

GARTNER GLOBAL SOURCING SUMMIT

Building Global Sourcing Relationships Worldwide

Gartner Predicts: The Bubble is About to Burst on Offshore Cost Savings ...

Yet corporations are rapidly expanding their outsourcing initiatives ... and enjoying a whole world of new benefits

NOVEMBER 1-3, 2005
THE HOTEL DEL CORONADO
SAN DIEGO, CA

Explore profitable new sourcing trends with:

- Top Gartner Offshore Analysts
- CIOs and Senior IT Executives
- The Leading Global Service Providers

Featured Speakers:



PARTHA IYENGAR

Gartner Research VP

Recently seen on "60 Minutes" and extensively quoted by the press. Actively tracks the competitive positioning of leading global offshore service vendors.



IAN MARRIOTT

Gartner VP & Research Director

Veteran of large-scale outsourcing projects worldwide. Expert in contract negotiation, service delivery and public sector issues.



KJELL NORDSTROM

Assistant Professor at the Institute of International Business at the Stockholm School of Economics

His focus is on research, consulting and management training in the areas of corporate strategy, multinational corporations and the process of internationalization.

CONFERENCE HIGHLIGHTS

KEYNOTE SPEAKER

Dr. Kjell Nordstrom

Assistant Professor at the
Institute of International
Business at the Stockholm
School of Economics



Kjell Nordstrom's focus is on research, consulting and management training in the areas of corporate strategy, multinational corporations and the process of internationalization. The 2001 Thinkers 50, the world's premier ranking of management thinkers, ranked Nordstrom and his partner Dr. Jonas Ridderstrale at number 21 (one place below Bill Gates).

Their collaboration has produced the international best-seller *FUNKY BUSINESS: Talent Makes Capital Dance*, and the long awaited follow up *KARAOKE CAPITALISM: Management For Mankind*.

Kjell's work has been featured on CNN and CNBC, and appeared in *Fortune*, *Fast Company*, *Time Magazine*, *Financial Times* and *Paris Match* amongst others. His book *FUNKY BUSINESS: Talent Makes Capital Dance* has been translated into more than 25 languages and in 2000, both Amazon.co.uk and Management General rated *FUNKY BUSINESS* as one of the five best business books of that year. So far, *KARAOKE CAPITALISM: Management For Mankind* is being met with similar acclaim.

"The Global Sourcing Summit was an outstanding Event. It provided me an excellent opportunity to know the Vendor companies and their capabilities – learning from the companies that have already taken the plunge."

Ritu Krishana

Senior Director, Sabre Holdings

Gartner 2005/2006 Outsourcing Predictions



Gartner

Ian Marriott
Gartner VP & Research Director

As costs increase in the leading outsourcing countries, the bubble is beginning to burst on the labor savings of taking work offshore.

Yet, despite that, outsourcing initiatives are expanding as companies mature and recognize a whole range of new benefits inherent in the globalization of services – including access to specialist or scarce skills for increased resource flexibility and 24 x 7 support.

And as more and more countries jump into the outsourcing fray, the marketplace is also expanding -- creating even more attractive offshore options to choose from.

Yet, as the offshore marketplace matures, new challenges are emerging including the issues of intellectual property, security, privacy, geopolitical risk, and managing the impact of workforce change.

In November at the 2nd Annual Gartner Global Outsourcing Summit, I will be leading a team of top Gartner sourcing analysts to explore these new trends in global outsourcing to assist CIOs and senior-level IT executives in formulating the most advantageous sourcing strategy for their companies. In addition, the top global service providers will conduct exclusive Case Study Presentations with small groups of Decision-Makers to delve further into specific types of IT outsourcing solutions.

At the Global Sourcing Summit, my team of analysts will guide you on:

- **How to go beyond mainstream outsourcing in application services to back office BPO and infrastructure**
- **What's happening in emerging outsourcing centers such as China**
- **The next-generation of outsourcing benefits that go beyond simple cost-savings**
- **How to manage the impact of workforce change**
- **How to deal with the issues of intellectual property, security, increased legislation, geopolitical risk, and privacy**
- **How to achieve process excellence through skilled providers from other countries**
- **The longer-term changes you can expect that will affect the whole concept of work as we know it now**

We invite you to be part of this high-level dialogue with your peers and potential offshore partners.

Ian Marriott

HOW TO PARTICIPATE

SENIOR IT & SOURCING EXECUTIVES

Complimentary, Expense-Paid Summit Packages Are Available For ...

- CIOs
- CEOs
- COOs
- CMOs
- VPs and Directors of IT/IS
- CFOs
- Other key Decision-Makers responsible for the evaluation, recommendation and purchase of IT solutions, products and services.

Our invitation-only audience of CIOs, Sourcing Officers and Global Sourcing VPs not only gain insight meeting with the top Gartner sourcing analysts and participating in high-level peer-to-peer networking, they also meet in private Case Study Presentations with the world's leading global service providers from India, Central and Eastern Europe, and Russia, as well as the United States.

As a result of attending the Summit, our Executive Guests return to their offices with a quality list of Service Providers who meet their sourcing criteria – consolidating months of meetings into 3 business intensive days.

If You Qualify, You Will Receive:

- Roundtrip airfare
- Deluxe hotel accommodations
- All meals and social functions
- Full Summit Registration

To see if you qualify, go to:
www.globalsourcingsummit.com/us/registration/application.php

To view the roster of our guests from 2004, go to: www.globalsourcingsummit.com/2004_IT_Executives

TECHNOLOGY PROVIDERS

Case Study Presentations are the only way for Technology Providers to participate at this popular Gartner Global Sourcing Summit

To arrange your Case Study Presentation, contact:

Tim Brooks at 866.877.7185 or 603.471.4205 tim.brooks@gartner.com

Reserve Your Case Study Presentation today

To Meet Corporate Executives Making 2006 Outsourcing Decisions

- Achieve the highest ROI of any business activity in the offshore sourcing marketplace
- Consolidate months of business trips into a single two-day cycle
- Present to C-Level executives actively looking for your type of outsourcing services
- Learn about best practices in leveraging global sourcing

Limited Case Study Sponsorships Available to Global Suppliers of:

- Application Development Services
- Application Maintenance
- Business Process Outsourcing
- Help Desk Services
- IT Infrastructure Outsourcing
- Packaged Application Support

“Great forum that brought together the buyers and suppliers of IT services in a format that provided knowledge/insight and facilitated the Vendor dialogue at the same time.”

Sumeet Sabharian
VP, Global Delivery, Navisite

Agenda-at-a-Glance*

AGENDA

Tuesday, November 1

1:00 p.m. – 8:00 p.m.	Registration	
6:00 p.m. – 6:30 p.m.	Round Table Discussions (Executive Guests Only)	
6:45 p.m. – 7:00 p.m.	Welcome - Ian Marriot	
7:00 p.m. – 8:00 p.m.	Welcome Reception	Keynote Presentation, presented by Kjell Nordstrom

Wednesday, November 2

7:00 a.m. – 7:50 a.m.	Breakfast	
8:00 a.m. – 8:50 a.m.	Gartner Insight Session	Scenarios for Outsourcing: How Global Sourcing Must Evolve (Ian Marriott and Allie Young)
9:00 a.m. – 9:50 a.m.	Gartner Insight Session	Pricing Myths - A Look at Risk Adjusted Costs in a Globally Sourced World (Frances Karamouzis)
10:00 a.m. – 11:50 a.m.	Case Study Presentations	
Noon – 1:00 p.m.	Attendee Lunch	
1:30 p.m. – 2:20 p.m.	Gartner Insight Session	Security And Privacy Issues With Global Sourcing (Arabella Hallawell)
2:30 p.m. – 3:40 p.m.	Case Study Presentations	
4:00 p.m. – 5:00 p.m.	Gartner Insight Session	CHOICE: Captive Center Dynamics - A Cookbook (Partha Iyengar) or ... Global Infrastructure Service Offerings (Rich Matlus)
5:00 p.m. – 7:00 p.m.	Global Sourcing Pavilion	

Thursday, November 3

7:00 a.m. – 7:50 a.m.	Breakfast	
8:00 a.m. – 8:50 a.m.	Gartner Insight Session	Top Reasons Why Offshore Deals Fail (Helen Huntley)
9:00 a.m. – 10:50 a.m.	Case Study Presentations	
11:00 a.m. – Noon	Gartner Insight Session	Political and Economical Risk of Outsourcing by Country (Joseph Feiman)
Noon – 1:00 p.m.	Lunch	
1:30 p.m. – 2:50 p.m.	Case Study Presentations	
3:00 p.m. – 3:50 p.m.	Gartner Insight Session	CHOICE: Offshore BPO - "Inevitably Successful", or a Victim of its Own Success? (Robert Brown) or ... Offshore Outsourcing - An Opportunity or a Threat in Financial Services and Insurance? (Kimberly Harris-Ferrante)
4:15 p.m. – 6:15 p.m.	Global Sourcing Pavilion	
6:30 p.m. – 7:30 p.m.	Closing Panel Discussion	Partha Iyengar
7:30 p.m. – 9:00 p.m.	Awards Reception	

* Agenda current as of July 28, 2005 and is subject to change

SESSION 1: Scenarios for Outsourcing: How Global Sourcing Must Evolve—*Ian Marriott and Allie Young*

Global sourcing can no longer be pursued for isolated cost benefits alone – it is now an element that must be understood, employed and integrated with broader sourcing strategies to support broader business objectives for growth, speed, and agility. This session will explore:

How is the business environment changing buyer expectations? What are the key trends and market drivers? How will global sourcing evolve to meet new market demands?

SESSION 2: Pricing Myths—A Look at Risk Adjusted Costs in a Globally Sourced World—*Frances Karamouzis*

Evaluating sourcing options goes beyond comparing rate cards. It's complicated by different country options, service providers and maturity levels of services offerings (i.e. BPO, Applications, or infrastructure) -- as well as hidden or indirect costs. In this presentation, Gartner will look at the true cost in a risk adjusted cost structure to break the pricing myths and misperceptions.

What factors should be analyzed when comparing insourcing to outsourcing? What country factors, service provider criteria, hidden and indirect costs should be assessed? How do you evaluate cost in a risk adjusted model to include all the critical points of comparison?

SESSION 3: Security And Privacy Issues With Global Sourcing—*Arabella Hallawell*

Increasing political, regulatory and media scrutiny will continue to raise the stakes when companies use providers around the globe. Many of the security requirements are the same regardless of whether and where you outsource. In this session, we'll examine the impact of the regulatory landscape for privacy and security on a country-by-country basis, including:

What is the regulatory landscape and enforcement track records of the major offshoring jurisdictions? What are the costs, governance models, security capabilities, and contractual best practices? How do you protect from risks while giving up operational control?

SESSION 4A: Captive Center Dynamics—A Cookbook—*Partha Iyengar*

Should you set up your own Captive Center rather than engage in the services of a third party BPO? The various decisions and issues involved in evaluating, establishing and then managing an offshore captive center are examined in the context of the overall 'Captive Center Life-Cycle'.

What are the key evaluation parameters in establishing a Captive Center? What are the Critical Success Factors in each phase of the Life Cycle? What are best practices in Captive Center set-up and management?

SESSION 4B: Global Infrastructure Service Offerings—*Rich Matlus*

With the recent trend to offshore Application services, many enterprises are now examining other IT areas such as IT infrastructure and help desk. In deciding how offshore

infrastructure applies, service providers should understand what global infrastructure services that enterprises are seeking, who today's Global Service Providers (SPs) are and how they deliver their service.

What are the trends for Global IT infrastructure and help desk services? What are the critical success factors? What does the vendor landscape look like?

SESSION 5: Top Reasons Why Offshore Deals Fail—*Helen Huntley*

Many companies rush into offshore outsourcing deals with high expectations, but are disappointed when expected benefits fail to materialize. In this presentation we identify the top common failure points for offshore deals and the ways in which these failures can be avoided through appropriate advance planning.

What are the reasons that offshore deals fail? What can be done to ensure offshore deal success and client satisfaction?

SESSION 6: Political and Economical Risk of Outsourcing by Country—*Joseph Feiman*

The cost benefits of offshore outsourcing are attractive, but have you realistically accounted for the accompanying risk? This presentation introduces a model for evaluating those risks. It reviews offshore "hot spots", analyzes countries that may meet your needs, and advises on the optimal balance between cost savings and politico-economical risk.

What political and economical risk factors should be evaluated in offshore outsourcing decisions? How do you prioritize "sourcing" geographies from an acceptable risk perspective? What collaborative techniques should enterprises and ESPs apply to mitigate politico-economical risk?

SESSION 7A: Offshore BPO—"Inevitably Successful", or a Victim of its Own Success?—*Robert Brown*

Offshore BPO has generated intense debate (especially on the loss of jobs). Has the debate been settled? When is offshore the right choice versus traditional forms of BPO? Many CEOs still approach offshore sourcing from a short term economic angle. Is the quality really up to the mark? What does the future hold?

What are the current trends in offshore BPO? What are the Best Practices in Offshore BPO? Is Offshore BPO a Sustainable Business Model?

SESSION 7B: Offshore Outsourcing—An Opportunity or a Threat in Financial Services and Insurance?—*Kimberly Harris-Ferrante*

Conditions in the financial services and insurance industry are driving organizations to find new and innovative ways to support IT and business operations. While offshore outsourcing is an option, views on it are all over the map. This presentation will assess:

What is the current and future role of offshore outsourcing in the industry? What are the best practices for getting the most out of offshore delivery models? What are the best steps for mitigating risk?

A Whole World of Profitable New Opp

Develop and Validate 2006 Sourcing Strategy with Insights from Top Offshore Gartner Analysts

Gartner analysts are on the frontlines of outsourcing – advising clients on the dynamics on the marketplace and how to engage the best vendors for outsourcing services. They have written thought-leading research on outsourcing, are often quoted in the press, and even shape the outsourcing industry with their research insights and recommendations.

You will hear from the whole analyst team during this research-intensive Summit – and can arrange to meet firsthand with those Gartner analysts with the specific expertise to address your most pressing outsourcing challenges and questions.

OUR PARTICIPATING ANALYSTS



Ian Marriott
VP & Research Director

Mr. Marriott leads Gartner's offshore research community, which focuses on IT and business process outsourcing, global sourcing and delivery models, emerging supply markets and best practices. He is a frequent speaker and presenter at numerous Gartner and external forums and events around the world, and is extensively quoted in the national and international press.



Frances Karamouzis
Research Director

Ms. Karamouzis has approximately 13 years of experience in strategy, business process and information technology management across a wide range of service delivery areas and industries.



Linda R. Cohen
MVP

Linda Cohen is a managing vice president and chief of research in Gartner Research, where she leads the worldwide focus and development of Gartner's sourcing research, providing life cycle advice to clients procuring or delivering strategic sourcing services.



Rich Matlus
Research VP

Mr. Matlus concentrates on helping clients with contract negotiations, the development of service levels, sourcing decisions and infrastructure outsourcing. Before working in the research area of Gartner, Mr. Matlus spent five years in Gartner Consulting, where he assisted clients with outsourcing engagements that included sourcing strategies, requests for proposal evaluations and contract negotiations.



Robert H. Brown
Principal Analyst Research

Mr. Brown is a principal analyst in Gartner Research, where he is responsible for Gartner's coverage of business process outsourcing (BPO) for North America. His specialization includes BPO vendor selection and global delivery capabilities, as well as outsourcing adoption among small and midsize businesses.



Philip Georgas
Research Director

Mr. Georgas' experience includes extensive work in sourcing and outsourcing evaluations for both end-user and service provider organizations. His expertise lies in cost/price benchmarking, performance management, service levels, sourcing management maturity, sourcing governance and relationship management. Mr. Georgas joined Gartner in 1989 and is based in the U.S.



Joseph Feiman
Research VP

Dr. Feiman's research in application development outsourcing and enterprise performance assessments earned him Gartner Thought Leadership Award for two consecutive years - 2003 and 2004. His background includes system and application programming, research and development, management and consulting.



Allie Young
Research VP

Ms. Young has contributed to IT services and outsourcing research for the past 10 years, monitoring key market trends, vendor strategies, user requirements, contract analysis and competitive issues, in addition to assuming responsibility for daily client care and consulting projects.



Partha Iyengar
Research VP

Mr. Iyengar has written thought-leading research on AD process capability and global AD issues, and has done extensive research in global delivery. He actively tracks the business models of the leading offshore services vendors from India and other emerging countries and their competitive positioning with the traditional global service providers.



Kimberly Harris-Ferrante
Research VP

Ms. Harris-Ferrante specializes in strategies and technologies in the P&C insurance sector for distribution, customer relationship management, exception-based underwriting, policy administration, claims management and administration, business process management, and infrastructure management and optimization. She is an active participant in Gartner's outsourcing research.



Arabella Hallawell
Research VP

Ms. Hallawell currently focuses on several security markets: Antivirus, spam and Web filtering, as well as e-mail security. Ms. Hallawell also assists companies in developing policies for compliance; acceptable use and cross-border data transfer issues.



Helen Huntley
Research VP

Ms. Huntley was formerly part of the Gartner Consulting Strategic Sourcing practice. In this position, she was responsible for the creation of appropriate approaches to solving clients' sourcing challenges, from the perspectives of both service recipient and service provider.

THE GLOBAL OUTSOURCING SERVICE PROVIDER LANDSCAPE FOR 2005 – 2006

Up until now, global service providers in the leading outsourcing countries have had a pretty smooth ride as corporate executives have proactively sought out outsourcing to lower costs.

However, this situation is unlikely to go on forever. Challenges are coming in from all sides as:

- **Emerging outsourcing countries make significant inroads into the marketplace.**
- **Multinational companies such as IBM and EDS develop their own delivery models.**
- **Competitive offshore providers move higher up the value chain – offering a whole map of services.**
- **The best employees of outsourcing firms are lured in-house by multinational firms.**
- **Increased legislation limits the kind of work that can be outsourced due to data privacy.**
- **Emerging workforce automation trends eventually lead to outsourcing obsolescence in some areas.**

On the flip side, there are new opportunities emerging as corporate executives go beyond mainstream outsourcing of application services to back office BPO and infrastructure.

These are the trends that CIOs and high-level corporate sourcing executives will be learning about firsthand from top Gartner sourcing analysts at the Global Sourcing Summit in November.

Global Service Providers can present to a guaranteed audience of these serious Decision-Makers at exclusive Case Study Presentations. The audience for private Case Study Presentations will be hand-selected by Gartner to match Global Service Providers with CIOs and sourcing executives in the market for their services.

Conducting Case Study Presentations allow Global Service Providers to establish a major presence among C-level executives who will be making 2006 outsourcing decisions.

**For more information on reserving your Case Study Presentation:
Call Tim Brooks at toll-free 866.877.7185
or 603.471.4205 or email tim.brooks@gartner.com**

The Gartner Difference

When you attend a Gartner conference, you have full access to the most respected IT research and advisory services in the world.

Gartner Facts:

- Over 1,000 research analysts and consultants in 75 locations worldwide
- We advise over 10,000 clients on technology and business strategy
- Our EXP program, exclusive to CIO's has over 2,000 members

Why Choose a Gartner event?

Keep in mind these statistics:

- More than 25,000 Decision-Makers attend Gartner events every year around the world
- 95% recommend the Gartner conference experience to their colleagues

Gartner events are the only global meeting points where you can get the full benefit of the depth and objectivity of Gartner Research. This invaluable resource will hone your competitive edge and help your company make the right strategic decisions in order to get the best value out of IT investments.

GET ACTIONABLE ADVICE ABOUT YOUR NEXT-GENERATION OUTSOURCING CHALLENGES:

- What are the real risk-adjusted cost savings of outsourcing?
- How can I effectively manage outsourcing deals?
- What's the deal on sending work to emerging outsourcing countries like China?
- Can I go beyond outsourcing applications - to whole business processes and infrastructure?

REGISTRATION INFORMATION: 2 WAYS TO PARTICIPATE / REGISTER

1) Complimentary Summit Travel Packages for Selected Global Sourcing Summit IT Executives

If you qualify, you will receive:

- Roundtrip airfare
- Deluxe hotel accommodations
- Meals and social functions
- Full Summit Registration, which includes: Case Study Presentations, One-on-One Meetings with Gartner Analysts and Technology Providers, access to Industry Insight Sessions and Keynote, admission to the Global Sourcing Pavilion and networking functions

To see if you qualify, complete the online survey at www.globalsourcingsummit.com/surveyform.html

Call: Dave Best 603.471.4266 Email: dave.best@gartner.com

2) Technology Provider

Purchase a Case Study Sponsorship package, and you will receive the following items in addition to your opportunity to present Case Study Presentations:

- One-on-One Gartner Analysts Meetings
- Attendance at Gartner Insight Sessions and Keynote
- Exhibit at the Global Sourcing Pavilion
- Access to networking functions

Call: Tim Brooks 603.471.4205 Email: tim.brooks@gartner.com

HOTEL INFORMATION



Hotel del Coronado
San Diego, California
Phone: 800.HOTELDEL or 619.435.6611

For additional hotel and conference information, please go to www.globalsourcingsummit.com

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