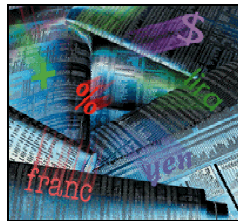


Striving for Identity in Managed Services



2004 Brand Tracking Study

Even with an improving economy, most enterprises are looking for ways to limit new technology investments and reduce ongoing technology operating costs. As a result, outsourcing in general and managed services in particular have gained interest and attention among enterprises of all sizes.

Responding to growing demand, a wide array of technology vendors and IT services providers has entered the managed services market with a rapidly expanding assortment of offerings.

Yet the market remains quite immature. Providers of IT Infrastructure and network management services have substantial work ahead of them in creating strong market positions, clear differentiation from competitors, and persuasive credibility around key buyer concerns.

REPORT HIGHLIGHTS

OVERVIEW

Striving for Identity in Managed Services: 2004 Brand Tracking Study provides a detailed analysis of how IT and business executives assess leading managed services providers and the market as a whole.

The report focuses on IT managed services, defined as IT infrastructure and network management services. Based on interviews with 300 U.S.-based IT executives from large companies in five major industries, the report is designed to help networking services firms plan marketing initiatives, shape market perceptions, and track the effectiveness of marketing programs on an ongoing basis.

The report addresses such critical concerns as:

- Market drivers for purchasers of IT infrastructure and network management services
- Unaided and aided awareness of leading firms
- Familiarity, favorability, and preference towards specific firms
- Competitive market positioning of leading firms
- Importance of different attributes of managed services for buyer evaluation and selection
- Sources of information that most influence buyers

SAMPLE FINDINGS

Brand Awareness

- IBM Global Services is the only firm that a majority of buyers cited when asked if they could name a provider of IT managed services
- Only a few respondents named most of the leading providers. Almost a quarter of respondents could not name a single firm.

Buyer Selection Criteria

- Buyers ranked a vendor's ability to secure networks as one of the top criteria for selecting a managed services provider.
- The gap between importance and performance is substantial for all of the most important vendor attributes—not just security but also delivery on promises, collaborative work style, problem-solving expertise, and flexible and scalable solutions.

Sources of Information

- Buyers rely much more heavily on independent information sources such as colleagues, peers, and third-party experts than on vendor sources to identify potential providers.

STUDY SCOPE AND METHODOLOGY

From September through November 2003, ITSMA conducted interviews with 300 IT executives involved in the purchase of IT infrastructure and network operations services to assess the brand awareness and market positioning of the major industry services providers. The study respondents all held director-level positions or higher and represented organizations in five major industries (financial services, manufacturing; consumer and industrial products, public sector, retail and wholesale trade, and healthcare delivery) and with revenues or operating budgets ranging from \$200 million to over \$20 billion.

COMPANIES COVERED

Companies covered in detail include: Accenture, AT&T, Avaya, Cap Gemini Ernst & Young, Cisco Systems, Computer Sciences Corporation (CSC), EDS, Hewlett-Packard, IBM Global Services, MCI, NextiraOne, NCR, Nortel Networks, Siemens, Sprint, Unisys, and Verizon.

REPORT TOPICS

Striving for Identity provides detailed data and analysis on the following topics:

- Anticipation and drivers of change to IT infrastructure
- Definition of IT managed services
- Unaided and aided awareness of IT infrastructure and network operations firms
- Recognition of primary sponsors and other leading firms
- Familiarity with and favorability of specific firms
- Preference for doing business with specific firms
- Competitive positioning of primary sponsors and other leading firms
- Importance of attributes in the selection of IT infrastructure and network operations firms
- Comparison of attributes of primary sponsors and other leading firms
- Most important sources of information about managed services providers

MORE INFORMATION

To learn more about the report, contact Rob Leavitt, Senior Director, Marketing and Member Advocacy at +1-781-862-8500, ext. 45, or rleavitt@itsma.com.

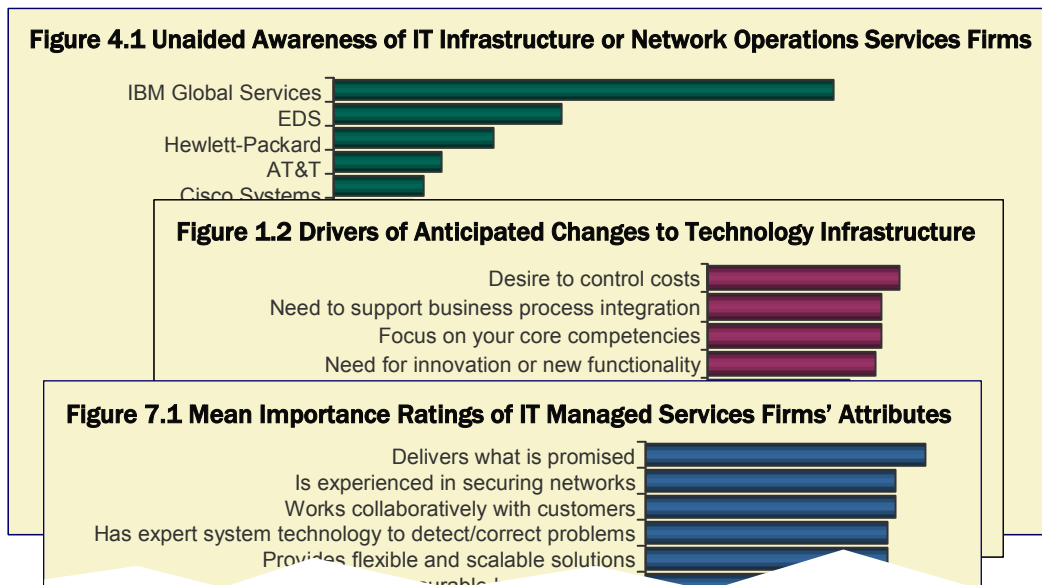


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