



NTT

2021 Global Managed Services Report

Helping you thrive through change

Organizations have, and will continue to, broaden their **investments in digital transformation** in spite of the pandemic, not because of it.

Demand for unprecedented agility has **accelerated and adaptable technology services** have become ever more important.

Many brave businesses have gone beyond simply 'getting by'; they remain highly adaptable and open to new possibilities.

Explore our key data-driven insights

Building resilience

Unexpected events have caused many organizations to focus on becoming more resilient, often through cost optimization and greater efficiencies.

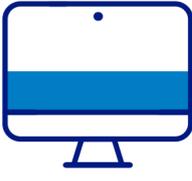
89.2%
agree COVID-19 has caused **significant changes to their operating processes.**



87.3%
agree it has **accelerated their digital transformation strategy.**

The bold and brave

Some organizations achieve resilience through bravery, boldness and ambition.



33.8%

have pivoted technology focus to take advantage of market opportunities or the ability to scale. This rises to **41.7%** for those who have at least three-quarters of their IT managed by third parties.

Organizations who consider service providers to be an important part of their technology strategy are much more likely to be successful and considered **leaders**.

Of those who think trusted service providers are not very important, or not at all important, only **2.0%** are leaders, while **62.0%** are laggards.



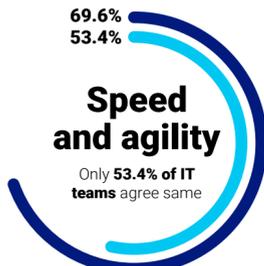
#1 business driver for **CEOs** in the coming **18 months** (outside of COVID-19) is **improving agility** and the business ability to **respond to change**.

Efficiency through stronger alignment

IT and business teams need to build a **better understanding of each other's priorities**, as well as the **speed and direction** in which both move.



69.6% of operational teams say business efficiency is crucial to the technology strategy. Yet only **48%** of IT teams say the same.



69.6% of operations teams see speed and agility as a key component of a technology strategy. **53.4%** of IT teams agree the same.

Partners critical to secure digitization advancement

Aligning priorities helps plug the gap across line of business silos.



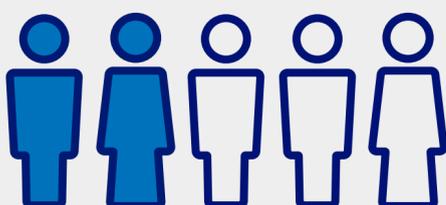
'**Improved security**' and '**improved system integration skills**' are two of the top three motivators for working with a service provider.



Organizations partnering with service providers for over half of their IT support are almost **50% more likely to have optimized their digital transformation**.

Present needs, future delivery – at speed

Organizations need to maintain the status quo, while investing in technology and process modernization to capture opportunities to scale and evolve.



Only two in five strongly believe they have the technology available to meet the organization's immediate objectives.

Organizations further advanced in digital transformation:



Spend more time on software development and developing new technologies and workflows to support evolving business objectives.



Allow more focus on vendor/contract management.

Five considerations

Bold, brave organizations rank service providers with these attributes to support them to meet their business outcomes:



Consulting-led approach



Innovation, not just optimization



Smart sourcing



Platform automation



Security

How does your organization compare?

Establish if your organization is bold and brave enough – take our assessment to find out how resilient you are.

About the Report:

1,350
interviews undertaken



across **21 countries** in **6 regions**



15 industry sectors

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