

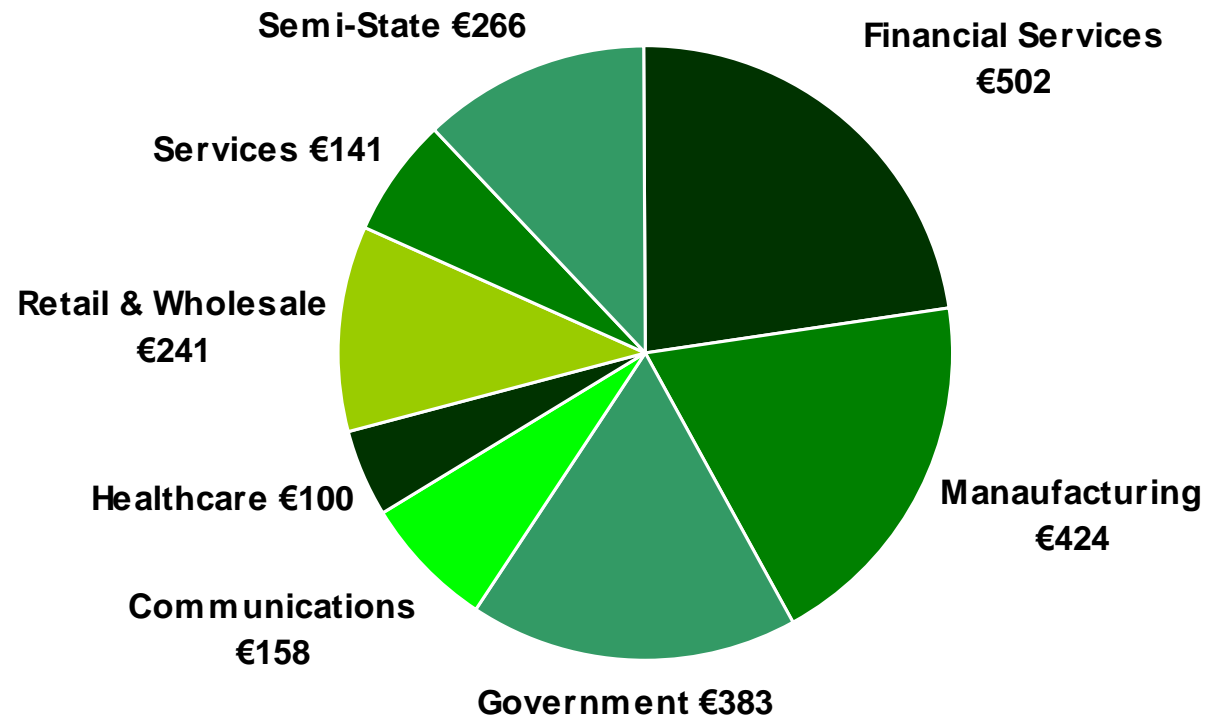
Managed Services in the Public and Private Sectors

Oisín Byrne
Managing Director

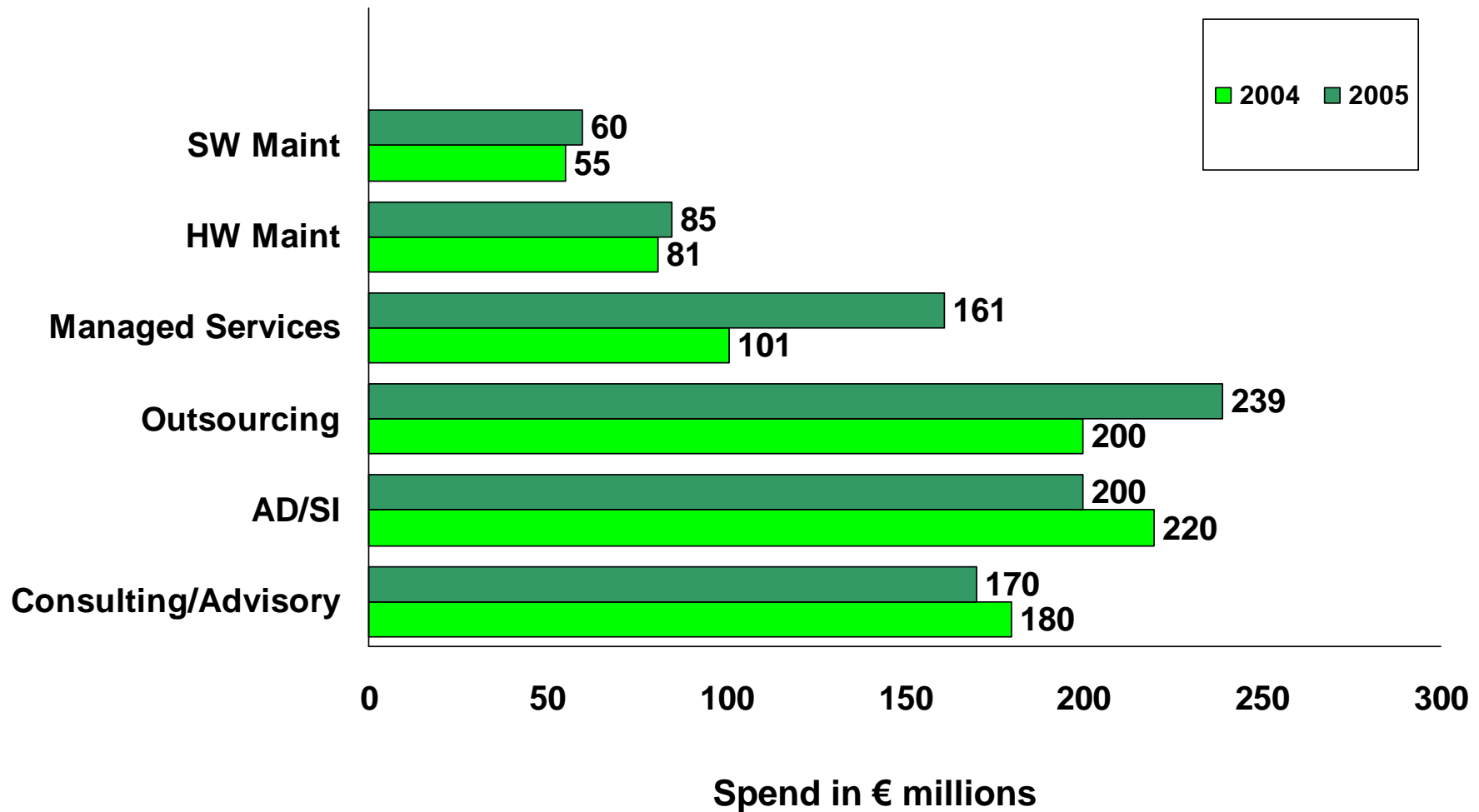


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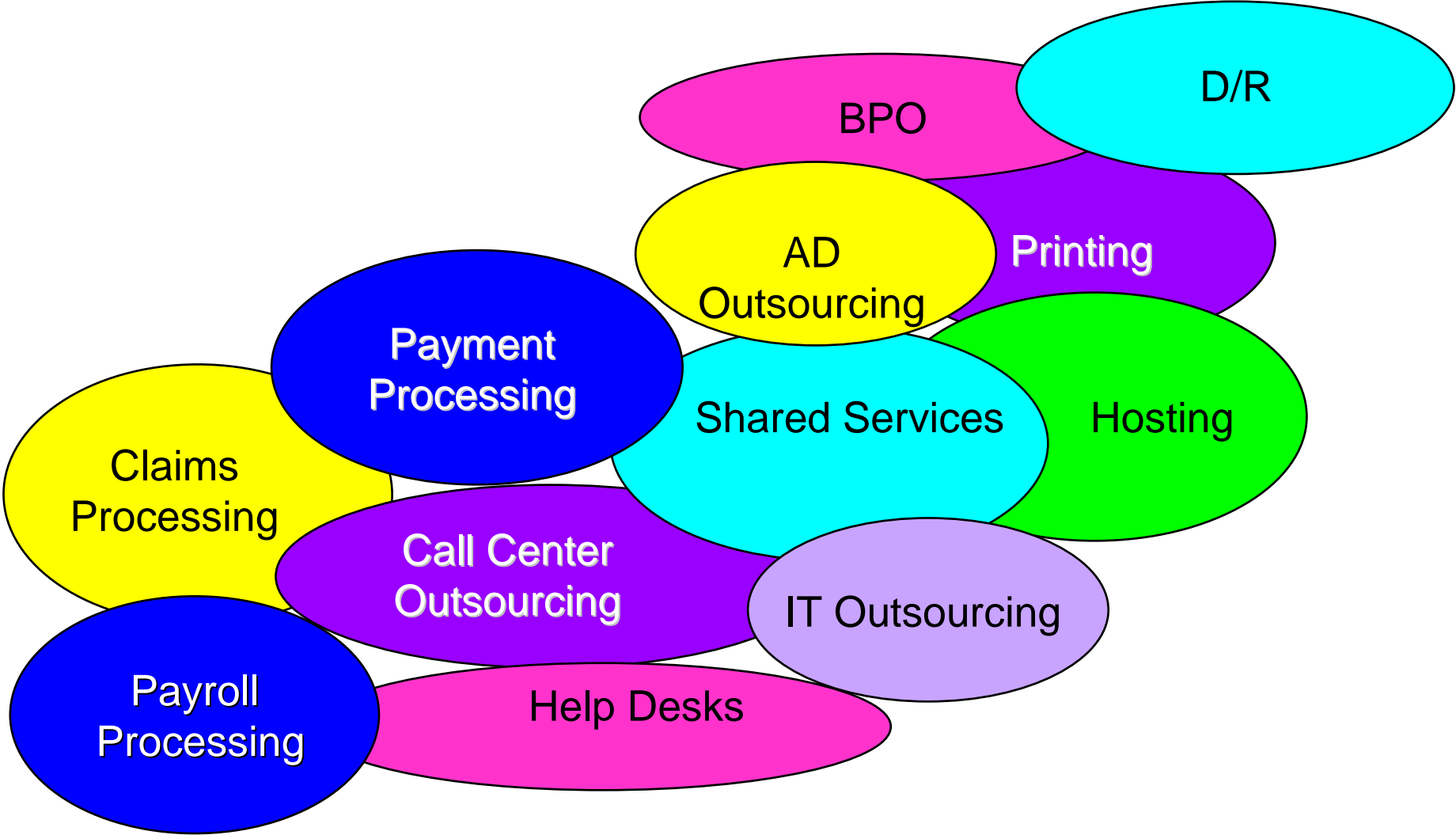
IT Spend by Industry Vertical



IT Service Spend in 2005



Right Sourcing: Many offerings



Market Drivers

- Resistance to Outsourcing
- People Issues
- Scale of Operation
- Market Confusion
- Over focus on Costs
- Length of Deals
- Rigid SLAs based on IT not Business
- Market needs more creative offerings

Drivers in Public Sector

- De-Centralisation
 - Separate People, Process and Systems
- Shared Services
 - Cluster of Departments
- Right Sourcing
 - Mix or blend of offerings
- 2006 to see lots of activity
 - Small Managed Service Deals
 - Large Managed Service Tenders

Drivers in Private Sector

- Outsourcing Backlash
- Lack of understanding of Big Picture
- Progressive or Selective outsourcing
 - AD Outsourcing
 - APP Outsourcing
 - Call Centre Outsourcing
 - Desktop Outsourcing
 - Network Outsourcing
 - Security Outsourcing
 - Website Hosting

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Close and Questions



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