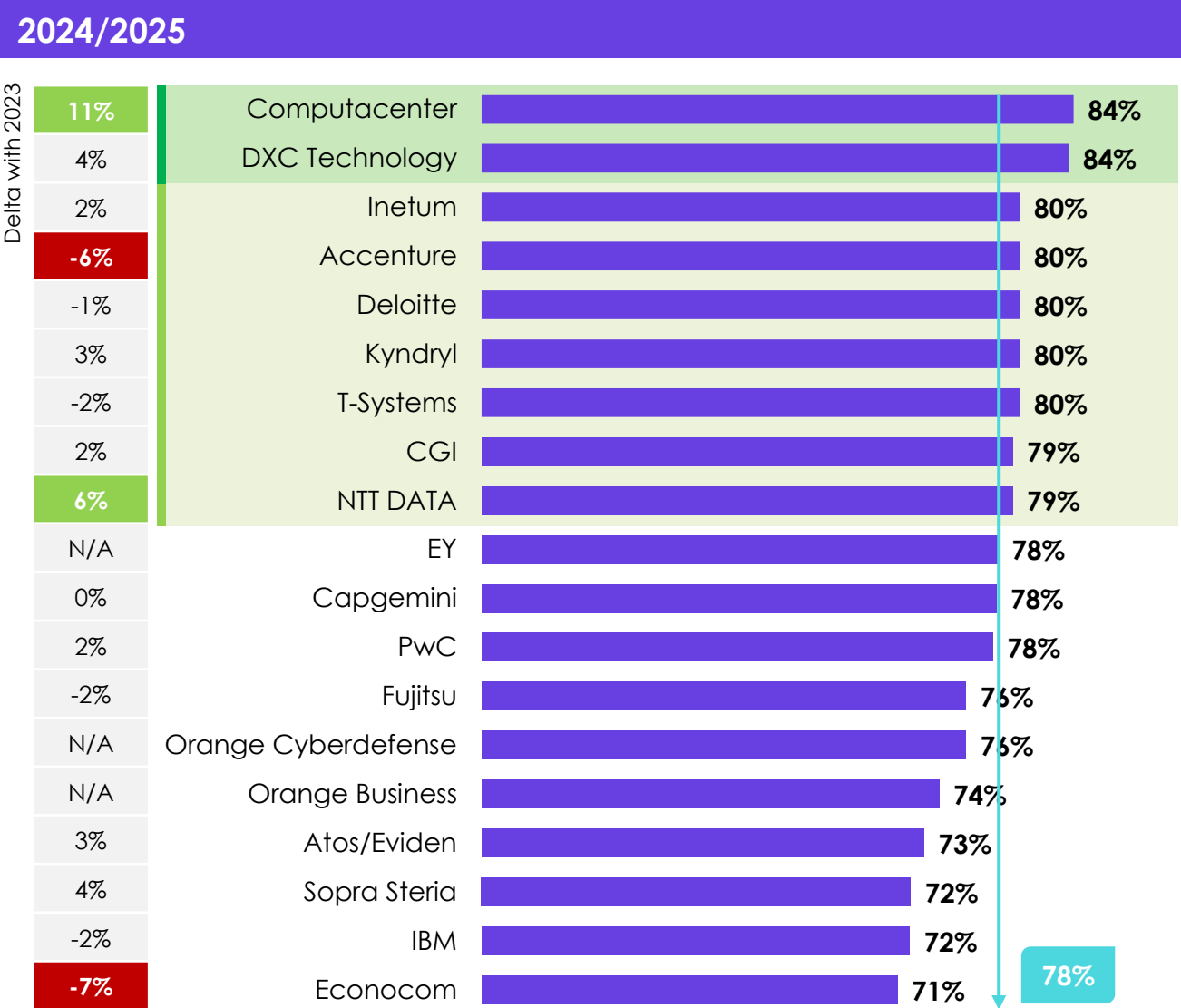
2023/2024



General satisfaction with service providers: Public Sector

Exceptional performers
Strong performers

03
General satisfaction

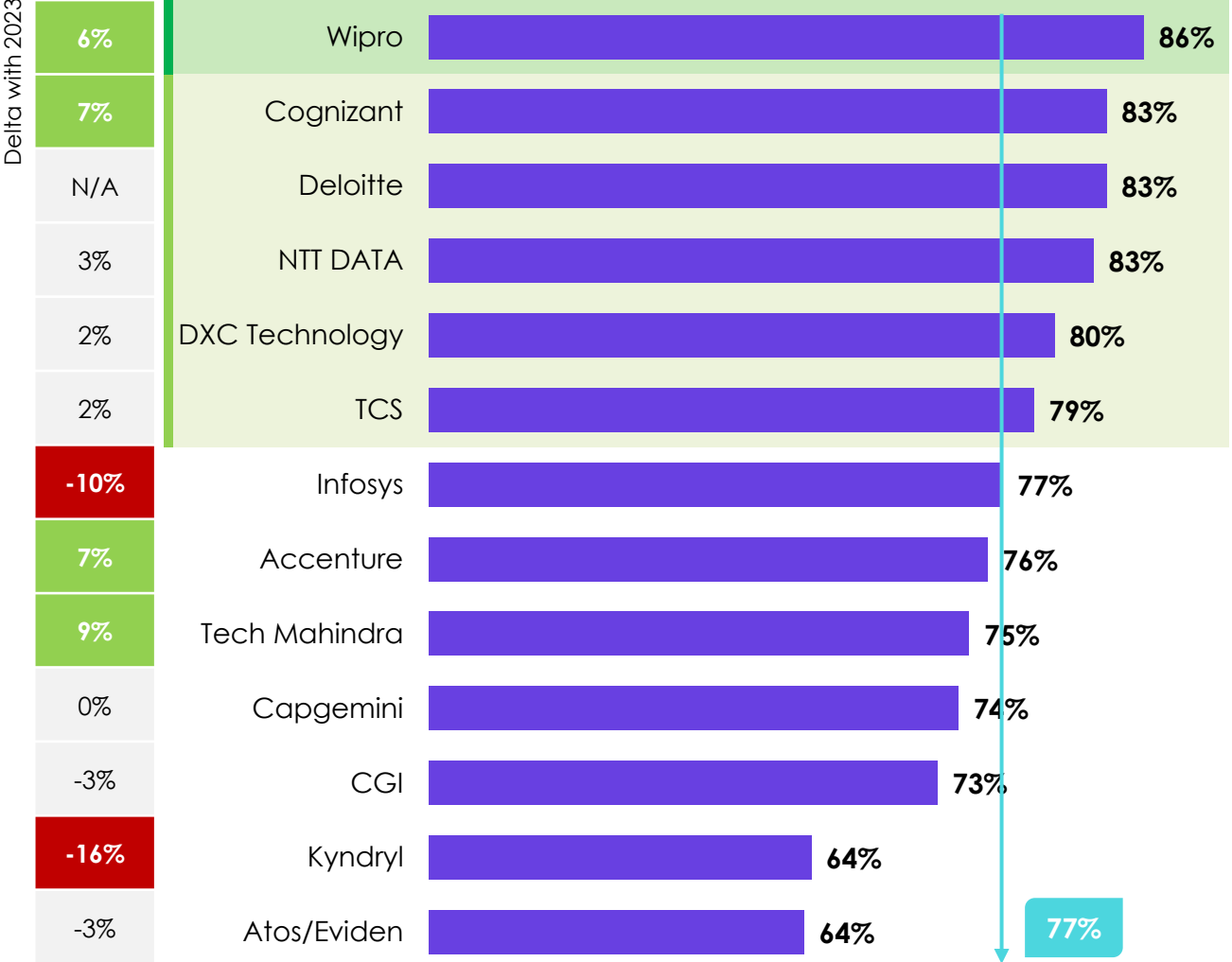


General satisfaction with service providers: Technology & Telecommunications

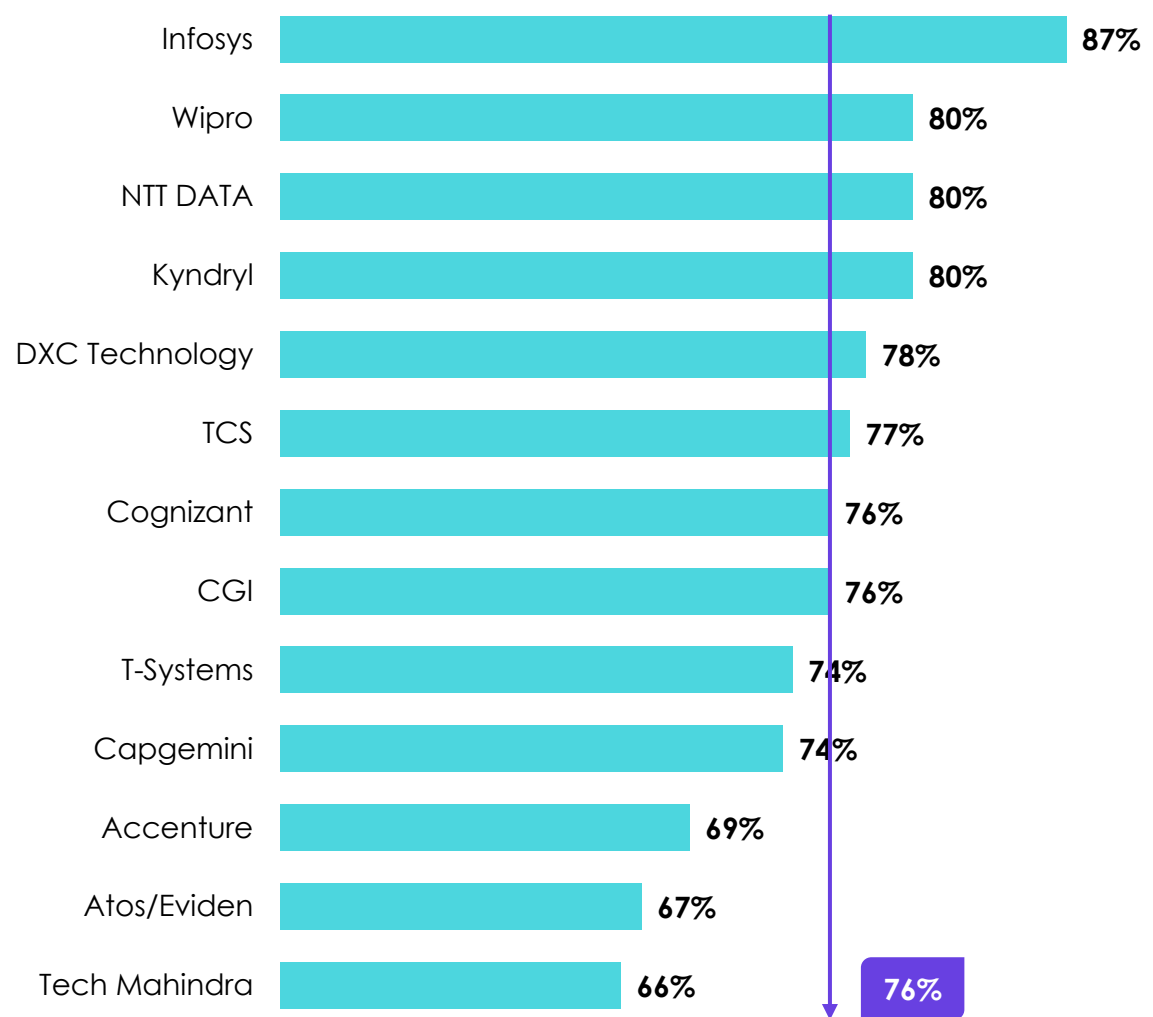
Exceptional performers
Strong performers

03
General satisfaction

2024/2025



2023/2024

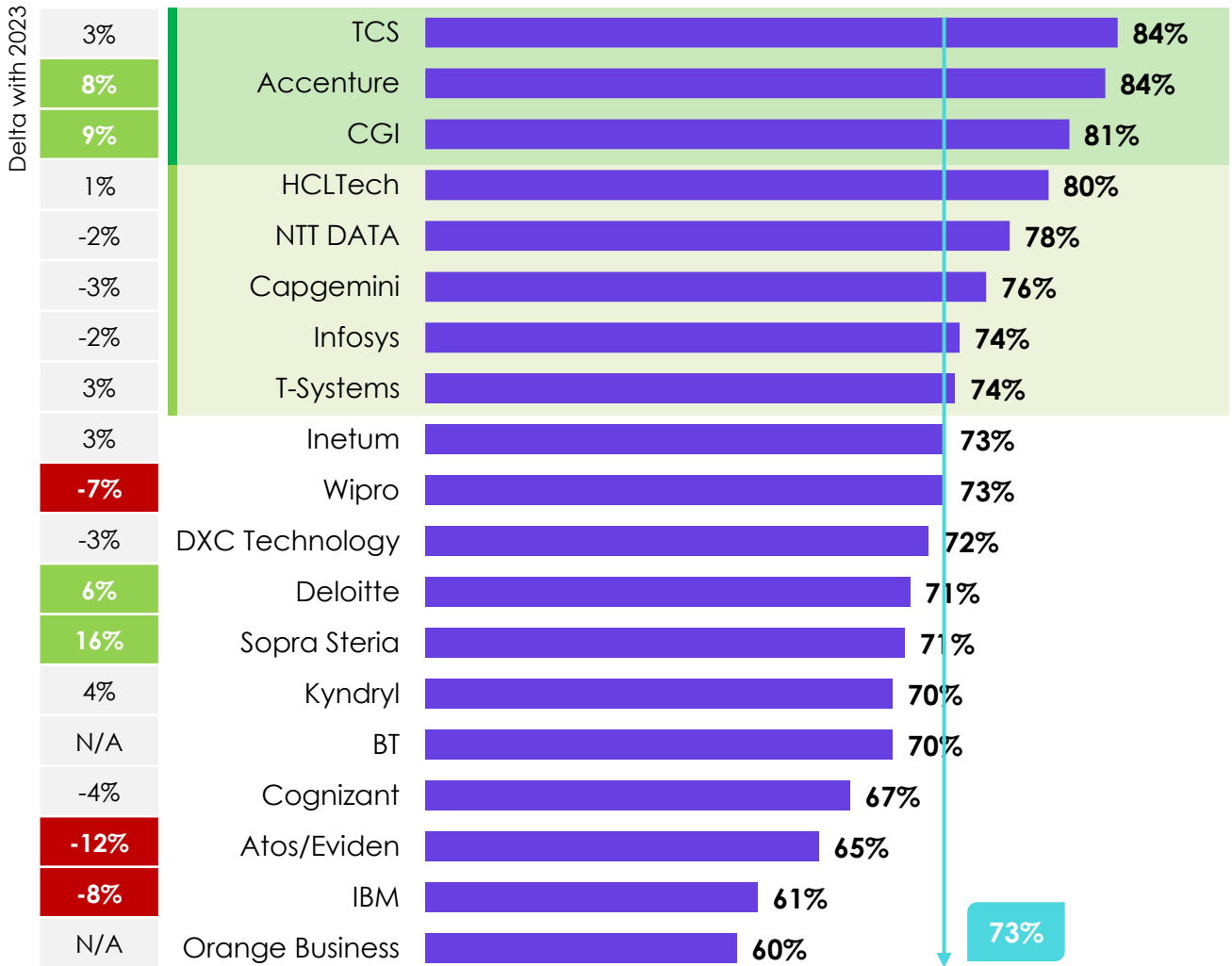


General satisfaction with service providers: Transport & Logistics

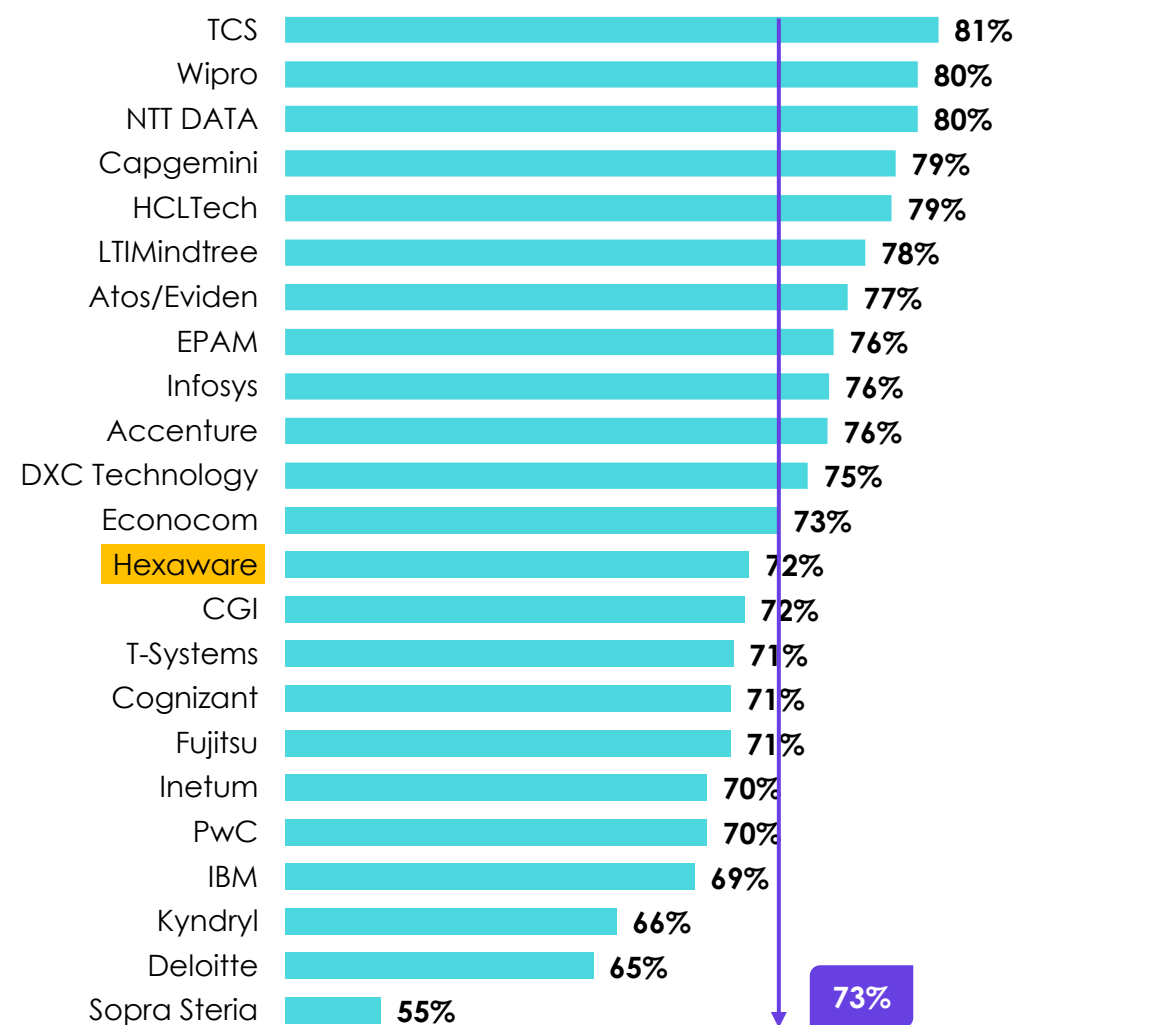
Exceptional performers
Strong performers

03
General satisfaction

2024/2025



2023/2024

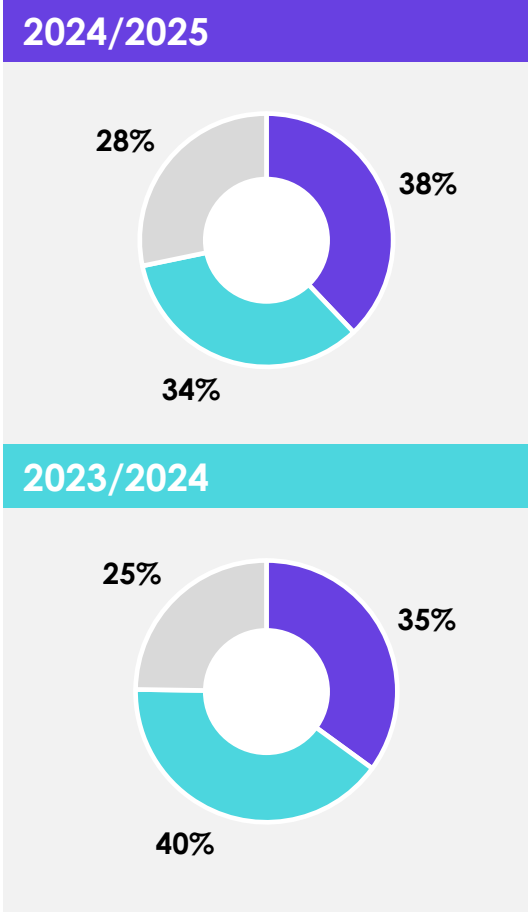
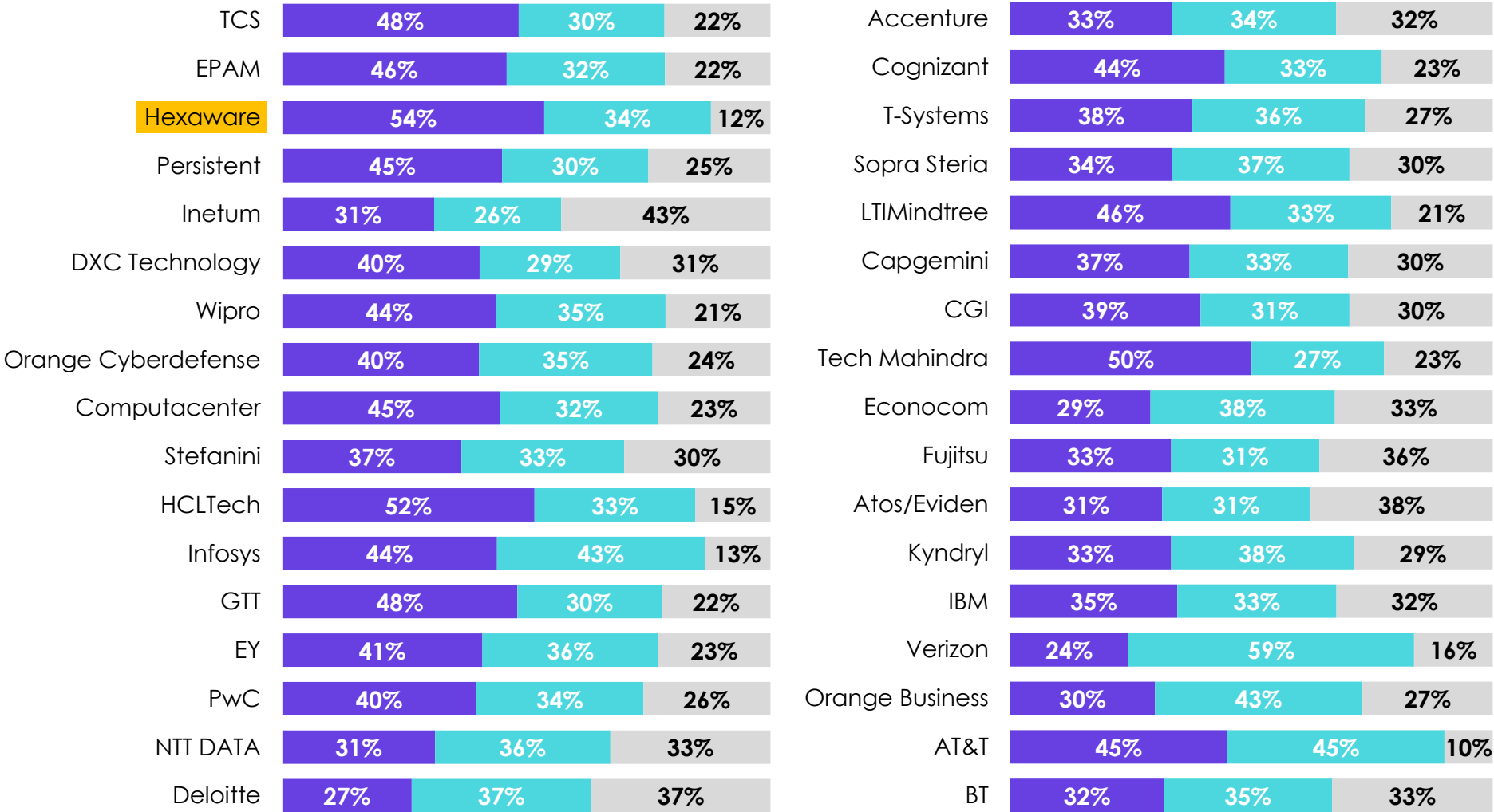


If you are working in the private sector, will you conduct the renewal process via negotiation with the existing provider or run a competitive process?

First, negotiate with the existing vendor

Directly run a competitive process

N/A - I'm not sure



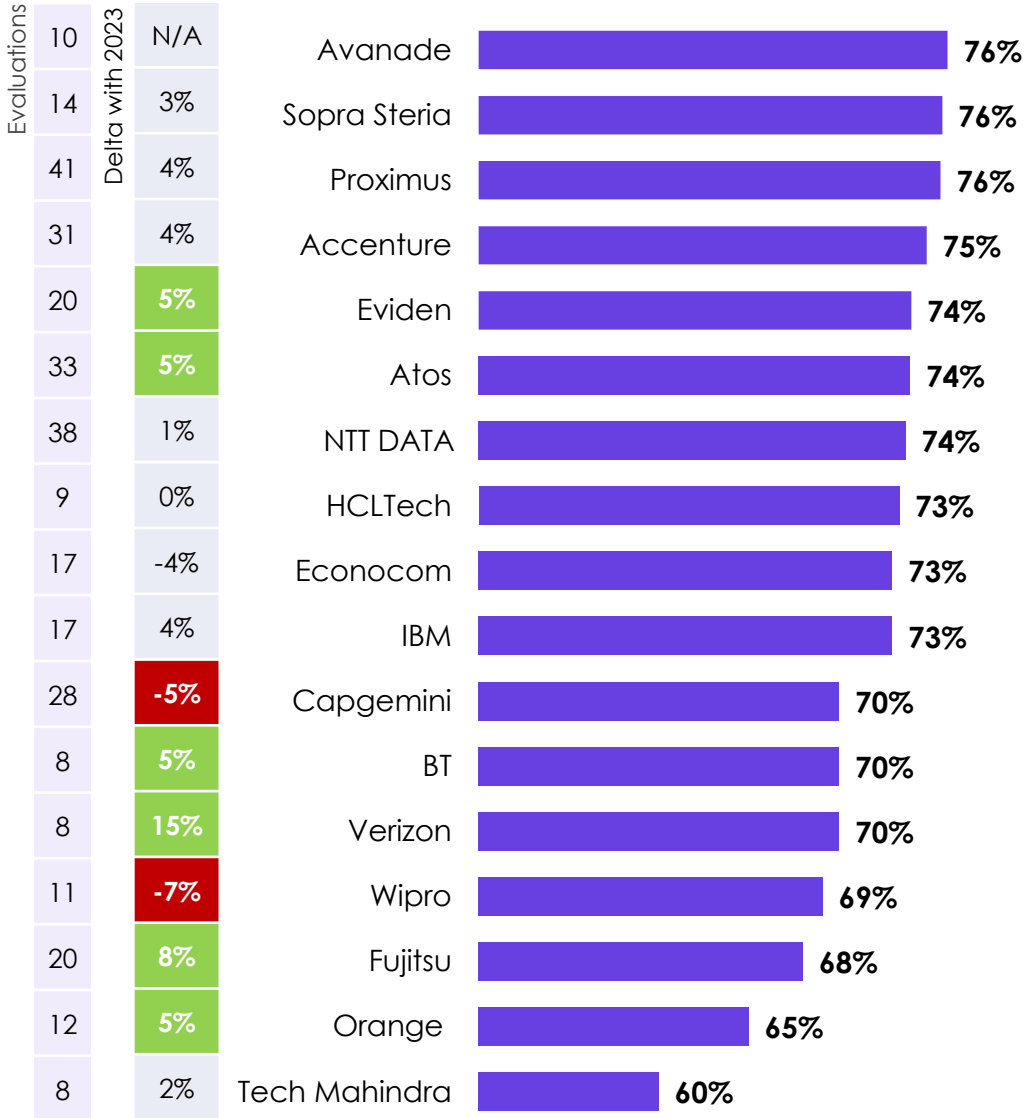
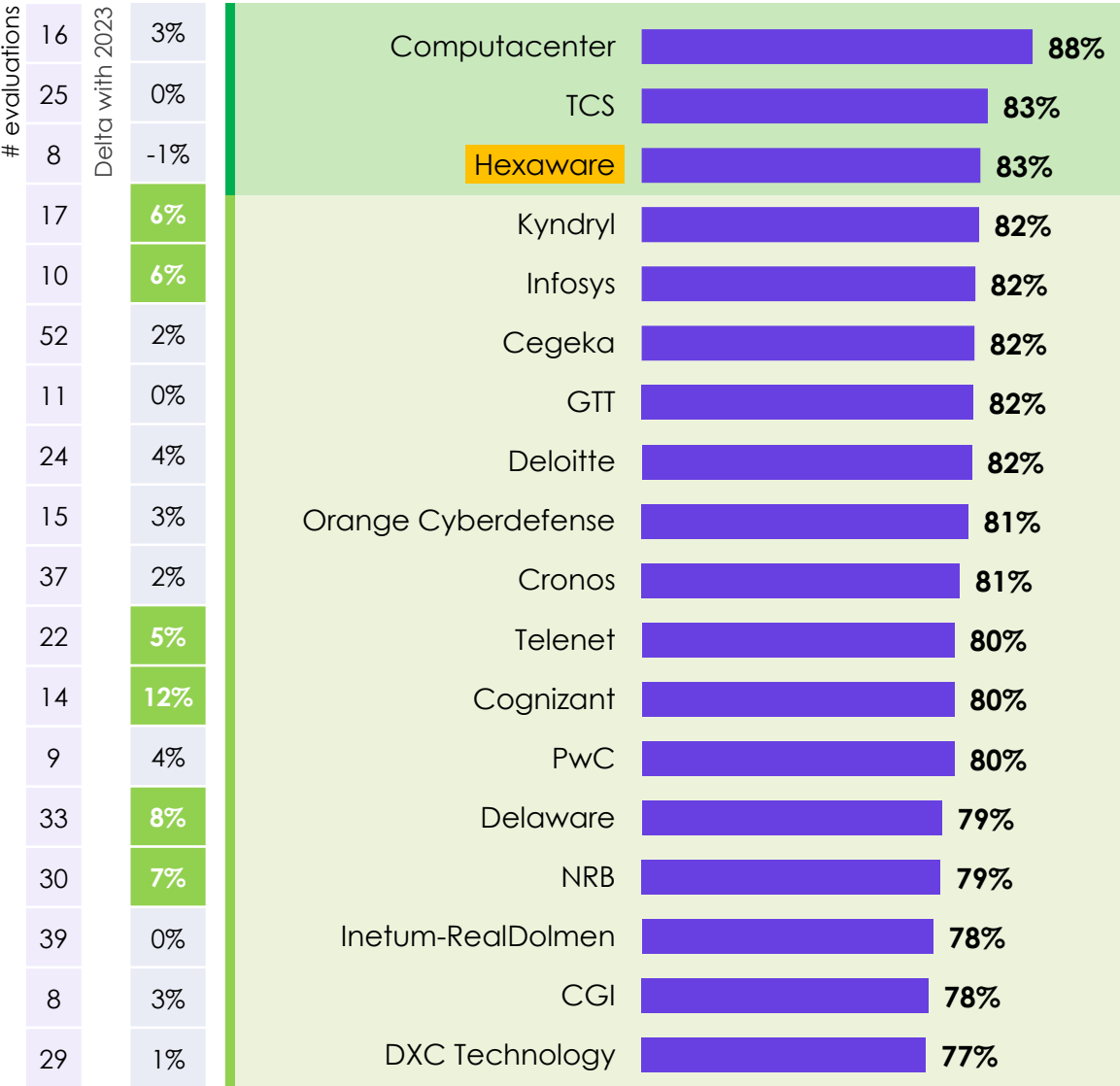


03

IT service provider performance

General satisfaction by country/region

General satisfaction with service providers: BeLux 2024

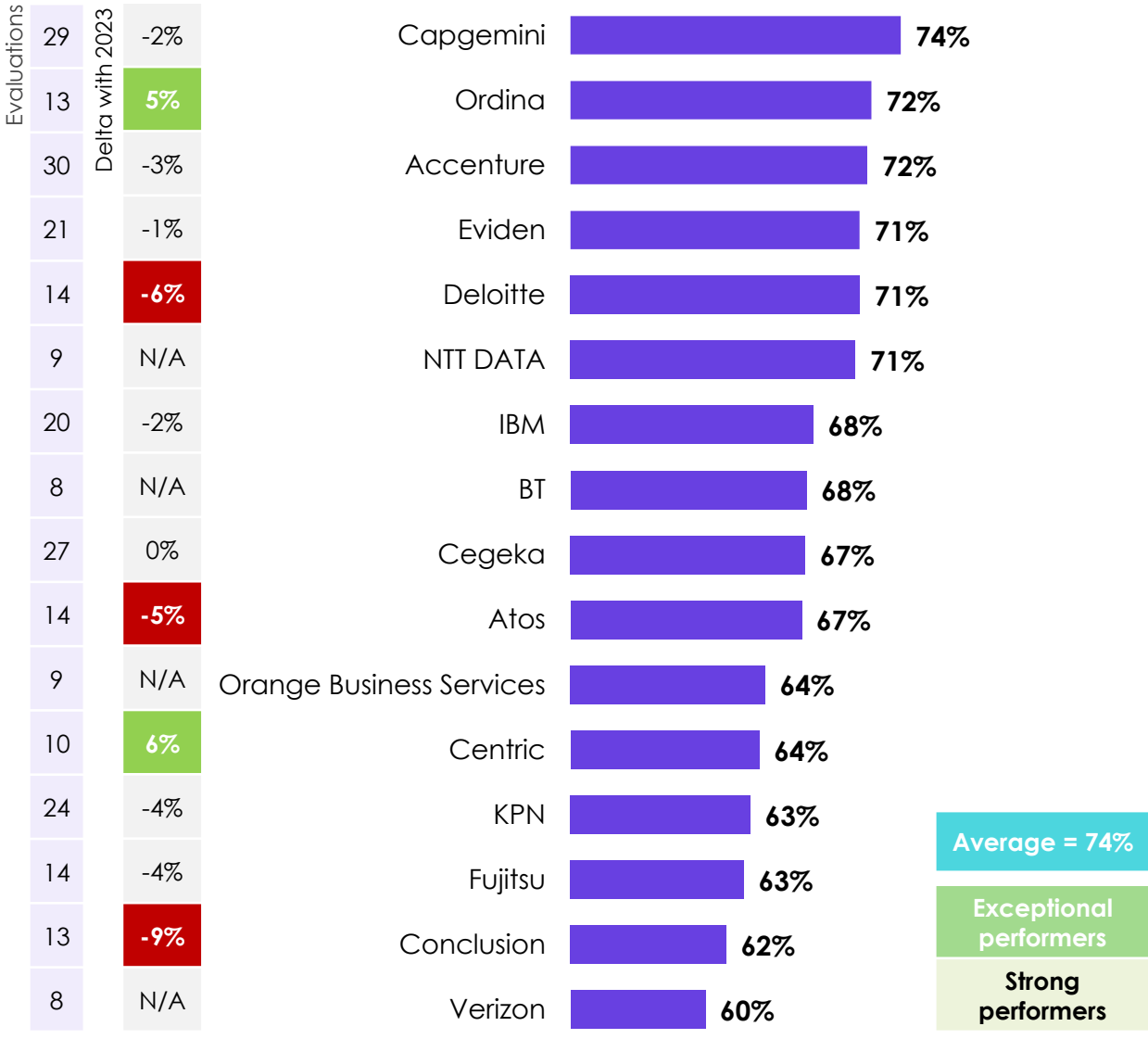
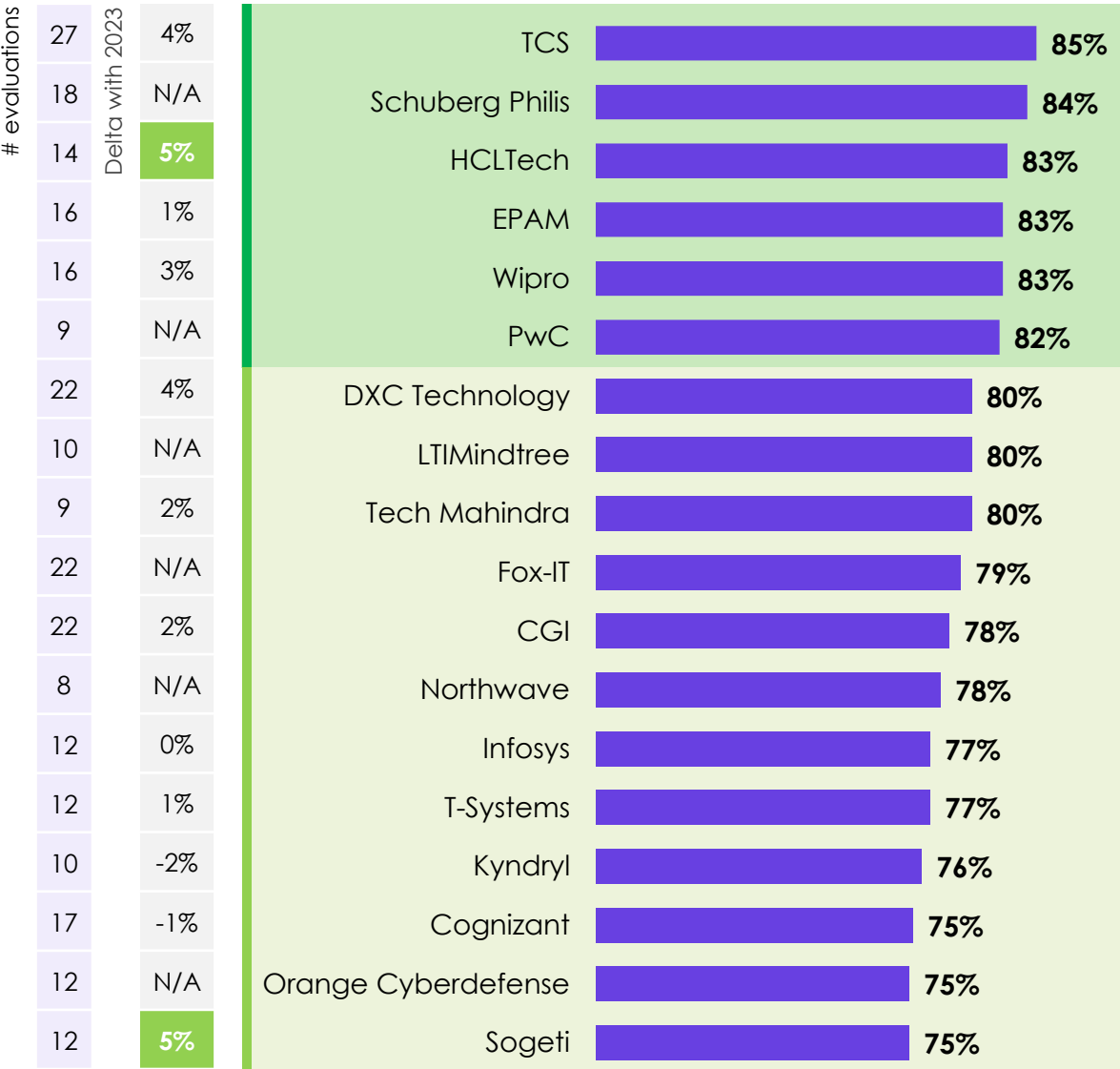


Average = 76%

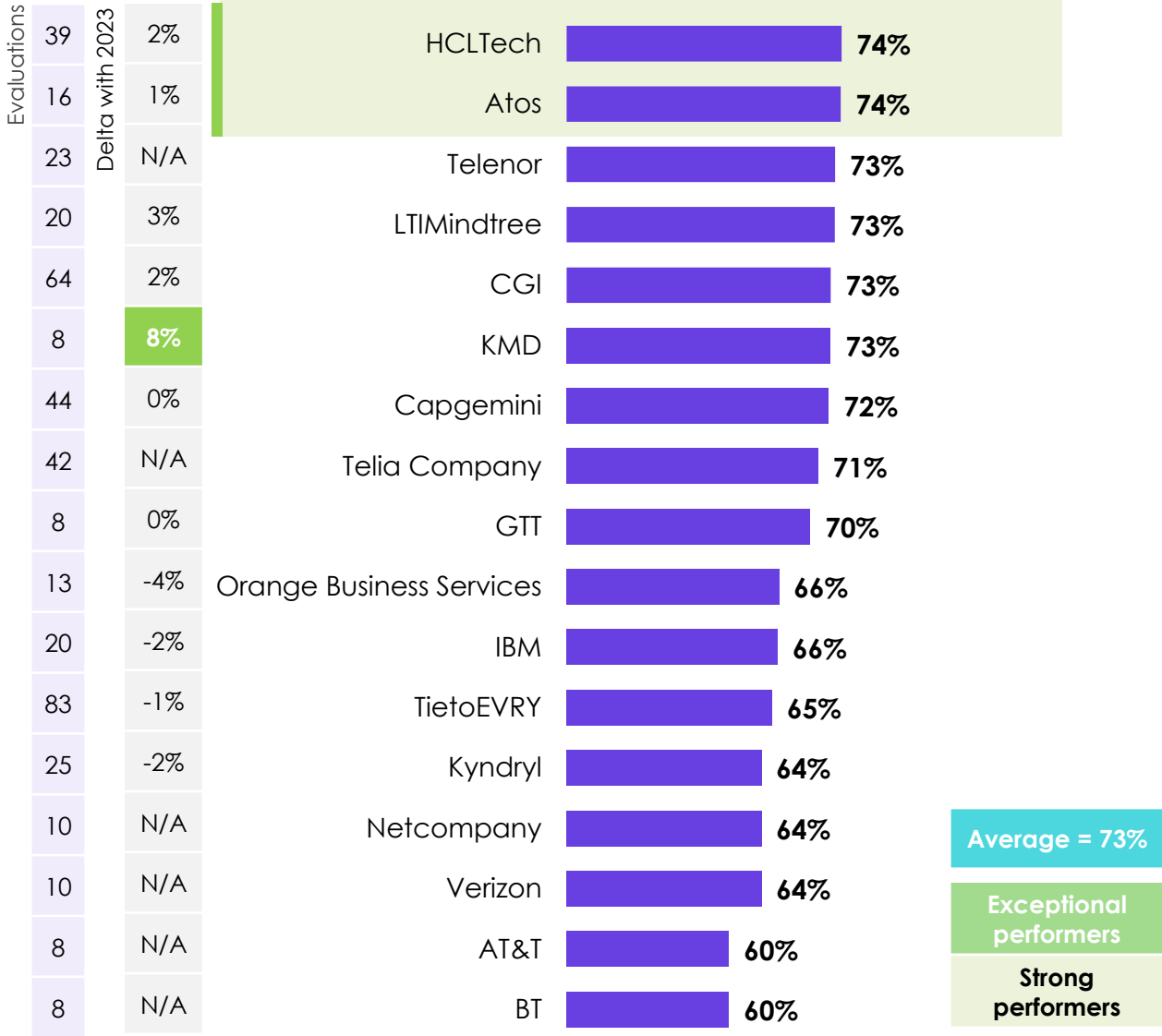
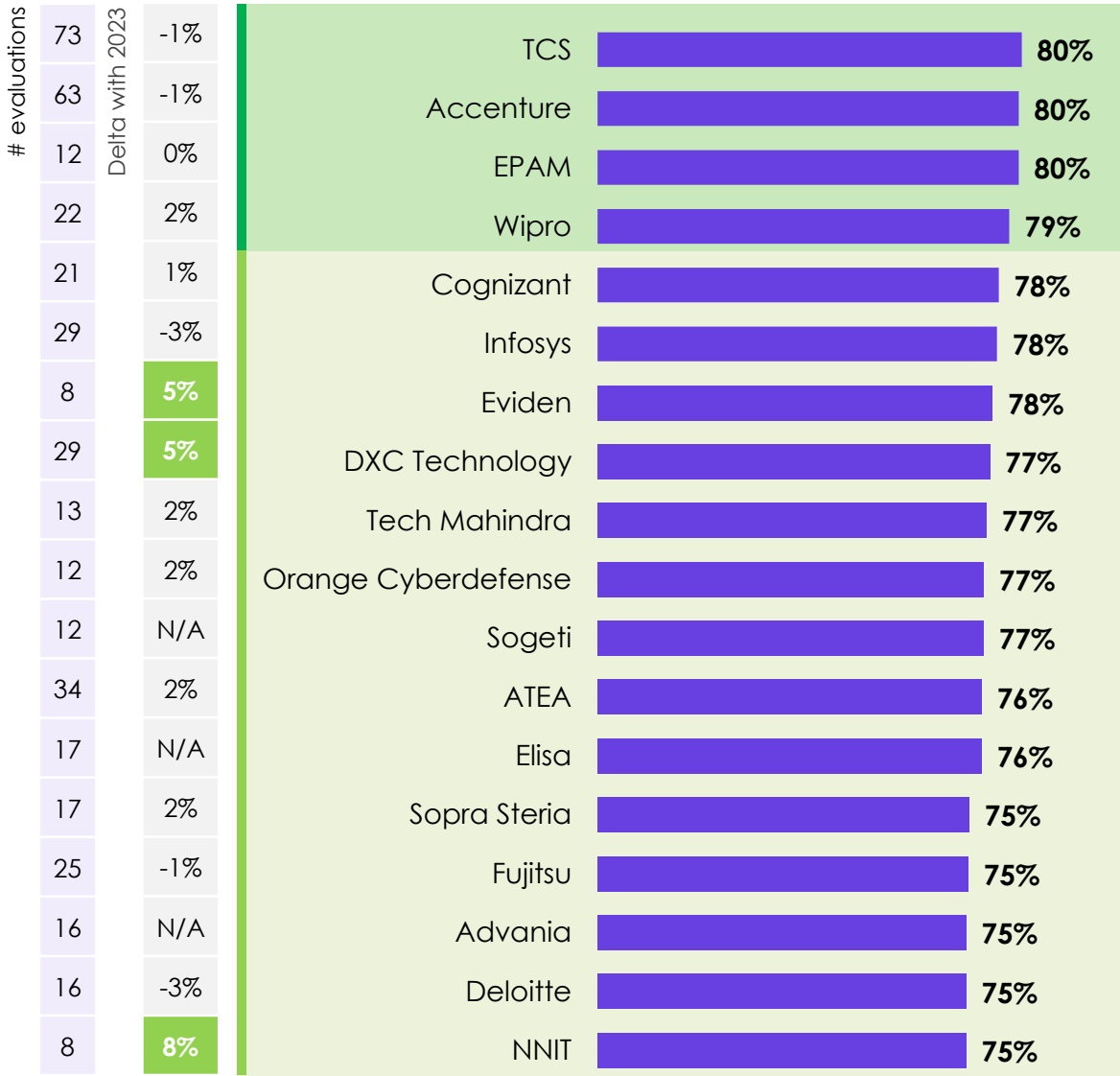
Exceptional performers

Strong performers

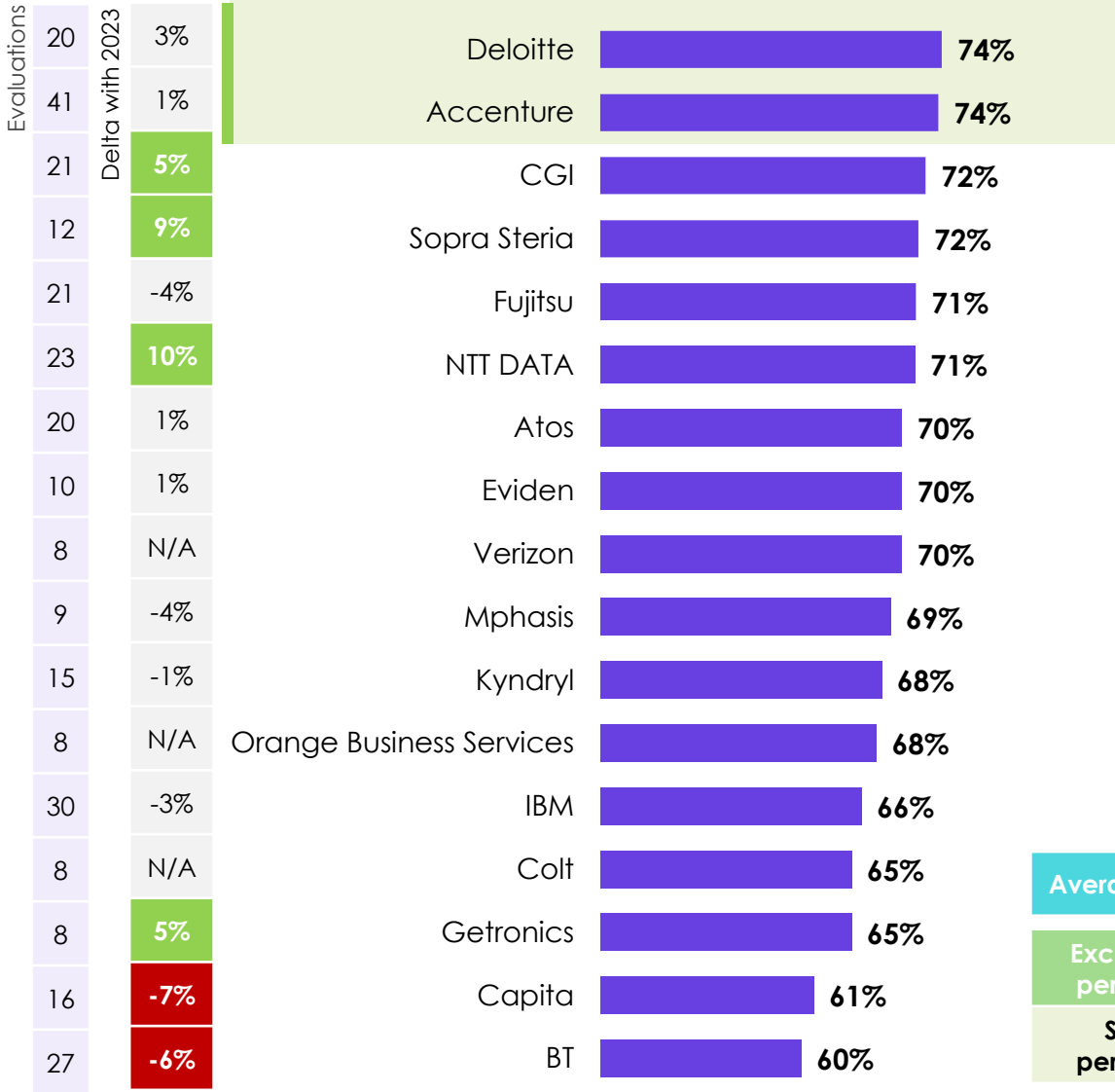
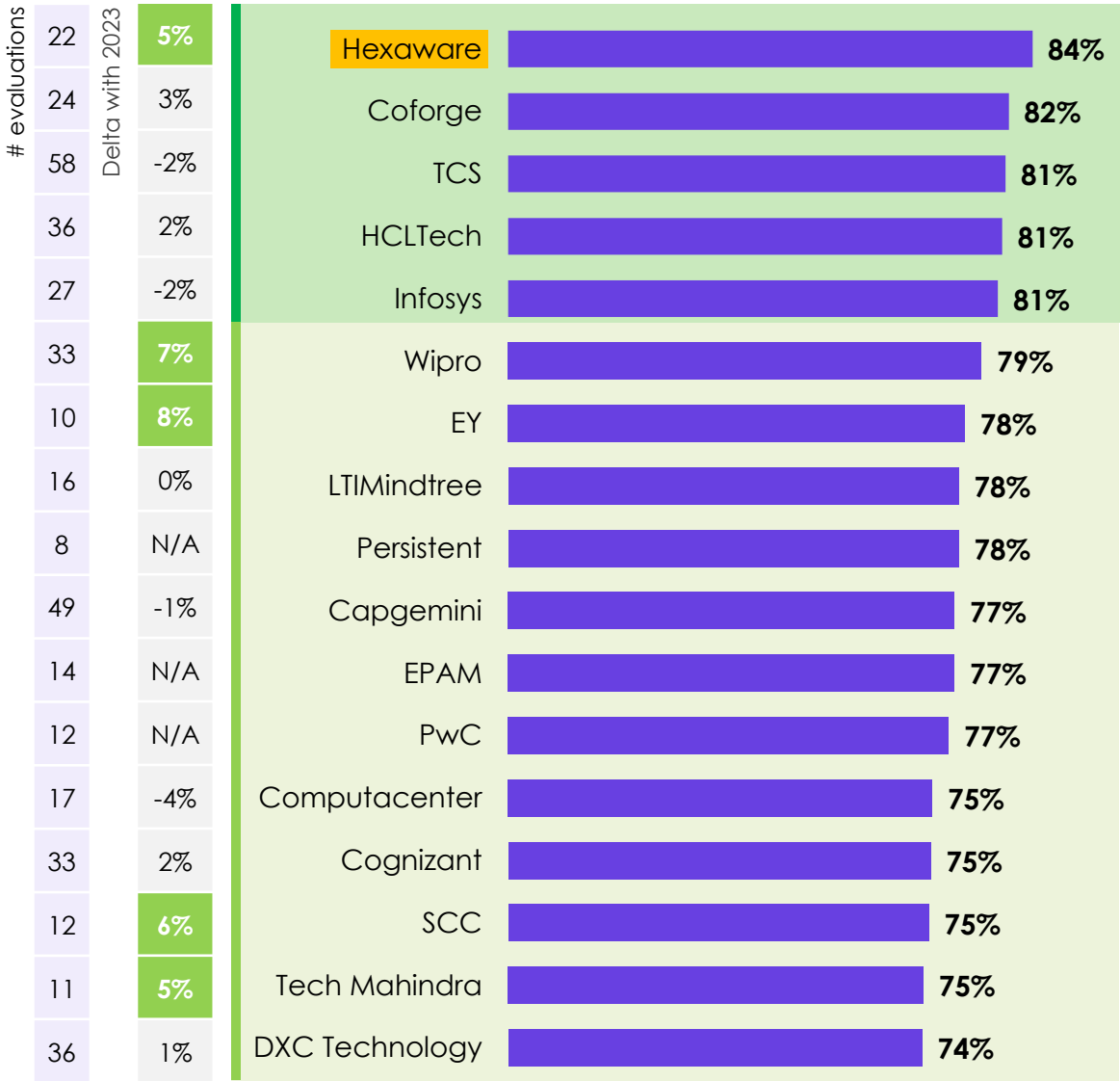
General satisfaction with service providers: Netherlands 2024



General satisfaction with service providers: Nordics 2024



General satisfaction with service providers: United Kingdom 2024

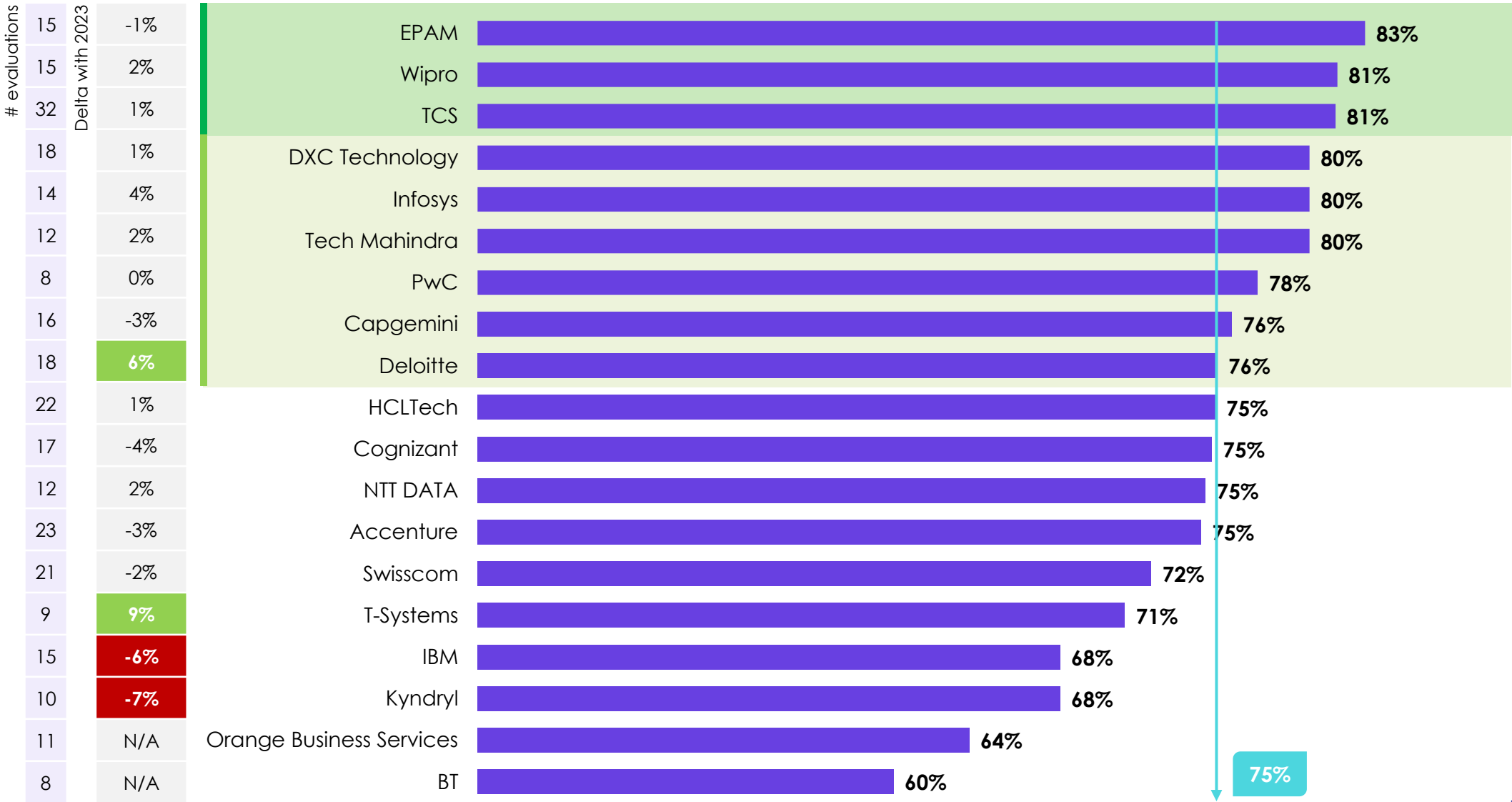


Average = 73%

Exceptional performers

Strong performers

General satisfaction with service providers: Switzerland 2024



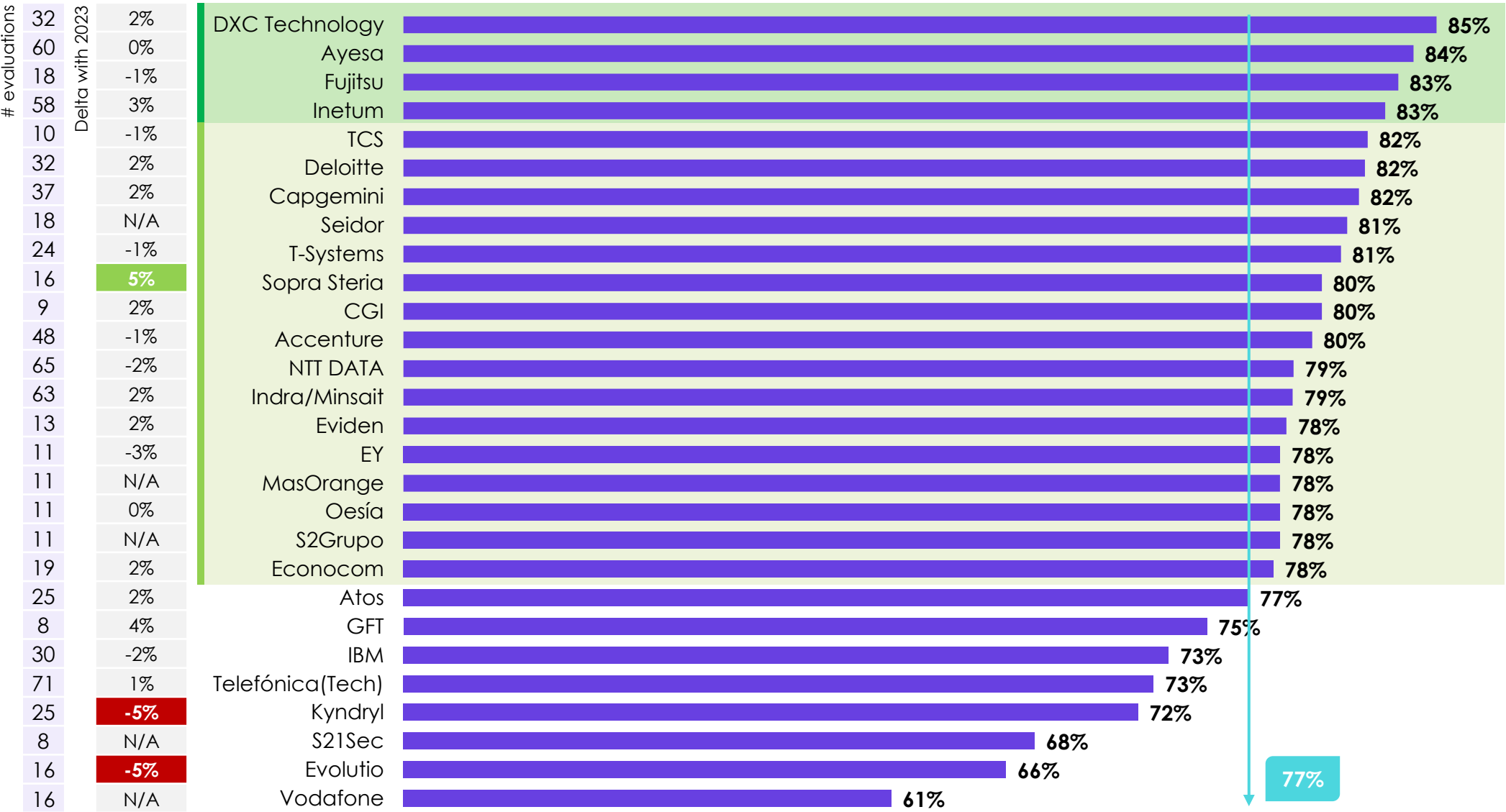
Exceptional performers

Strong performers

KEY TO SCORES

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

General satisfaction with service providers: Spain 2024



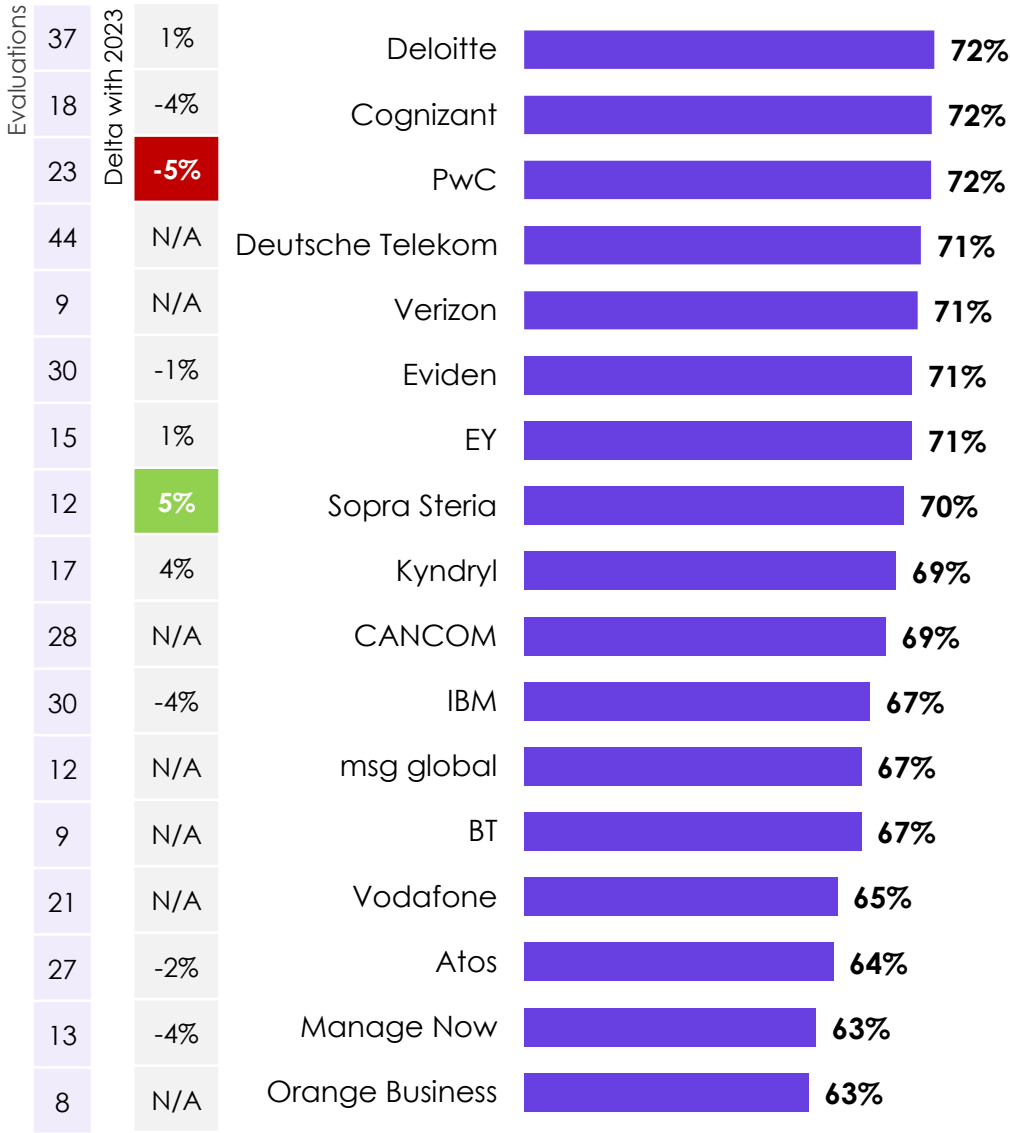
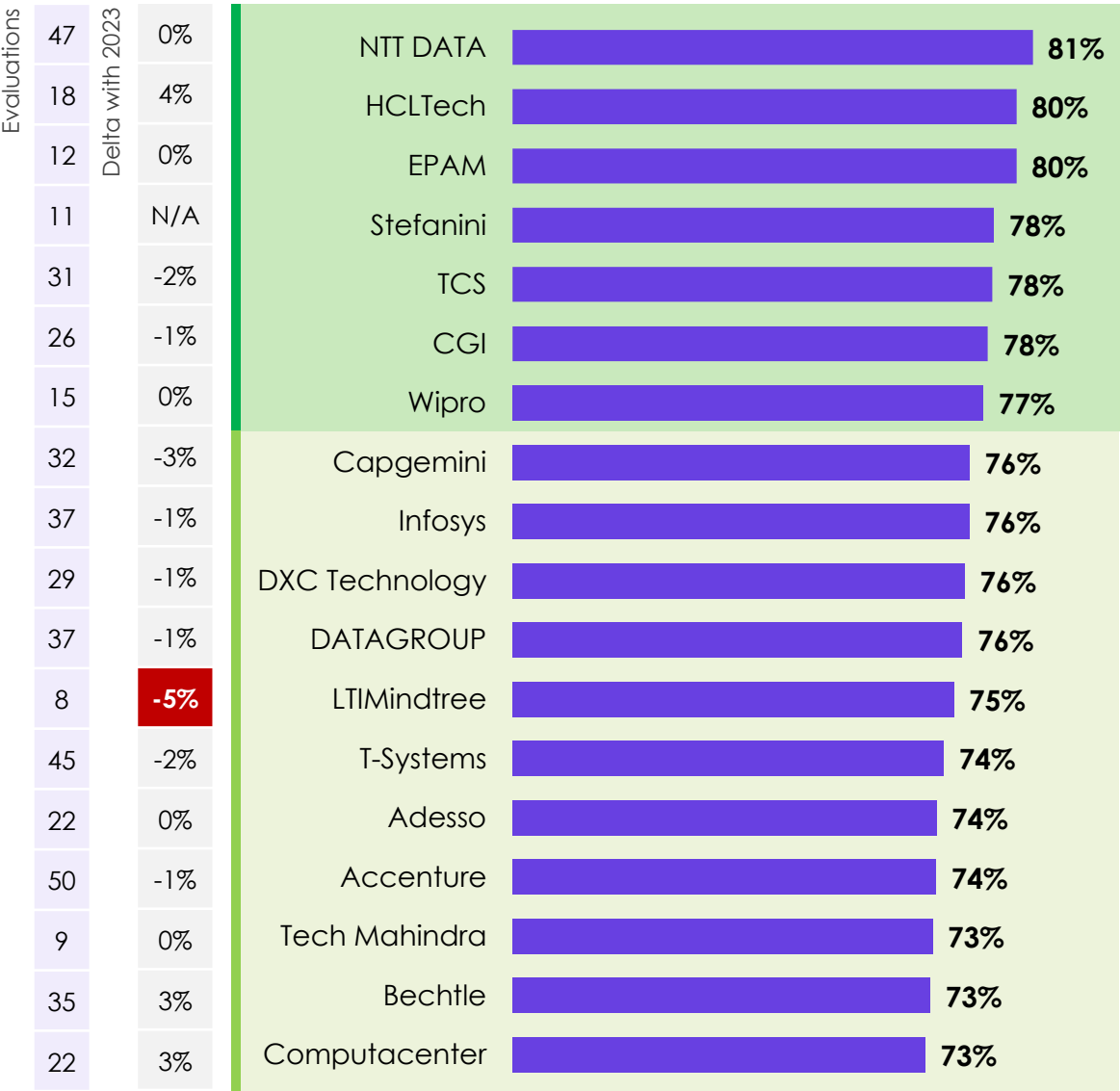
Exceptional performers

Strong performers

KEY TO SCORES

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

General satisfaction with service providers: Germany 2024

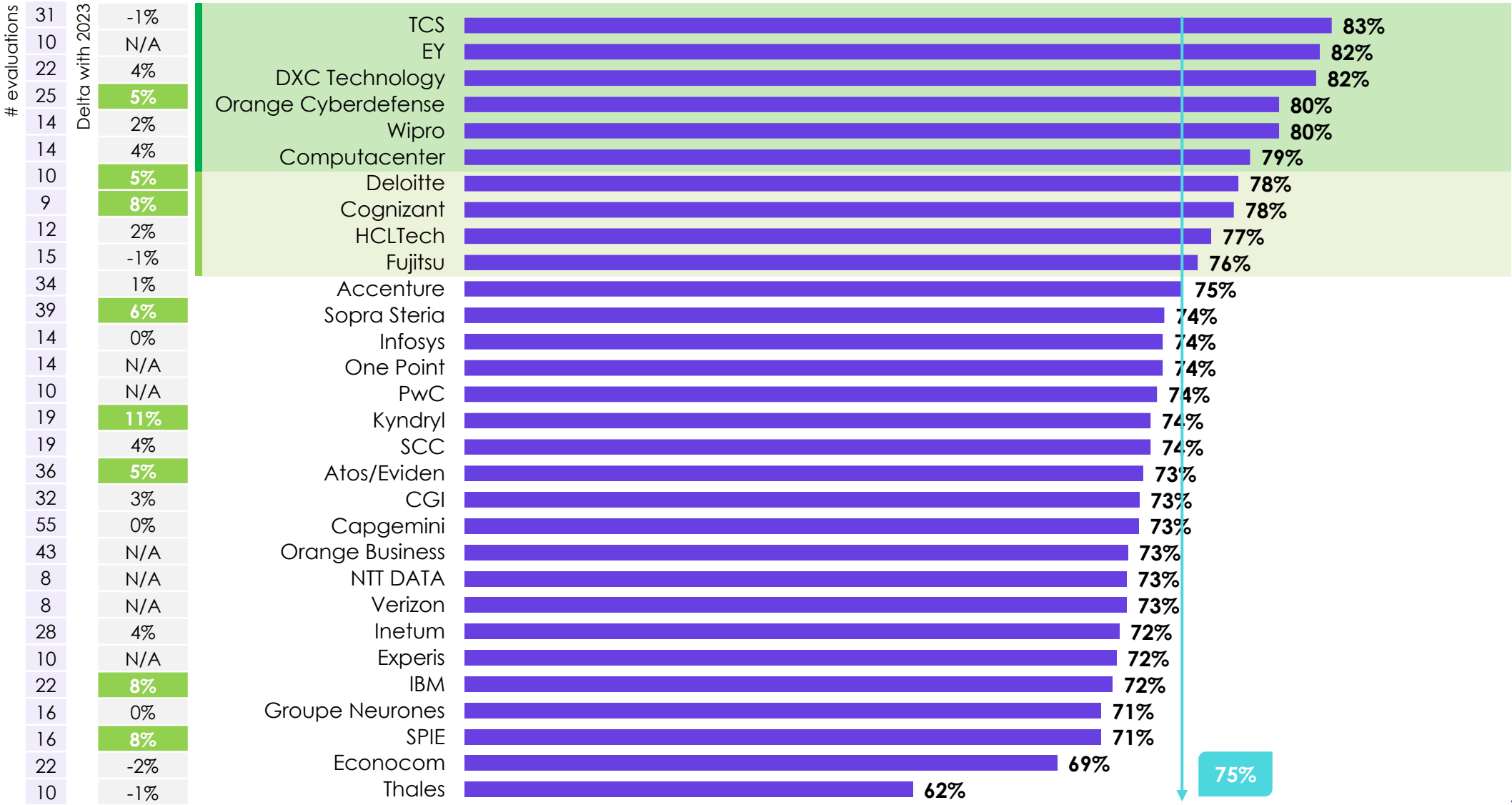


Average = 72%

Exceptional performers

Strong performers

General satisfaction with service providers: France 2024



Exceptional performers

Strong performers

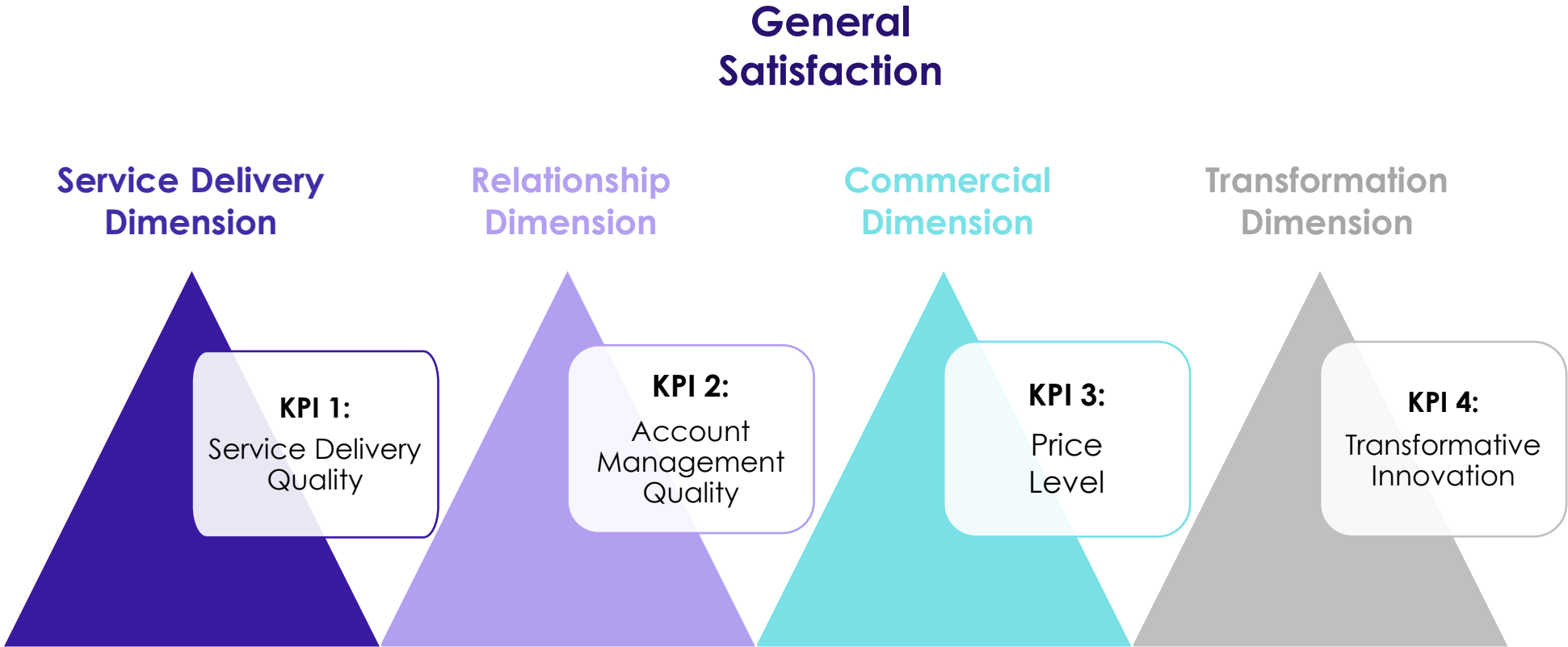
KEY TO SCORES

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



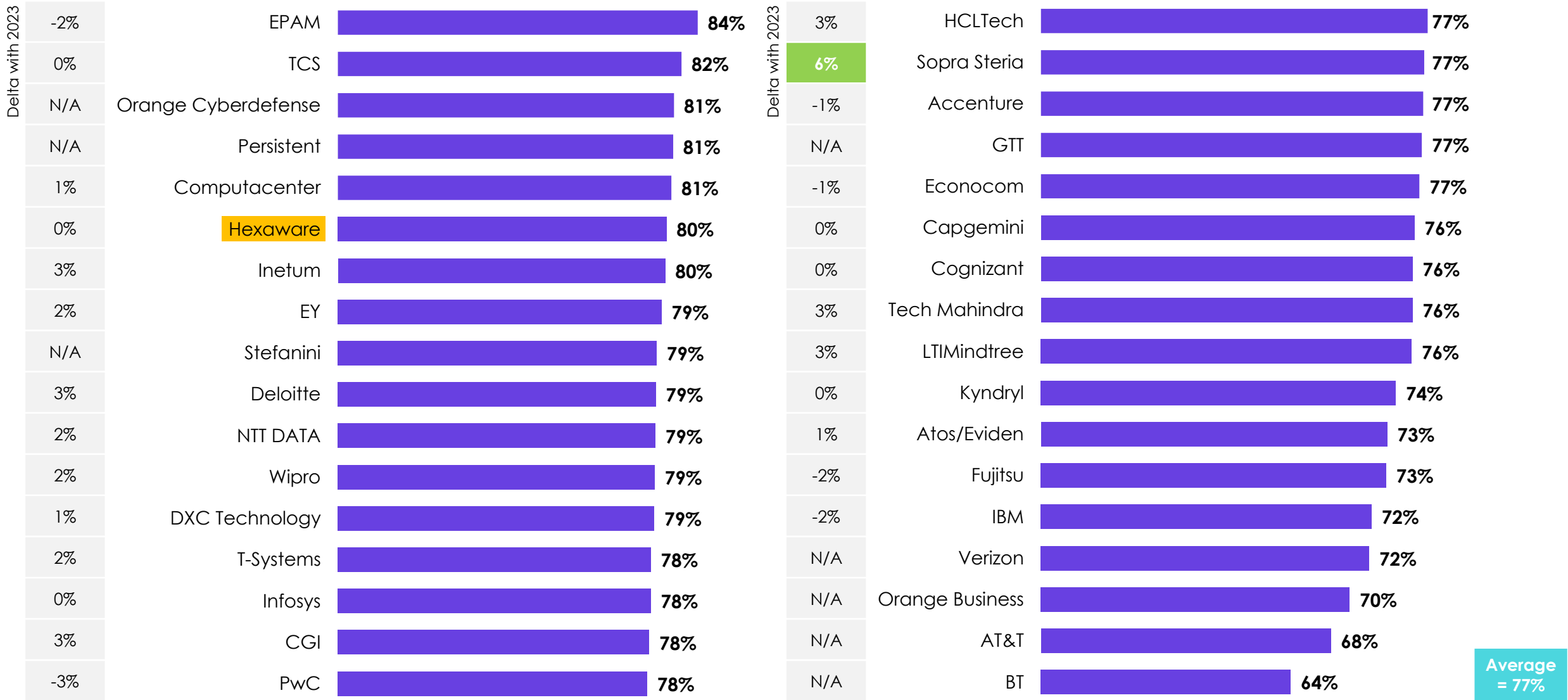
03

IT service provider performance Key Performance Indicators (KPIs)



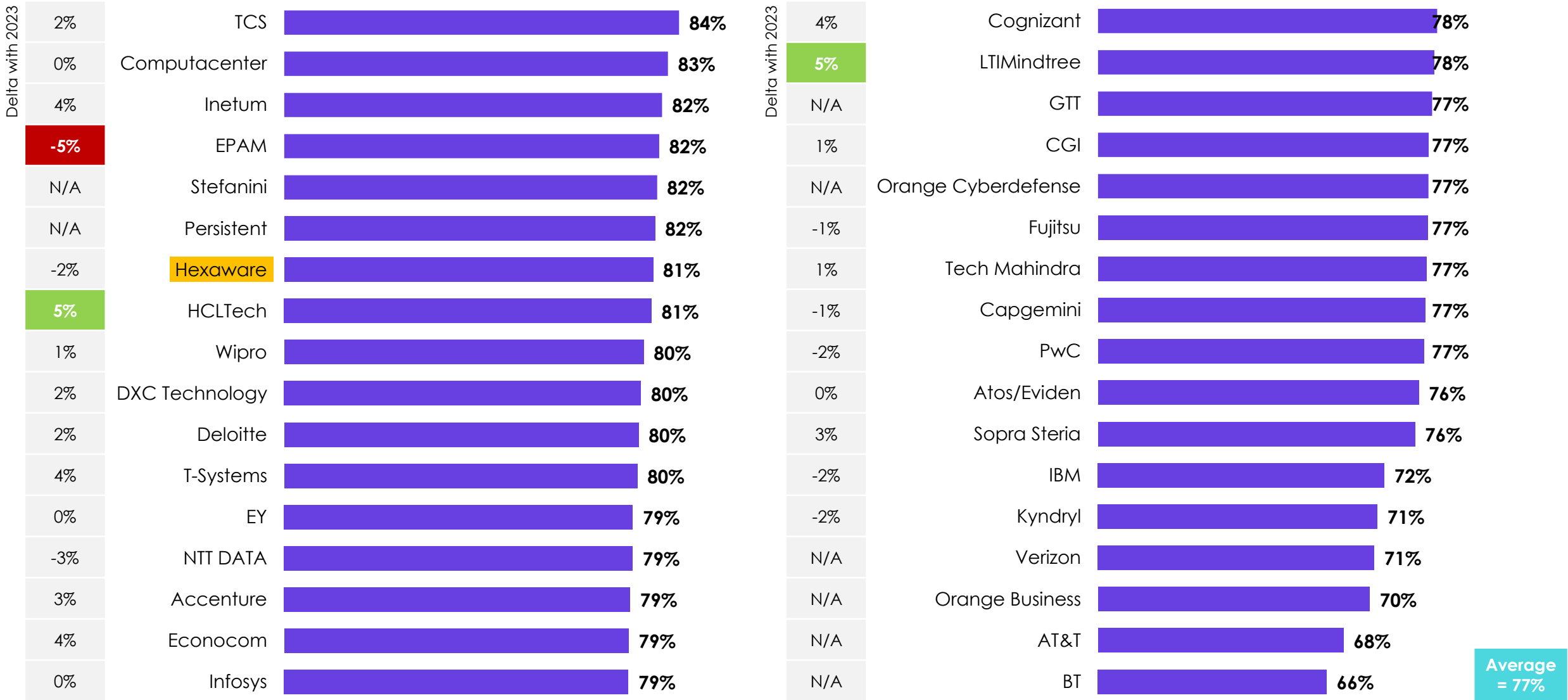
KPI 1: Service Delivery Quality

The service delivery is of good quality.



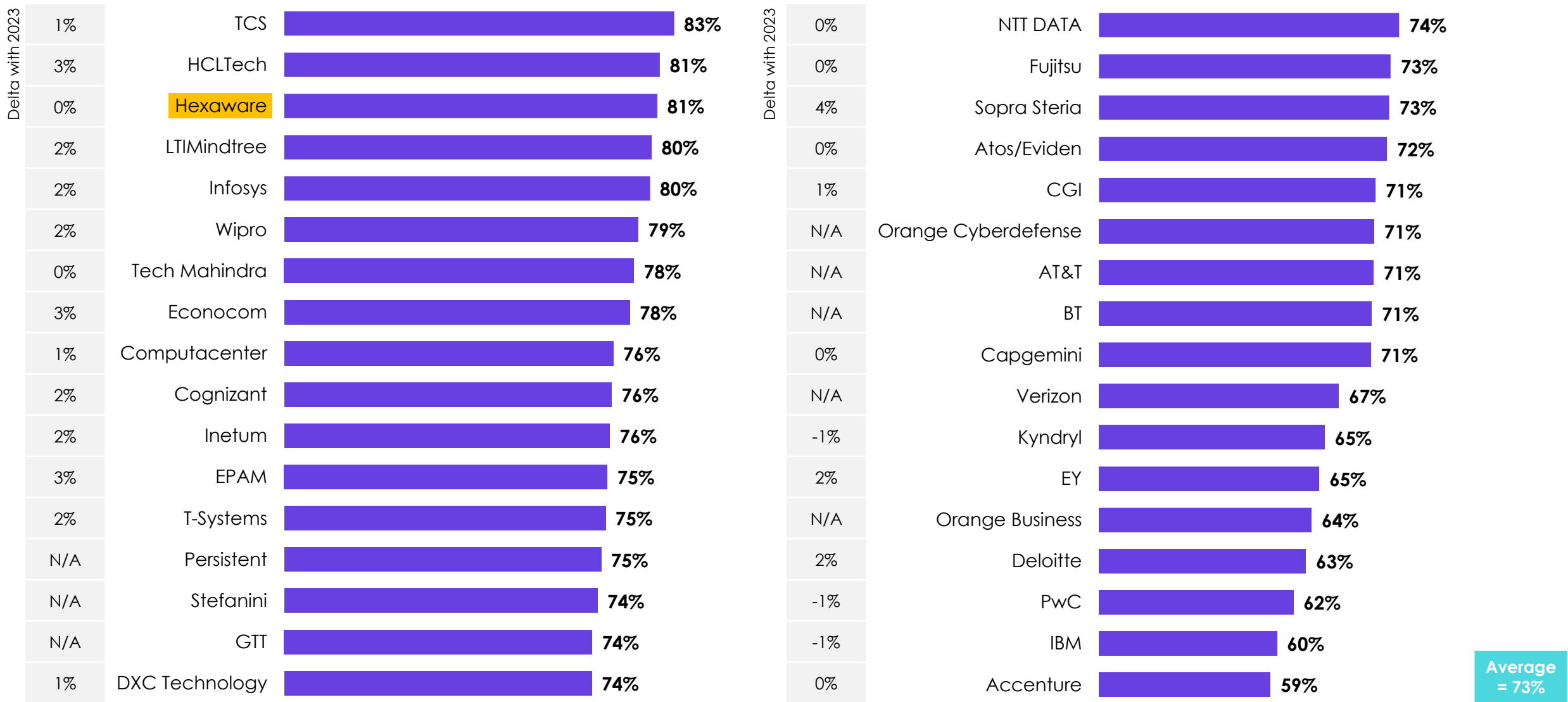
KPI 2: Account Management Quality

The account management is of good quality.



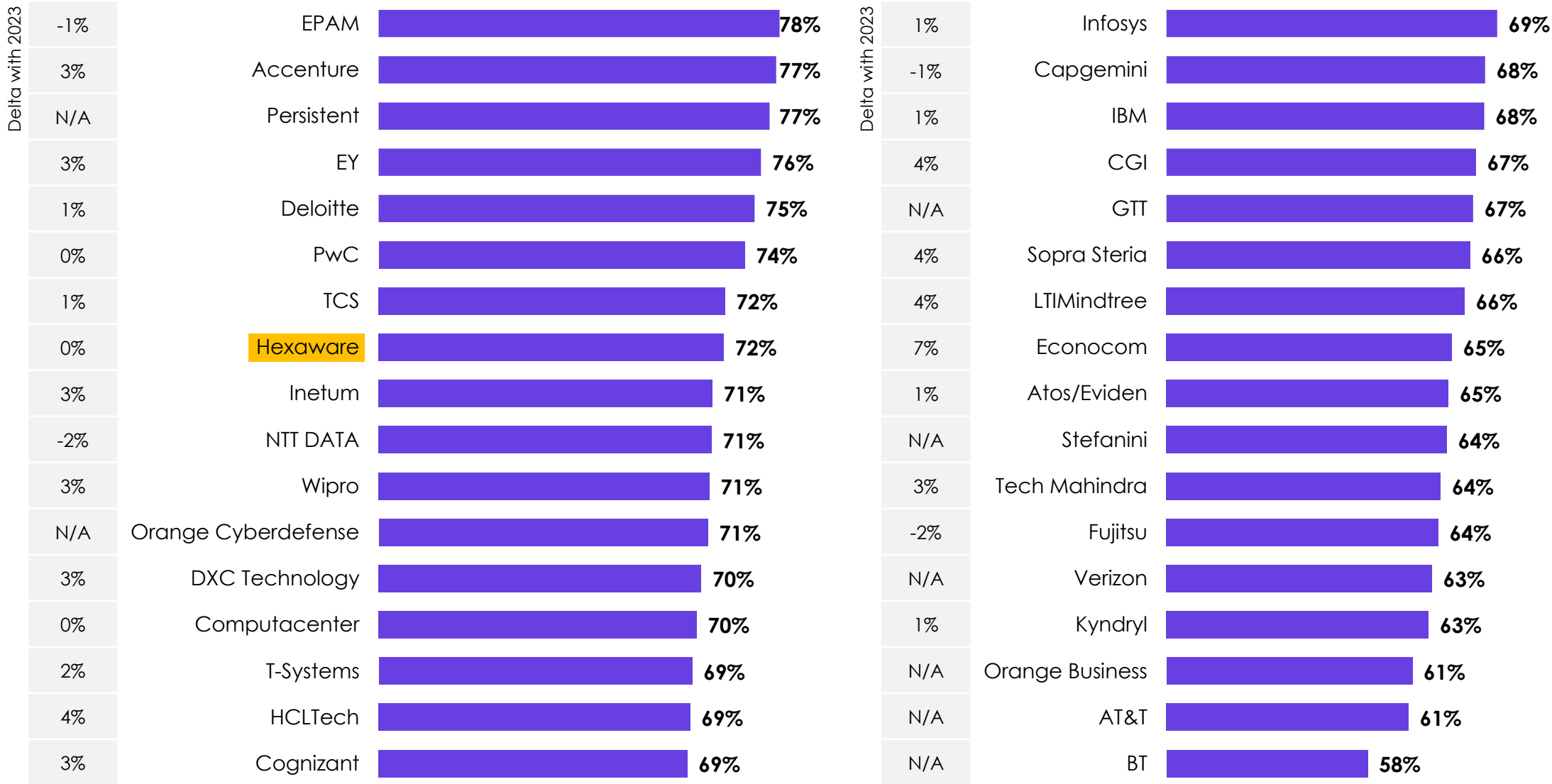
KPI 3: Price Level

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.



KPI Drilldown: Hexaware (1/2)

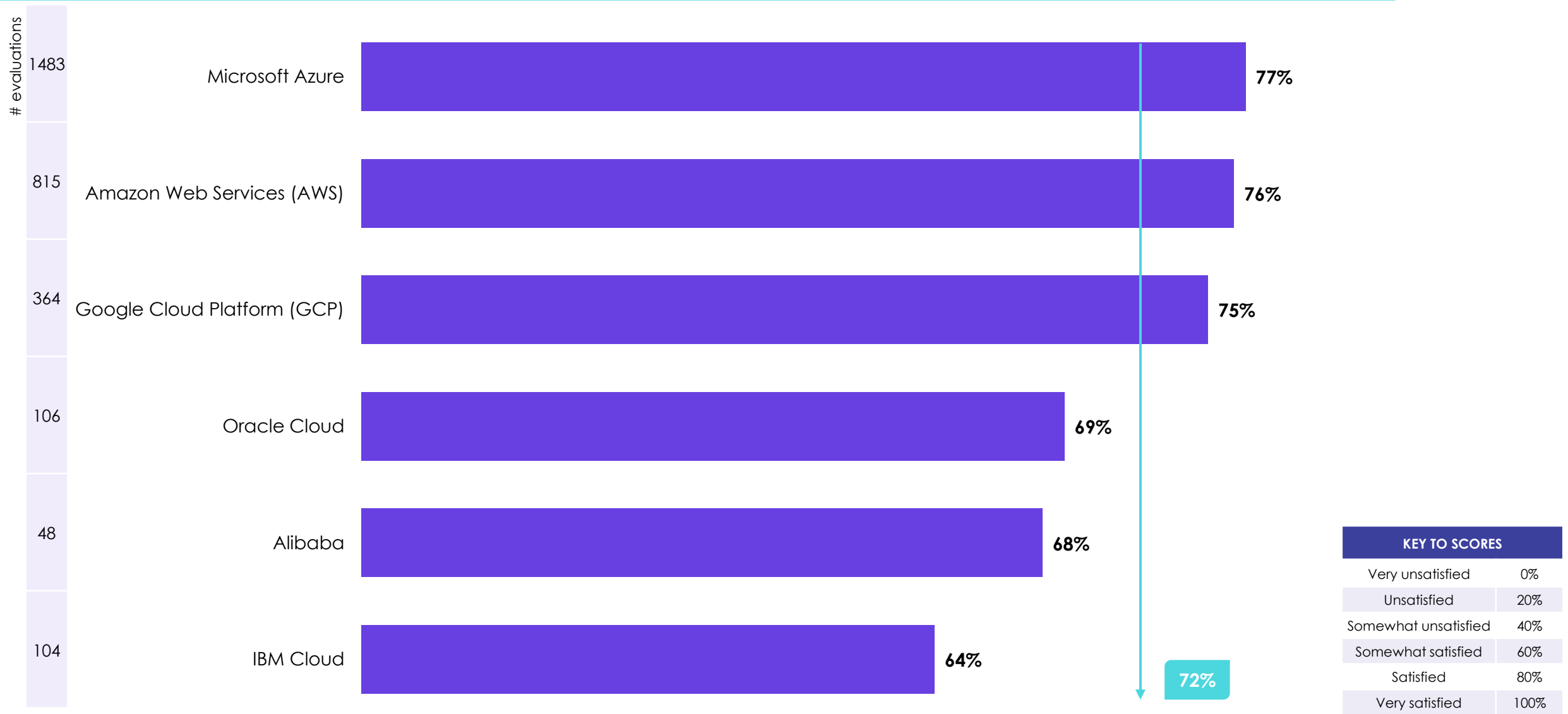
Service Provider	General Satisfaction	Service Delivery	Account Mgt	Price Level	Transformative Innovation
Hexaware	Very satisfied	Totally agree	Agree	Agree	Agree
Hexaware	Very satisfied	Totally agree	Agree	Agree	Agree
Hexaware	Very satisfied	Totally agree	Agree	Totally agree	Agree
Hexaware	Very satisfied	Totally agree	Agree		
Hexaware	Very satisfied	Totally agree	Somewhat disagree	Somewhat agree	Somewhat agree
Hexaware	Very satisfied	Agree	Totally agree	Totally agree	Totally agree
Hexaware	Very satisfied	Totally agree	Totally agree	Totally agree	Totally agree
Hexaware	Very satisfied	Totally agree	Totally agree	Totally agree	Totally agree
Hexaware	Very satisfied	Totally agree	Totally agree	Totally agree	Totally agree
Hexaware	Very satisfied	Totally agree	Totally agree	Totally agree	Totally agree
Hexaware	Very satisfied	Totally agree	Totally agree	Totally agree	Totally agree
Hexaware	Very satisfied	Totally agree	Totally agree	Totally agree	Totally agree
Hexaware	Satisfied	Agree	Agree	Agree	Agree
Hexaware	Satisfied	Agree	Agree	Agree	Agree
Hexaware	Satisfied	Agree	Agree	Agree	Agree
Hexaware	Satisfied	Agree	Agree	Agree	Agree
Hexaware	Satisfied	Agree	Agree	Agree	Agree
Hexaware	Satisfied	Agree	Agree	Agree	Agree
Hexaware	Satisfied	Agree	Agree	Agree	Agree
Hexaware	Satisfied	Agree	Agree	Somewhat agree	Agree
Hexaware	Satisfied	Agree	Agree	Totally agree	Agree
Hexaware	Satisfied	Agree	Agree	Agree	Somewhat agree
Hexaware	Satisfied	Agree	Agree	Totally agree	Somewhat agree

KPI Drilldown: Hexaware (2/2)

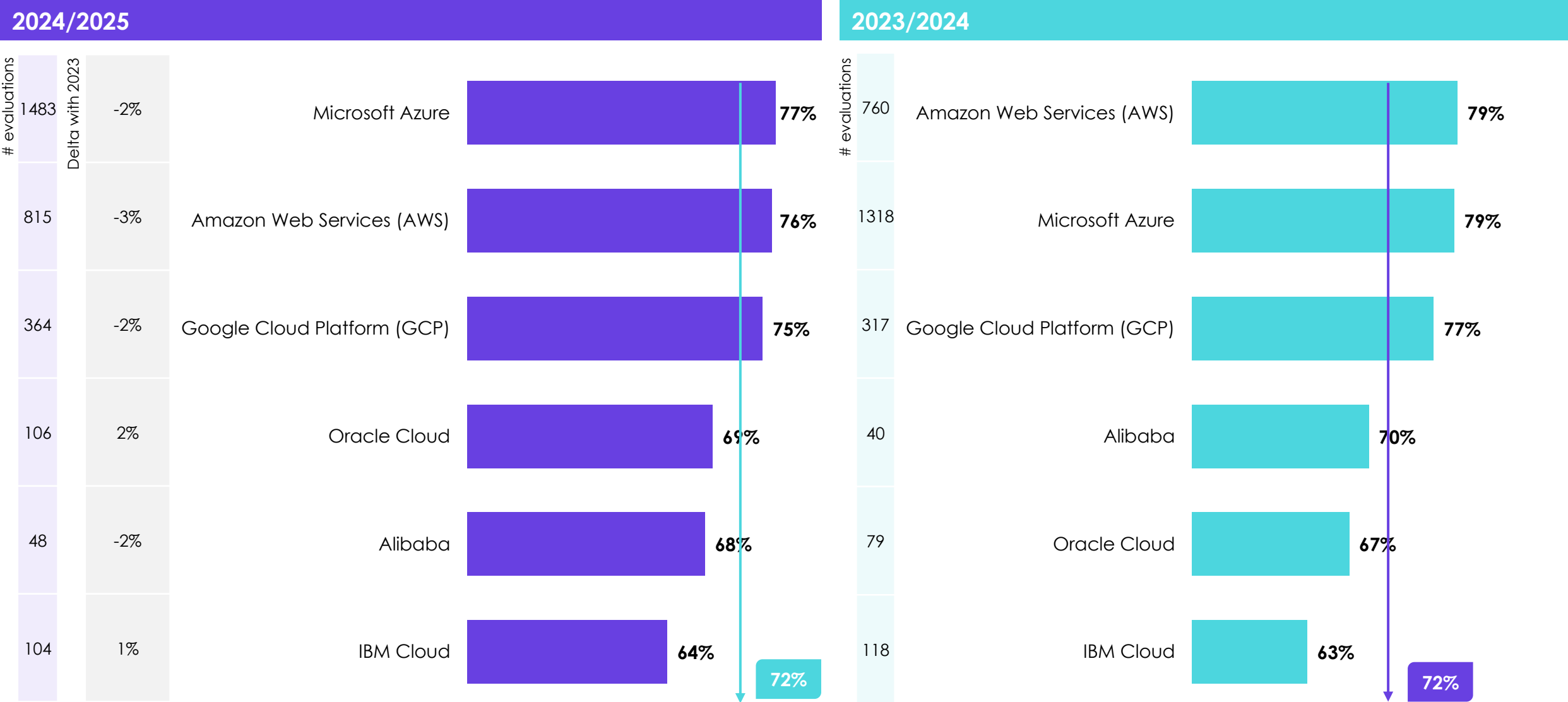
Service Provider	General Satisfaction	Service Delivery	Account Mgt	Price Level	Transformative Innovation
Hexaware	Satisfied	Agree	Agree	Agree	Somewhat disagree
Hexaware	Satisfied	Agree	Agree	Somewhat agree	Somewhat disagree
Hexaware	Satisfied	Agree	Agree	Agree	Totally agree
Hexaware	Satisfied	Agree	Agree	Totally agree	Totally agree
Hexaware	Satisfied	Agree	Agree		
Hexaware	Satisfied	Agree	Somewhat agree	Agree	Agree
Hexaware	Satisfied	Totally agree	Somewhat agree	Somewhat agree	Somewhat agree
Hexaware	Satisfied	Agree	Totally agree	Agree	Agree
Hexaware	Satisfied	Agree	Totally agree	Agree	Agree
Hexaware	Satisfied	Agree	Totally agree	Agree	Agree
Hexaware	Satisfied	Agree	Totally agree	Agree	Agree
Hexaware	Satisfied	Agree	Totally agree	Totally agree	Agree
Hexaware	Satisfied	Agree	Totally agree	Totally agree	Somewhat disagree
Hexaware	Satisfied	Somewhat agree	Agree	Agree	Agree
Hexaware	Somewhat satisfied	Somewhat agree	Somewhat agree	Somewhat agree	Disagree
Hexaware	Somewhat satisfied	Somewhat agree	Agree	Agree	Disagree
Hexaware	Somewhat satisfied	Somewhat agree	Agree	Agree	Somewhat agree
Hexaware	Somewhat satisfied	Somewhat disagree	Agree	Somewhat agree	Somewhat disagree
Hexaware	Somewhat satisfied	Somewhat agree	Somewhat agree	Somewhat agree	Somewhat agree
Hexaware	Somewhat satisfied	Somewhat agree			
Hexaware	Somewhat unsatisfied	Somewhat disagree	Disagree	Somewhat disagree	Disagree
Hexaware	Somewhat unsatisfied	Somewhat disagree	Somewhat agree	Somewhat disagree	Somewhat disagree

03

Cloud platform provider performance



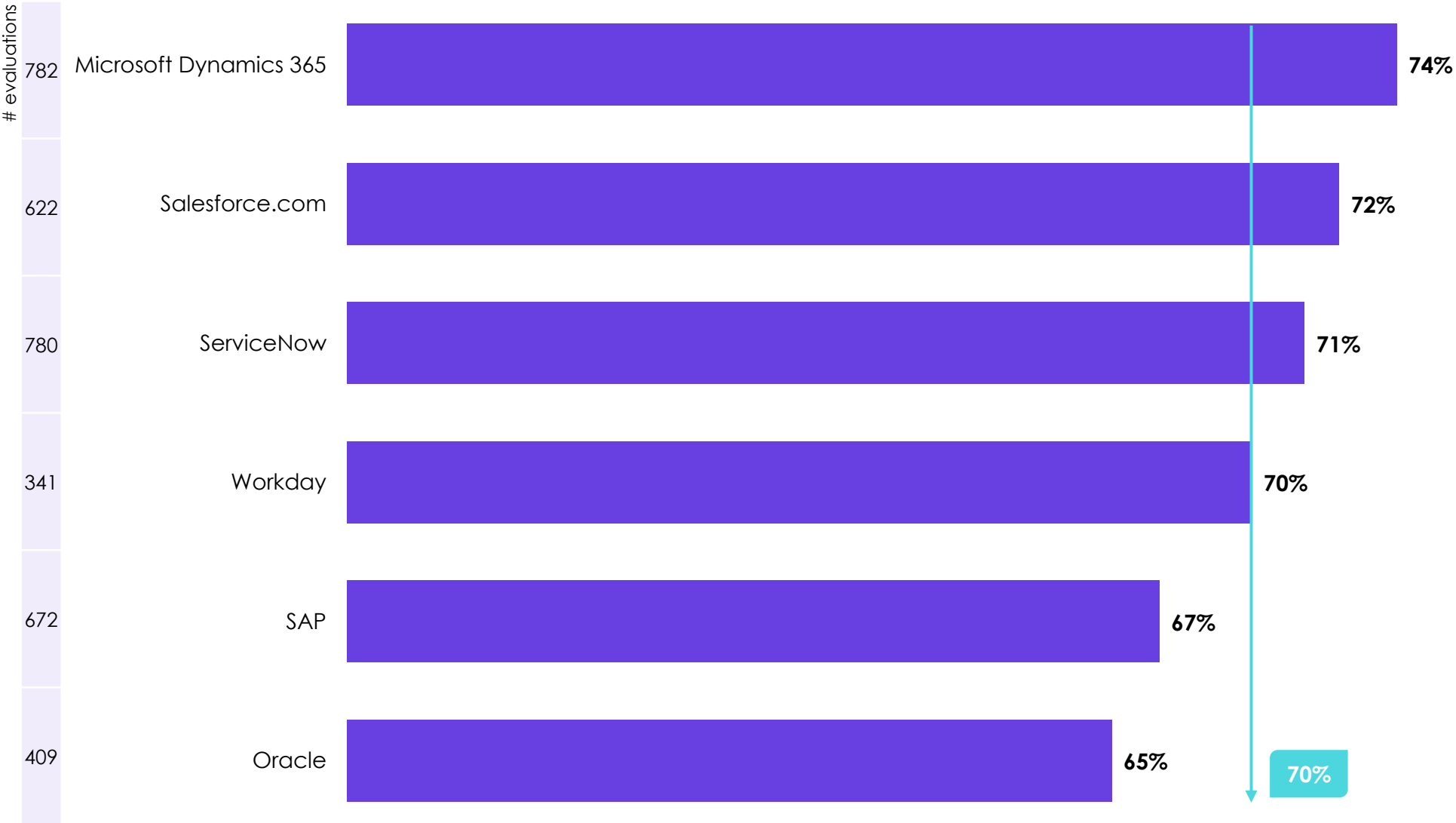
Infrastructure cloud platforms (Comparison with 2023/2024)



03

Cloud platform provider performance

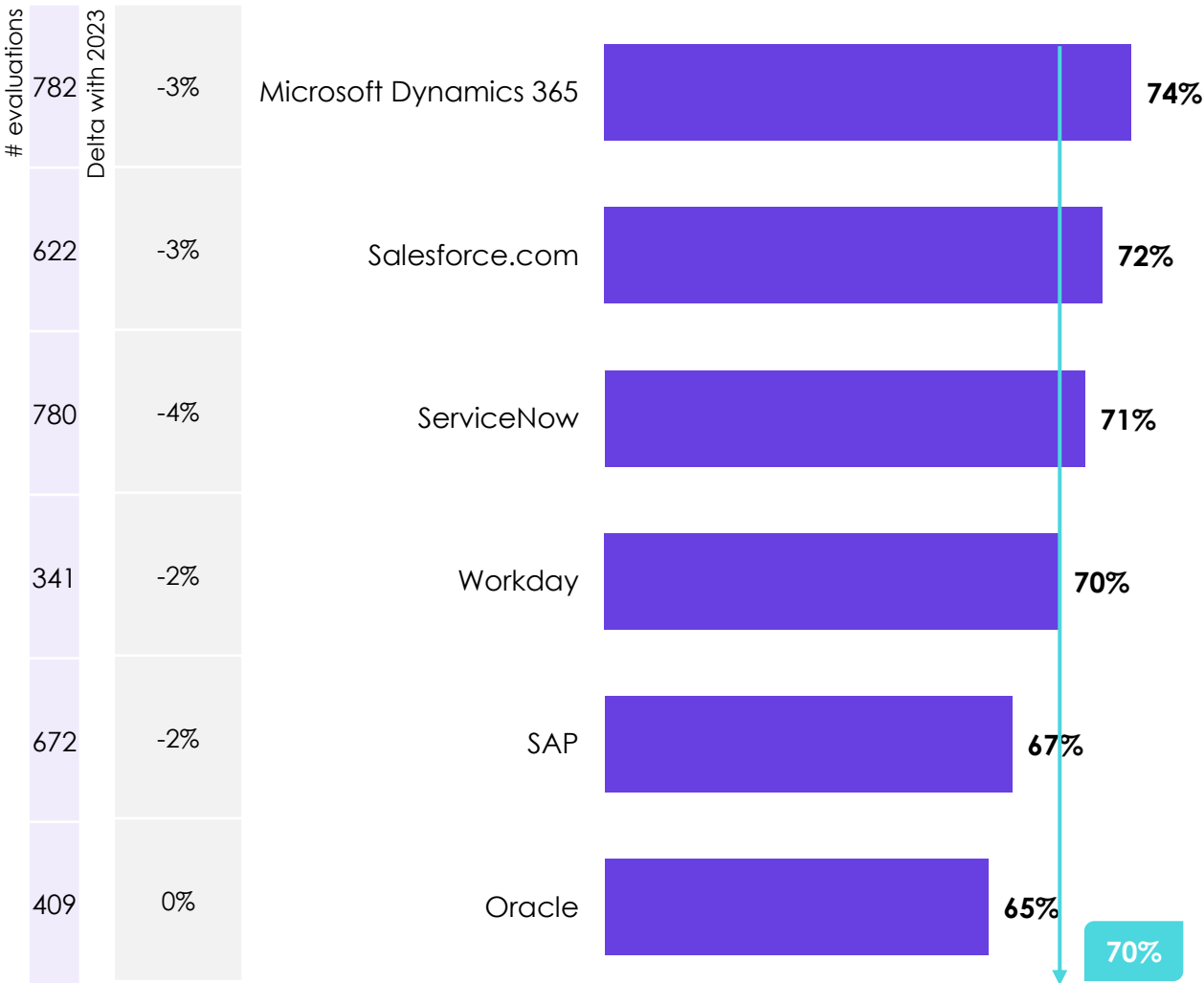
Software cloud platforms



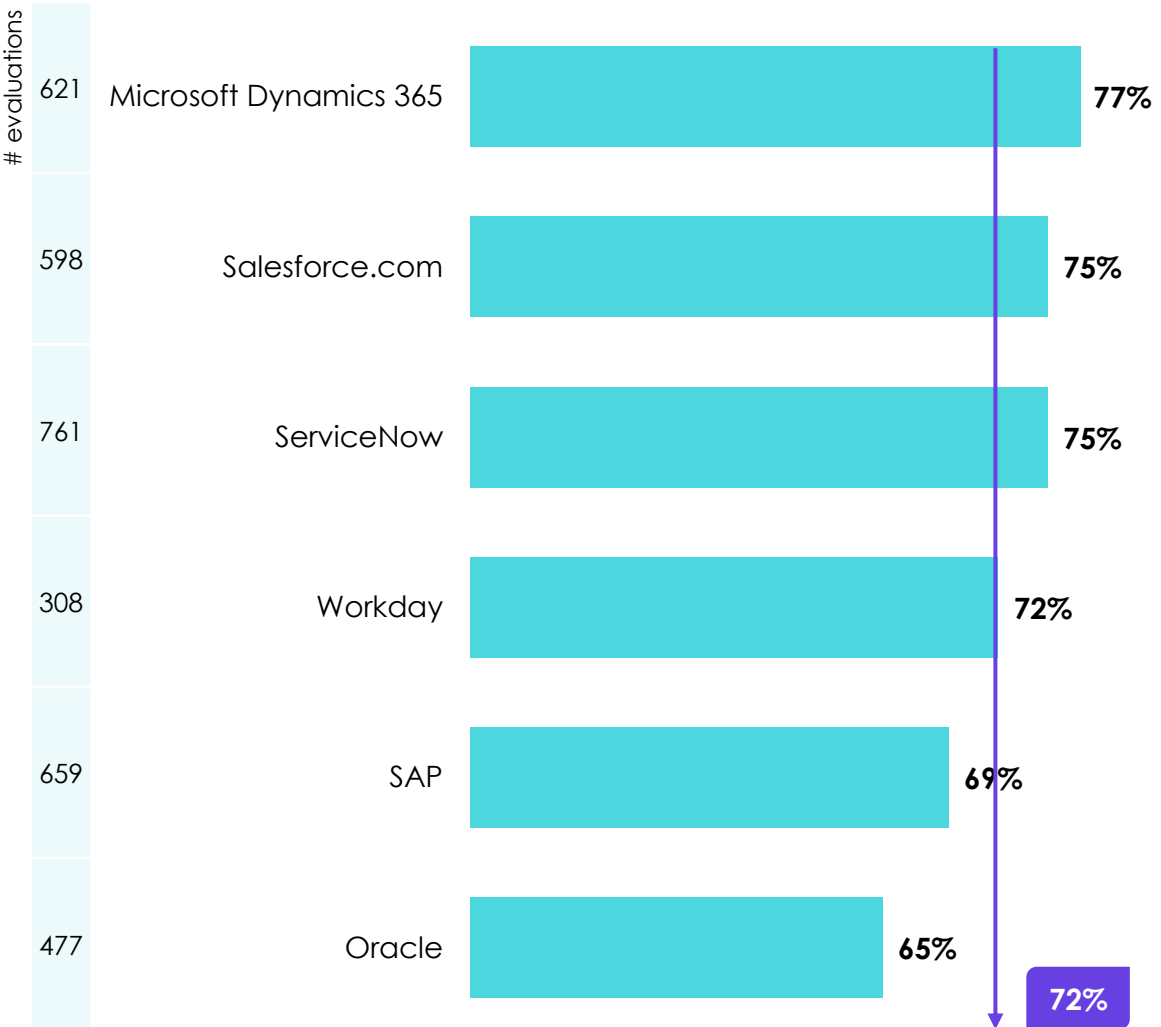
KEY TO SCORES	
Very unsatisfied	0%
Unsatisfied	20%
Somewhat unsatisfied	40%
Somewhat satisfied	60%
Satisfied	80%
Very satisfied	100%

Software cloud platforms (Comparison with 2023/2024)

2024/2025



2023/2024



The background of the slide is a dark grey or black field filled with a complex network of thin, overlapping lines in various colors including yellow, green, blue, and magenta. These lines intersect to form a web-like pattern of small, irregular polygons. A solid dark blue rectangular box is positioned on the left side of the image, containing the text.

Thank you!

Please let us know if you have any questions.

Contacts



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