NTT

2020 Global Managed Services Report

How organizations adopt smart sourcing to navigate with confidence.

Our research lifts the lid on the importance of smart sourcing, covering the challenges and opportunities felt by business and IT leaders across the world.

All seen through the lens of security, transformation reimagined and technical expertise.

The study in numbers

Conducted by IDG Research

1,250 IT and business leaders

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

29 countries
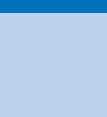
from across 11 sectors, including:

Retail · Manufacturing · Finance and professional services · Education · Healthcare and pharmaceutical

Three core themes

1. **Identify and secure your assets**
2. **Transformation reimagined**
3. **Expertise and Service Provision**

Identify and secure your assets

Evaluating security postures and dealing with security risks is a perennial challenge, particularly in light of the surge of BYOD and remote working. All endpoints need to be secured and updated

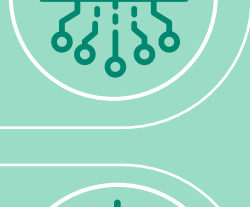**Reducing security risks** is also the top driver for service provider consideration, as cited by **65%** of people globally

Reducing security risks is cited as the top challenge for IT teams, the highest percentage among all factors

55% said it's also the most common challenge service providers can help global organizations with

Pressures placed on IT teams is further compounded by a lack of resources and skills

44% of organizations do not have adequate resources or skills in-house to cope with the number of security threats they face

62% of organizations said they expected an increased need for cybersecurity/IT support skills over the next two years
(NTT Ltd's Customer Experience Benchmarking Report 2020)

How NTT Ltd. helps

The ability to flex, scale and turn data into knowledge is a core benefit of a platform-based approach to delivering security services. Instead of merely seeing isolated events, we provide you with your entire security picture, giving you insights and metrics into future trends and methods to remain one step ahead of attackers.

Transformation reimagined

Refocus on end-user transformation

Transformation aspirations shift to enable the end user. Keeping people secure, engaged and productive is top of mind

52% said cloud will have the most transformational impact on their organization's business operations
(451 Research - Global Crystal Ball 2019)

43% rated SD WAN as the top consideration for implementing new technology

Smart sourcing helping end-user transformation

Organizations need the right tools, delivered through the right digital platforms to meet customer experience demands

Over the course of the next 18 months, **45%** will outsource more than they insource

Clearly identifying both short-term and long-term business / operational benefits rated as the most important factor for getting the most out of transformation efforts
(NTT Ltd's Digital Means Business Report)

How NTT Ltd. helps

Technologies such as SD WAN allows organizations to push WAN services to remote workers, extend policy changes, security updates and other centralized activity directly to them. Ultimately improving performance and user experience by gaining visibility of corporate assets and data across the network.

Expertise, service continuity, reducing complexity

Technical expertise and simplicity of engagement are crucial when selecting a service provider

44% rate technical expertise as the most important criteria for selecting a service provider
(451 Research - Global Crystal Ball Study 2019)

46% manage between 6 - 10 core vendor relationships resulting in increased complexity

Business and IT convergence

Most organizations have a misalignment between the business and IT

Only **29%** of IT and business teams collaborate consistently on digital transformation
(NTT Ltd's Digital Means Business Report)

54% said new product development will be the biggest impact on IT decision-making

How NTT Ltd. helps

The delivery of platform-enabled solutions at speed, across the entire technology stack is so important. From cloud to networking, data center to security and more, breadth and depth of capability is essential to recover and restore operations and position organizations strongly for the coming years.

We believe that your business can rise above disruption.

Together we can help you navigate the new normal with confidence.

Complete the self-assessment

How is your current service provider relationship? We've developed a smart sourcing self-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.

hello.global.ntt