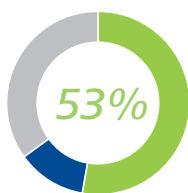


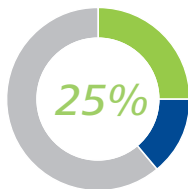
# Deloitte's 2014 Global Outsourcing and Insourcing Survey

## Outsourcing activity is expected to increase



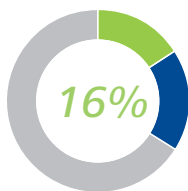
of respondents are currently outsourcing elements of their **IT function**

**26%** of respondents who do not outsource, plan to



of respondents are currently outsourcing **Real Estate and Facilities Management**

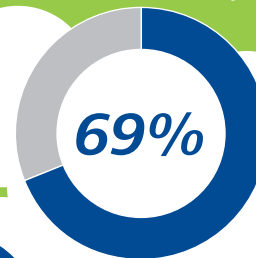
**19%** of respondents who do not outsource, plan to



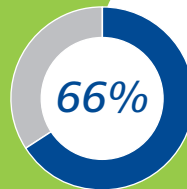
of respondents are currently outsourcing **HR functions**

**22%** of respondents who do not outsource, plan to

Technology advancements will likely **increase** outsourcing



of respondents are more likely to outsource due to **Cloud Computing**



of respondents are more likely to outsource due to **Business Process as a Service**

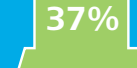


of respondents believe offshoring **will continue** unless legislation is enacted to limit it

Regulation, if enacted, will likely **decrease** outsourcing and offshoring



of respondents believe legislation **should be enacted** to curb offshoring



of respondents believe such legislation **will be enacted** locally




of those respondents believe the impact **will be significant**


40%

of respondents believe increased data privacy regulation will likely lead to a decrease in outsourcing


# Service provider strengths and opportunities



**79%** of respondents do **not** believe their service providers are too costly



**49%** of respondents are facing issues with vendors being reactive vs. proactive



**37%** of respondents are facing issues with lack of innovation


## Respondent profile

What is your organization's primary industry?




- 30% Consumer and industrial products
- 23% Financial services
- 16% Technology, media, and telecommunications
- 10% Professional services
- 8% Health care and life sciences
- 7% Energy and resources
- 6% Public sector

What are the revenues of your organization?



- 39% Less than \$1 billion
- 23% \$1 billion to \$5 billion
- 17% \$5 billion to \$15 billion
- 21% Greater than \$15 billion

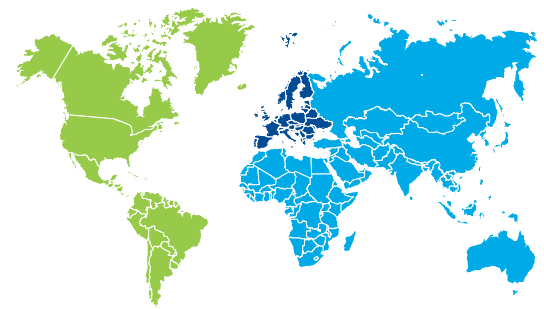
What is your organizations total employee count?



- 26% Fewer than 1,000
- 31% 1,000 to 10,000
- 18% 10,001 to 25,000
- 25% 25,001 to 100,000+

*Respondent organizations represent all major industries and include both single-country firms and multinational corporations.*

## Respondents by regions



**43%** Americas  
**30%** Europe  
**27%** Asia Australia Africa

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