

Multisourcing on the Rise – Results from an Analysis of More Than 1,000 IT Outsourcing Deals in the ASG Region

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Abstract. Information technology outsourcing (ITO) has long been recognized for its numerous potential advantages such as lowering costs, accessing external skills, and improving efficiency, flexibility, and quality. However, it also exposes client companies to various risks, including vendor lock-in, poor agility, or insufficient vendor expertise in individual domains, especially in increasingly dynamic market environments. Consequently, companies increasingly implement multisourcing by composing a “best of breed” set of vendors for their various IT services. In this paper, we use a dataset of 1,016 ITO deals closed with Austrian, Swiss, and German client companies between 2006 and 2017 to analyze the development of the ITO market in general and multisourcing in particular. Our results show decreasing services run rates, shorter contract lengths, an increasing number of concurrent service providers per client, and a distribution of the total number of contracts to a larger set of vendors, all pointing towards an increasing popularity of multisourcing.

Keywords: IT Outsourcing, Sourcing Strategy, Multisourcing

1 Introduction

In the past three decades, Information Technology Outsourcing (ITO) has emerged as a critical component of corporate strategy. Several studies [1–6] have portrayed the potential value that arises from outsourcing corporate Information Technology (IT) services to an external party. Today, almost every Fortune 500 company and many large public institutions outsource significant parts of their IT services [7] and an entire global industry has evolved around ITO, with annual two-digit growth rates and an estimated market size totaling EUR 275 billion in 2015 [8].

However, on the flipside of ITO’s perceived advantages lie considerable challenges and risks. An indication of this are the surprisingly high failure rates for ITO projects, despite their long-term importance and the assumable high experience of both client and service provider organizations [9]. Correspondingly, a recent study revealed that around 60% of ITO projects were not able to meet all of their pre-defined targets [10]. One of the main risks in ITO is committing to a single main service provider for all IT

services because it can result in vendor lock-in [11]. Furthermore, given that there is no one company that is best-in-class for all services, it oftentimes also means settling for limited levels of competence or knowledge – at least in individual domains [12].

Hence, an increasing number of companies have transformed their *modus operandi* of ITO. Instead of relying on a single main service provider, they concurrently contract with a multitude of parties for IT projects and services in what is called “multisourcing” [13]. In doing so, they experience several advantages. First, by subdividing their IT services landscape into different tasks and sourcing them from different vendors, they can compose a set of “best of breed” vendors, i.e. contract with the perceived best supplier for a given service. Second, they are able to further lower costs due to increased levels of vendor competition. Third, closing smaller contracts for clearly delineated IT services allows for improved agility and adaptability. The organization can respond better and more flexibly to changes in the competitive environment by adding or replacing an individual service provider instead of having to reconfigure the whole large-scale outsourcing arrangement with a single vendor [11].

However, despite these advantages and the shift towards multisourcing that both academic and practice literature agree on [11, 14–22], there is a paucity of academic research on observed manifestations of sourcing strategy. Almost all articles on multisourcing that we identified make recourse on Bapna et al. (2010) when referring to empirical observations of IT sourcing strategy such as the length or size of contracts or the consideration of whether to employ single- or multisourcing [22].

Against this background, in this paper we examine key characteristics of ITO deals as observable manifestations of IT sourcing strategy. To this end, we analyze the development of the ITO market in the German-speaking countries (including Austria, Switzerland, and Germany, ASG). Using a dataset of more than 1,000 ITO deals that were closed in the timespan of the last 11.5 years (January 2006 – August 2017), we employ an empirical descriptive-interpretive approach to quantitatively analyze key characteristics of ITO contracts as aspects of IT sourcing strategy. We thereby seek to answer the following research question:

Which characteristics does the recent development of the ITO market in Austria, Switzerland, and Germany show, particularly with regard to multisourcing?

In doing so, we proceed as follows. First, we provide an overview of the research context in the following section 2, before outlining our research method and describing key characteristics of our dataset in section 3. The subsequent section 4 contains our findings regarding ITO multisourcing that we discuss in section 5. We then conclude with a summary, a discussion of limitations, and an outline of future research opportunities in section 6.

2 Research context

Sourcing strategies employing multiple main service providers have been extensively studied in ITO and for other business processes, particularly in manufacturing

operations [13, 14]. In the context of ITO, multisourcing typically refers to “the delegation of IT and IT-enabled services to multiple vendors, who must work collaboratively to deliver services to a client organization” [22].

Compared to single-sourcing arrangements, multisourcing offers several benefits. It is believed to reduce the level of operational and strategic risk due to lower vendor dependency, to facilitate higher IT service quality due to a best-of-breed setup of vendors with complementary competencies, and to lead to lower IT costs due to higher levels of service provider competition [12, 23, 24].

However, there are many other risks of outsourcing that multisourcing does not address, such as service debasement or performance risks. Furthermore, there are also several additional pitfalls to pursuing a multisourcing strategy. First, reducing the extent of IT services that are obtained from a provider decreases this provider’s incentive to make client-specific investments, e.g. into knowledge or technology, that are relevant to the particular client firm. Second, also the client firm will tend to invest less into the relationship with any service provider which may reduce relationship quality. Third, managing multiple, inherently interdependent relationships is significantly more complex in terms of contracting, coordination, and governance, leading to increased management overhead and transaction costs [22]. Consequently, extant literature has stressed that the proper management of multisourcing projects is critical to their success [25–27].

In recent years, both practical and academic literature has identified a constant shift towards multisourcing. Consultancies like Accenture, Capgemini, and service providers like Dimension Data all acknowledge the increasing importance of multisourcing in the ITO environment and offer guidelines on how to setup and manage a sourcing arrangement consisting of multiple service providers [15, 16, 28]. On the academic side, Bapna et al. (2010) analyzed the “IDC services contracts database” with ITO contracts from all over the world from 1996 to 2008. They found multisourcing “to be growing significantly” [22], both in terms of number of contracts (less than 10 known deals worldwide until 2001 to more than 60 in 2007) as well as in terms of average contract value. Similarly, Su and Levina (2011) report that “organizations tend to engage in outsourcing contracts of smaller scale [each], but with a larger number of suppliers” [14].

3 Research method

3.1 Data triangulation and analysis approach

International Data Corporation (IDC) is a “global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets” [29]. Founded in 1964 and headquartered in Framingham, Massachusetts, USA, IDC is a wholly owned subsidiary of the International Data Group (IDG), a leading media, data, and marketing services company. IDG’s brands include renowned publications such as CIO, Computerworld, PCWorld, and Macworld.

Our dataset is a subset of IDC's "BuyerPulse Deals Database" which in total contains data on more than 32,000 ITO and Business Process Outsourcing (BPO) contracts worldwide. IDC employs a variety of primary and secondary sources for compiling data on ITO/BPO deals, including press releases, public financial records, historic market data, and third-party media reports. It complements these data points through interviews with IT service providers to yield more contextual information on specific deals.

We examined ITO deals in German-speaking countries, i.e. all observed ITO contracts that were closed between Austrian, Swiss, or German client firms and both national and international service providers. IDC's dataset contains 1,016 observed ITO deals from the past 11.5 years (from January 2006 to the cutoff point, 31 August 2017).

We triangulated the data contained in IDC's "BuyerPulse Deals Database" by manually searching the web for publicly available information on ITO deals, predominantly on German professional IT news websites such as cio.de and computerwoche.de, as well as pressebox.de for press releases. We found information on 229 ITO deals since 2008, i.e. only 22.5% of IDC's scope. 129 or 56% of the deals that we identified were also contained in the IDC database; the remaining 100 deals had not been observed by IDC. Still, while IDC's dataset is missing some of the smaller deals, e.g. of small and medium-sized businesses, the data contains almost every large deal with contract values of at least EUR 100 million that we identified. Moreover, it also includes information on commercial terms raised from interviews and industry analyses – data that is hardly made public and which we did not find for most deals in our triangulation effort. Hence, we chose not to enrich the IDC dataset with our data and instead to keep with IDC's database for the sake of a consistently raised and compiled data source to analyze.

We divided our analysis into three parts: First, the descriptive analyses of client characteristics (section 3.2), second, a closer look at contract characteristics, and third, the most salient market developments and relationships between variables within the same group or in different groups. We will first present the main characteristics of our dataset, before discussing market developments and relationships.

3.2 Dataset characteristics

In describing our dataset, we looked at four client characteristics, namely client country (a), client industry sector (b), number of employees (c), and client revenue (d).

(a) Of the 1,016 observed ITO contracts, 703 or 69% were closed with German client companies, 250 (25%) with Swiss clients, and 63 (6%) with Austrian companies.

(b) Our dataset contains client data from a multitude of different industry sectors. 156 ITO deals (15%) were closed with clients in the discrete manufacturing industry, 130 deals (13%) with professional services client companies, 115 deals (11%) with public sector/government institutions, 111 deals (11%) with banking clients, and 101 (10%) with insurance companies. 94 ITO deals (9%) were sealed with companies from the process manufacturing sector, 51 deals (5%) with transportation companies, 44 deals (4%) with retail trade organizations, and 39 deals (4%) with clients from the communication and media sector. The remaining 173 deals (18%) were closed with companies from eight other industry sectors.

(c) The dataset is similarly diverse regarding client size. 329 contracts (32%) were closed with clients with less than 1,000 employees, 313 contracts (31%) with clients with 1,000 - 9,999 employees, and 306 contracts (30%) with clients employing at least 10,000 staff. The size of clients closing the remaining 68 deals (7%) was unknown.

(d) A similar picture is presented in terms of client revenue: 465 deals (46%) were closed with clients that have revenues of up to EUR 1 billion, 211 deals (21%) with clients between EUR 1 billion and 10 billion, and 224 deals (22%) with clients grossing EUR 10 billion and more. The revenue of 116 client companies (11%) was unknown. Figure 1 summarizes the key client characteristics of ITO deals contained in our dataset.

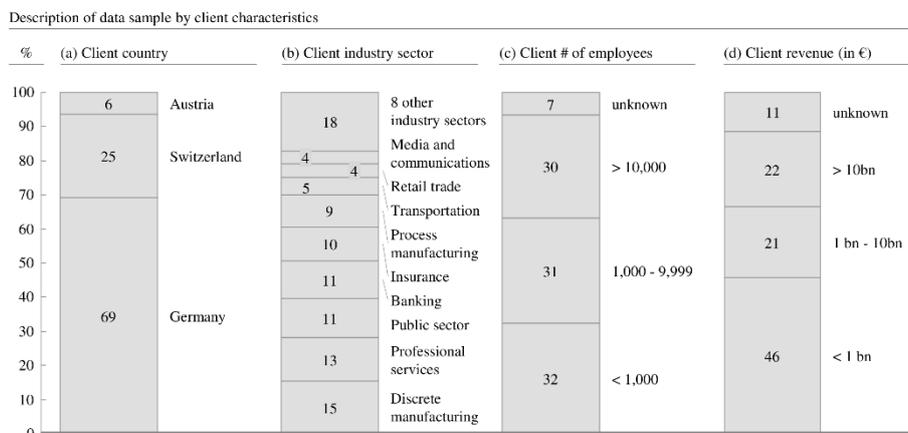


Figure 1. Description of data sample by client characteristics

We also examined four contract characteristics, namely the ITO engagement type (a), contract type (b), price methodology (c), and bid type (d).

(a) The IDC database discerns three types of ITO engagement types. Network and Endpoint Outsourcing Services (NEOS) involves “the support and management of one or more elements of the client/server and network communications infrastructure of an organization”. Application Outsourcing (AO) includes services designed to provide for the day-to-day operations, support, development, customization, implementation and integration, as well as maintenance of enterprise applications, and end-user support. IT Outsourcing (ITO) involves “long-term, contractual arrangement[s] in which a service provider takes ownership of and responsibility for managing all or part of a client's IS infrastructure and operations based on a service-level agreement” [34]. 413 deals (41%) in our dataset were AO, 361 (35%) classified as ITO deals, and 242 deals (24%) concerned NEOS.

(b) In terms of contract type, we distinguish between new contracts, contract extensions, contract expansions, a combined extension and expansion, and a contract renegotiation. In our dataset, we found 820 new contracts (81%), 150 extensions (15%), and 38 expansions (4%). 8 contracts (<1%) were of a different type, thereof 4 combined extension and expansion deals, 2 renegotiations, and 2 deals of unknown contract type.

(c) Regarding pricing, a distinction can be made between fixed price and variable pricing which includes consumption-based or on-demand pricing. 525 deals (52%) in

our dataset were fixed-price contracts, and 446 deals (44%) a combination of fixed and variable pricing. The remaining 45 deals (4%) relate to the other pricing methods.

(d) Concerning the employed bid type, 802 of our deals (79%) were closed after a competitive tender, whereas 125 deals (12%) had been closed non-competitively. For 89 deals (9%), the bid type was not disclosed. Interestingly, over time, a decreasing share of contracts are closed non-competitively. While 19% to 26% of deals between 2008 and 2010 were non-competitive, their share declined to a mere 2 to 8% between 2014 and 2016. Figure 2 illustrates the four contract characteristics.

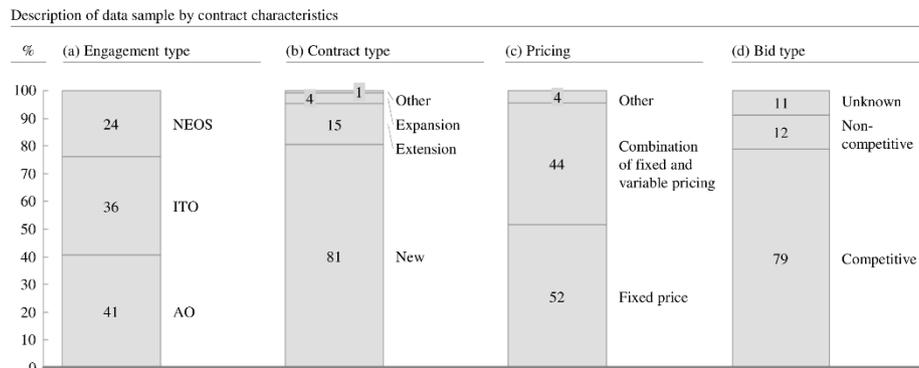


Figure 2. Description of data sample by contract characteristics

4 Findings

We analyzed the behavior of some key contract characteristics that qualify as indicators for the development of ITO sourcing strategy in general, namely the distribution of contract start dates, i.e. the number of contracts starting per year (a), the total contract value (b), average contract duration (c), and average services run rate (d).

(a) The number of observed ITO contracts increased from 2006 to a peak in 2012 (155 observed contracts per year) and has been decreasing ever since (see Figure 3). Reasons for the peak in 2011/12 supposedly included more frequent ITO activities to reduce IT cost as a reaction on the financial crisis that started in 2007 and put companies under financial pressure over the next couple of years [30–32]. The two contracts starting in 2018 have already been announced and are therefore included in this set.

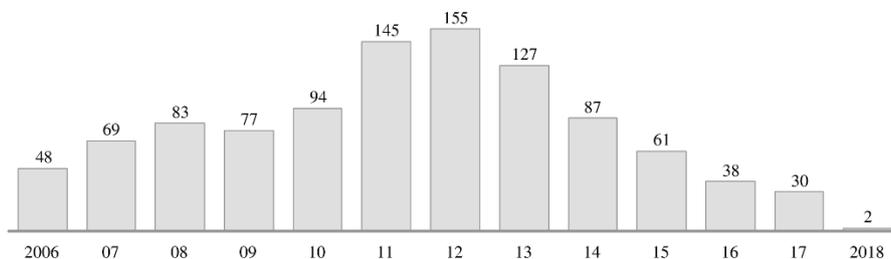


Figure 3. Number of observed newly-closed ITO deals over time (by start date)

(b) Of the 1,016 observed ITO deals, 503 deals (50%) have a value of less than EUR 10 million, and another 387 deals (38%) lie below EUR 100 million. 71 deals (7%) have a value between EUR 100 and 250 million, and another 55 contracts (5%) amount to more than EUR 250 million. Of those, 12 so-called “mega deals” have a value of more than EUR 1 billion. While only representing a mere 1% of deals, however, these “mega deals” account for 45% of the total contract value of all ITO contracts (EUR 80 billion). The median contract value of all contracts is EUR 10 million, while an average “mega deal” is worth EUR 3 billion.

(c) The contract length has declined in the last ten years, from a 3-year average of 52.3 months for contracts closed between 2006-08, to an average 50.6 months between 2015-17 (after Winsoring at 5th and 95th percentile).

(d) Similarly, the average run rate, i.e. the total contract value divided by contract length in years, has also been in decline for the major part of the last ten years, from an absolute high of EUR 19.3 million in 2007 to EUR 9 million in 2017 (excluding mega deals). Figure 4 illustrates findings (b) to (d).

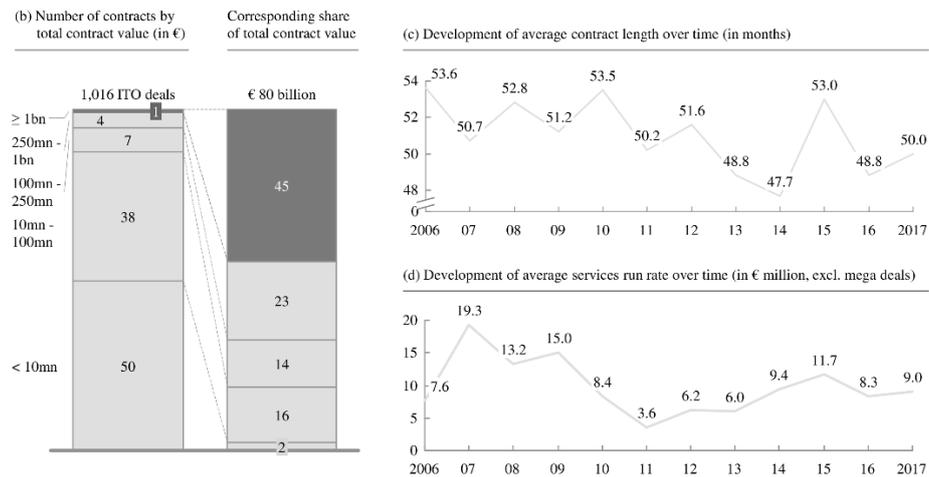


Figure 4. Number of contracts by total contract value and their share of total contract value; development of average contract length and average services run rate over time

Regarding market structure and vendor competition, we found that the top 10 vendors (with Deutsche Telekom, Atos, and IBM leading the list) account for 523 of the 1,016 ITO deals (51%). However, the share of contracts that top 10 vendors of each respective year are able to capture is in decline, from 83% in 2006 to a mere 50% in 2017, pointing to increasing market diversification in the ASG region (see Figure 5).

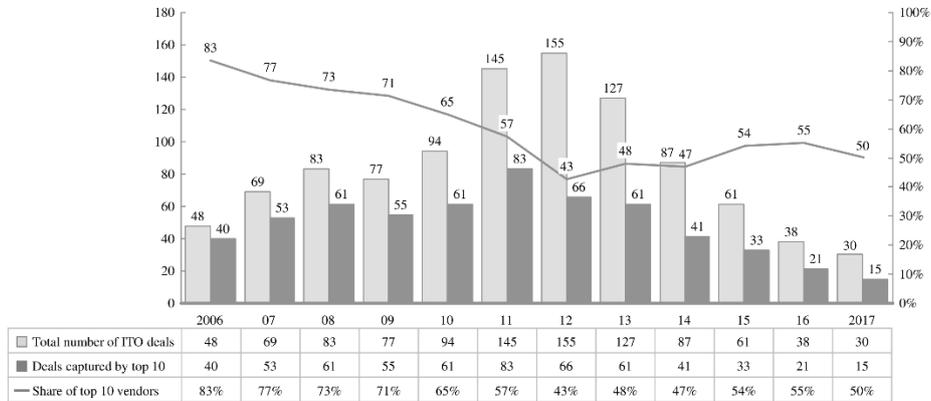


Figure 5. Absolute number and relative share of ITO contracts closed with top 10 vendors

Similarly, on a more granular level, multisourcing and frequent vendor switching already seem to be the norm for customers. The number of concurrently contracted service providers per client has increased from 1.02 different providers per client in 2006 to 1.34 in 2017 (see Figure 6). One public service institution, for example, closed 25 ITO contracts with 16 distinct providers during the last ten years. Similarly, a large European airline closed 17 contracts with 10 vendors, and a German conglomerate company had 17 agreements with 12 partners.

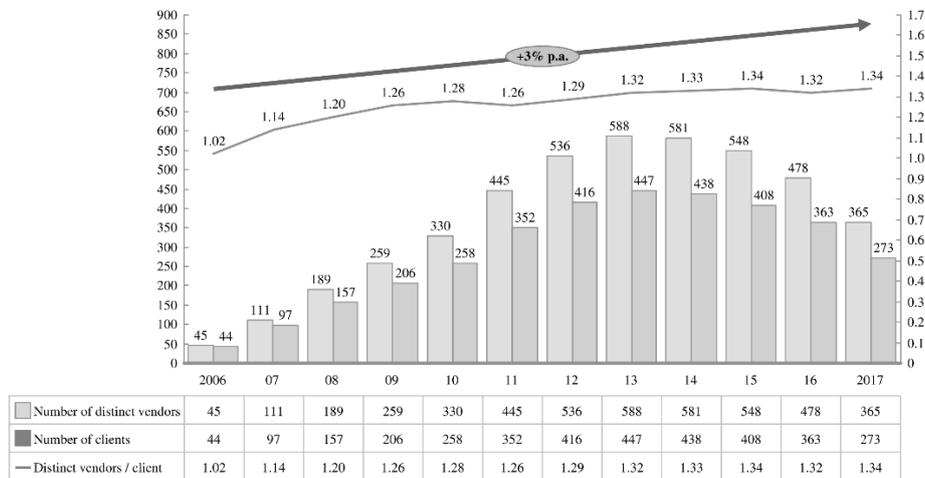


Figure 6. Development of number of distinct concurrent vendors per client

5 Discussion

Our findings give an impression of the state of the ITO market in the ASG region and the underlying developments of IT sourcing strategy. Regarding our research questions,

we want to point out three important developments. First, the market appears to become even more competitive. The share of contracts that are closed after competitive bidding has increased from around 75% between 2008 and 2010 to over 90% today. Similarly, the share of contracts that the top 10 vendors of each year are able to capture has declined from around 75% between 2006 and 2009 to around 50% in the last couple of years. Second, companies prefer shorter and less extensive ITO contracts. This is apparent from the average contract duration and average services run rate that have both been in decline for most of the last ten years. The average contract closed between 2015 and 2017 is around 50.6 months long (compared to 52.3 months between 2006 and 2008) and has a run rate of around EUR 9 million per year, down from EUR 13.2-19.3 million between 2007 and 2009. This confirms the finding of Bapna et al. (2010) who already found “recent outsourcing arrangements [to] involve several vendors and typically run over a shorter time span” [22].

Third, clients are contracting with more service providers than ten years ago. Our dataset contains an average of 1.34 service providers that any given client company has ongoing contracts with in 2017. While the real number will clearly lie above this rate and the dataset does not allow for more insights about the specific setup and division of work within the multisourcing arrangements, it still gives an indication of the market’s direction. The increasing number of concurrent providers confirms earlier findings by Su and Levina (2011) [14] and reaffirms the requirement for additional cooperation and governance to handle multi-vendor settings [15, 16, 22, 24, 28].

Taken together, our findings confirm the continuing trend towards multisourcing also in the ASG region which Bapna et al. already saw globally in 2010 [22]. Given the particularly strict layoff regulations that make it very costly to lay off workers in the process of outsourcing work, it seems reasonable to see German companies react with a certain time delay [33, 34]. This is also observable in the increasing number of ITO deals around 2011/12 as a reaction to the financial crisis that started in the US in 2007.

As our analyses indicate, more and more client companies in the ASG region choose to abandon the concept of engaging one main service provider for all of their IT, and instead also contract with smaller and more specialized companies over a smaller set of tasks. They enter into less expensive and shorter relationships with multiple main service providers and benefit from high levels of domain expertise, decreased risk of vendor lock-in, and higher flexibility. These advantages benefit companies in a market environment that grows increasingly competitive and puts a higher emphasis on IT solutions than ever before. As digitalization continues to impact more and more businesses, IT constitutes an integral cornerstone of many modern business models. In response to this development, companies will further need to adapt their IT sourcing strategy and put more emphasis on selectively outsourcing IT services or building more competencies in-house to remain competitive or develop competitive advantages in IT.

Despite this development towards smaller and shorter ITO relationships with specialized vendors, however, so-called “mega deals” still constitute a high share of the market. A mere 12 of these deals account for almost half of the ITO market volume. Therefore, while service providers might want to strengthen their competencies to compete over smaller and shorter contracts with new competitors, one of their key interests certainly continues to lie in the large multi-billion Euro deals.

6 Conclusion

In this paper, we explored the current state of the ITO market in the ASG region. Employing quantitative analyses of a dataset of 1,016 ITO deals, we found that ITO contracts have become shorter, less comprehensive in terms of monetary value, and are divided between a larger number of service providers. Moreover, client firms seem to contract with more service providers simultaneously and are also reaching out to smaller and medium-sized companies. We argue that our findings point to longer-term changes in the outsourcing market and further confirm the trend towards multisourcing strategies which is widely acknowledged in practical and academic literature.

7 Limitations and avenues for further research

There are several limitations to our research, mainly due to the fact that, while IDC's database contains a multitude of data points, it is not complete. First, IDC relies on publicly available information on ITO contracts. However, service providers, client firms, and media outlets tend to report more on large-scale ITO projects than the many small contracts that are also closed but not announced. Thus, most ITO deals are never made public and, consequently, cannot be recorded in IDC's database. Furthermore, ITO contracts of large institutions are more often made public. Therefore, the database is subject to a certain unavoidable systematic sampling error and biased towards larger ITO deals. Second, many ITO deals from the ASG region are only announced in German press releases. Therefore, there is an increased chance of them missing in the database of an US-American market research institute like IDC. All in all, IDC suggests their database contains around 10% of all ITO contracts. Given the set is biased towards larger deals, the institute estimates they represent 20% of combined contract value. While we believe the majority of "mega deals" to be included in our sample, we cannot assume the same for smaller contracts. However, our dataset represents the best perspective currently available on the market as our data triangulation effort showed.

We see two main possibilities for further research. First, addressing this study's focus on the ASG region, an inspection of worldwide ITO deal data promises valuable insights. Comparing them with our findings as well as earlier publications on ITO market development could unveil previously unknown or confirm assumed peculiarities of individual regions, or at least give us an idea of global market developments. Second, as discussed above, we strongly believe that digitalization influences IT sourcing strategy, as companies are increasingly reliant on world-class IT competencies to remain competitive. To explore and understand this link in detail, we consider it necessary to conduct further qualitative in-depth studies.

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