



2009

Green Outsourcing Survey

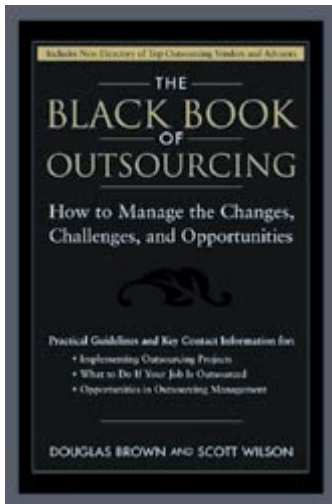
Each year, Brown-Wilson Group and Black Book Research undertakes an annual survey of outsourcing service providers' pro-environmental initiatives from the perspective of their client experience.

These research results are recognized as the most extensive and representative perception study of outsourcing vendors, validated by 1,338 unique company respondents from service users around the globe between January 1 and March 1. Over 7,000 individual nominations were received during the survey. The Black Book survey web instrument is open to respondents and new participants each year at

<http://TheBlackBookOfOutsourcing.com>

Available wherever books are sold, The Black Book is available in five languages as well as in print, digital and audio formats.

With over twenty print runs of the first edition, The Black Book was re-released in an updated 2009 this year format by Wiley Publishers.



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Introduction

There's a fundamental truth to understanding and improving any aspect of a company's performance – if you can't measure it, you can't manage it. That applies to sustainability, as well. The 2009 Black Book Top Green Outsourcing Vendors Survey of outsourcing buyer CIOs, governance, buyers, user managers & corporate executives uncovered both the progress of some suppliers and disappointments too.

Black Book's 2008 Green Outsourcing survey stating that 62 percent of large American corporations have established detailed green IT data center strategies including outsourcing vendor expectations; 54 percent had set policies for non-IT services delivered through ancillary outsourcing vendors; but 88 percent are not entirely sure what constitutes achieving true sustainability. Not much has changed in a year. Half of 1338 companies responding to this Black Book Research survey from January to March 2009 said they consider green criteria during their IT-procurement process, and four out of five have recycling programs. However, energy costs and reputation impact are still the drivers of choosing a vendor with green options.

Green has secured a major role of the IT outsourcing decision making and vendor selection process, and competing suppliers are peddling green credentials.

The financial results of several sustainability-focused outsourcers and consultants have revealed indications that defend the assertion that outsourcing corporations can do well by doing good. Global technology vendors have demonstrated the power of distinguishing their brands, services and reputations as environmentally, socially and economically responsible for the entire planet. With nearly 90% of buyer CIO's and executives confused by what is needed and what is fluff, most note that there are no funds budgeted in 2009 or 2010 to pay more for outsourcing suppliers' green add-ons. The expectation is the outsourcer will deliver such green efforts as value-adds only by 89 percent of survey takers, up seven percent from last year.

Outsourcers that not only preach, but practice measurable environmental, social and economic responsibility have enjoyed considerable

fiscal returns on their investments. Others have yet to collect enough data to determine how sizeable their efforts are on the bottom-line or the societies that operate in. Sustainability is driven by customer demands report 98 percent of CIOs (up 4% from last year) who assert that their vendors are reacting only to clients, not love of mother earth. The price of energy sends more business to outsourcers than their green credentials confirm 85 percent of CxO's.

Among the most thought-provoking finds in the Black Book 2009 Green (or Sustainability) Survey:

- ▶ Competitive Indian IT outsourcing vendors have moved beyond sustainability demands as necessary costs of doing offshore business and are implementing innovative, tangible Green alternatives.
- ▶ Major US and Indian outsourcing vendors are more commonly adding new revenue streams through sustainability options.
- ▶ The reputational risks from contributing excessively to environmental waste and greenhouse gases are shifted to outsourcers with far less concern as outsourcers demonstrate green operations.
- ▶ Despite the magnitude of the triple bottom line, customers do not expect to pay more for green IT until the global economy is in recovery.
- ▶ Six of seven corporate officers claim the adoption of green technology is more likely a result of escalating energy costs than ecological altruism.
- ▶ 92% of respondents believe the vendors who have initiated green options for clients in the economic downturn will mature products and services that will be the highest in demand in 2010 – 2011
- ▶ Users are doubtful about the comprehensive and impact quality of outsourcing green programs but without standards to measure outcomes and energy prices high, 87% of clients are taking a “mostly passive” approach to monitoring vendors, as long as costs are stabilized and a green program is drafted.

Outsourcing vendors are not entirely to blame. As with all major initiatives, the environmental agenda has had a rocky ride up until relatively recently. Without clear, adoptable standards to measure, it is difficult to demand adherence as the target is moving.

Increasing energy costs, growth in computational demands, and the pain associated with facility expansion (space, power, cooling) will drive business cases supporting technology modernization — with Green IT becoming a very important factor in total cost of ownership (TCO). Data centers now use 1.5 percent of the gross domestic power output. This financial emphasis drives a broad range of best practices in the design, implementation and operation of both data centers and IT infrastructures. Cooling equipment and stable power sources are significant operating costs in the data center life cycle.

Green IT will require a holistic perspective, shaped by both the realities of the business opportunities and the regulatory environment. These in turn will necessitate a comprehensive look at opportunities to reduce TCO. A wide range of innovative solutions are likely to be implemented, involving:

Due Diligence	Hot Aisle / Cold Aisle
Regulatory Analysis	Cabinet Blanking Panels
Carbon Trends	Matching server air flows
Energy Forecasts	Eliminate gaps in rows
Site Selection	Use longer rows
ISO 14000 Certification	AC unit orientation
ROI Analysis	Server Consolidation
Facility Design	UN Global Compact Principles
Green Buildings	Blade Servers
Prime Power	Virtualization
UPS/Secondary Power	Optimized Storage Strategies
Cooling Strategy	SAN
Co-Generation	Six Sigma Strategies for Green
Energy Reduction Programs	Data De-Duplication
Management Tools	Desktop Environment
Active Power Management	Thick Clients / Thin Clients
Efficient Computer Design	Water Efficiency
Compound Fluid Dynamics	Atmosphere Protection
LEED Building Standards	Materials & Resources

Going green is a philosophical commitment that is gaining momentum. It is important for each organization to commit to a forward-directed and fully integrated business process that includes achieving social goals. It may be difficult to define, and the IT outsourcing community may struggle with the best ways to implement it, but Green IT is a key area of concern for global customers. It's also good business.

How do outsourcers achieve sustained economic growth, social progress and environmental protection simultaneously?

Socially responsible investment, which is made on the basis of social, environmental and ethical criteria, along with financial performance, referred to as the Triple Bottom line.

Triple bottom line sustainable development seeks to ensure that current economic, environmental and social activity does not adversely affect the potential for future generations to meet their needs.

While the program focuses upon environmental performance, this is set within the economic and social activities of an organization.

What does the Triple Bottom Line look like?

Economic gains: jobs created; small businesses started or expanded; environmentally responsible industries engaged; poverty reduced or alleviated.

Social improvements: people of color or low-wealth engaged; educational systems improved; racism dismantled; power shared.

Environmental stewardship: land/water resources protected; working lands locally-owned; water quality improved; native plants and herbs propagated.



Survey Summary

For all the undeniable benefits of the information-technology revolution, it comes at a cost, or costs.

Percentages in **bold green text** show improvements from last year.

Outsourcing Buyers	2009	2008
Vendor is not Delivering on Promised Green Initiatives	82%	93%
Vendor has Met, Superseded Expectations	17%	18%
Vendor Has not made any substantial improvements in Green Initiatives since last year	14%	19%

The first is energy: as data centers consume electricity which in turn exacts a high environmental price. With IT serving as an underappreciated but sizable contributor to corporate America's collective carbon footprint, budget concerns in a challenging economy have shifted priorities.

Outsourcing Buyers' Top Priority	2009	2008	2007
Budget Cuts/Financial	96%	61%	59%
Go Green for Environmental Reasons	8%	26%	24%
Outsourcing to Control Energy Costs	84%	12%	18%

In light of the economic challenges ahead for CIO's and Outsourcing Governance executives through 2010, nine out of ten expect changes in IT and outsourcing spending.

Outsourcing Buyers' Response to Financial Challenges of 2009-10	2009	2008
Must Negotiate Lower Rates with Outsourcers	90%	70%
Already cut internal spending to core	39%	16%
Seeking no-expense Sustainability guarantees in renegotiations with vendors	83%	90%

Altruism is NOT in Outsourcing Vendor's Top Five Motivations for Going Green

Additionally, among 460 outsourcing tech operations leaders globally, the majority expressed sustainability initiatives as necessary but not necessarily "front burner" issues.

MOTIVATION FOR CARRYING OUT GREEN INITIATIVES

1. High Energy Costs **97%** (89% in 2008)
2. Public Opinion **64%** (81% in 2008)
3. Client Demand **31%** (47% in 2008)
4. Corporate Viability **22%** (28% in 2008)
5. New Business Development **24%** (14% in 2008)

One in four respondents indicated that they were 'very concerned' about their company's environmental impact, compared with 24 percent last year and 62 percent in 2007.

A total of 7 percent admitted that they were 'not concerned' about their company's environmental impact, compared with 12 percent in the 2008 survey and 10 percent in 2007.

VENDORS & BUYERS: GETTING INTO SYNCH

SUSTAINABILITY ON THE OUTSOURCING FIRM'S RADAR OF CONCERN

Tech Outsourcing Operations Focus	2009	2008	2007
Very Concerned	25%	24%	62%
Concerned	73%	61%	33%
Not Concerned	1%	12%	1%

SUSTAINABILITY ON THE OUTSOURCING BUYERS' RADAR OF CONCERN

Outsourcing Buyers	2009	2008	2007
Very Concerned	72%	87%	73%
Concerned	28%	9%	24%
Not Concerned	-	1%	1%

TRUSTING OUTSOURCING VENDORS TO BE ACCOUNTABLE FOR SUSTAINABILITY

Outsourcing Buyers	2009	2008	2007
Fully Trusting	84%	35%	65%
Partnership Roles	11%	29%	21%
Not Trusting Vendor	5%	32%	14%

Outsourcing Buyers	2009	2008	2007
Over Trusted Vendors in Addressing Carbon Footprints of Clients	65%	88%	16%

If complacency has set-in, it is imperative that this does not continue because IT professionals need to ensure that their IT strategies are closely aligned with their organizations' green agendas.



Green Outsourcing Trends

Most respondents believe that more needs to be done to persuade companies to reduce their negative impact on the environment through responsible outsourcers, but there are mixed ideas about the type of measures required, particularly government mandates.

How Should Governments Be Involved:	2009	2008	2007
VENDORS OPINION			
Financial Incentives	90%	88%	54%
Sustainability Education	6%	8%	39%
Legislation	-	1%	1%
All Three	4%	1%	2%

How Should Governments Be Involved:	2009	2008	2007
BUYERS OPINION			
Financial Incentives	78%	10%	8%
Sustainability Education	11%	69%	55%
Legislation	2%	16%	27%
All Three	9%	4%	7%

A steep increase for financial incentives and decrease for legislation reflects the mood of all commerce, in general, at this time in the economic recovery.

More believe legislation on buyers would encourage outsourcing suppliers to become more eco-friendly as a matter of business survival.

Outsourcing users are highly confused by vendor as the industry changes its focus to environmentally friendly IT or processes without regulations or standards.

The outsourcing industry is saturated with *green speak* of which the majority is deemed just hype by user CIO's and vendor sales people. Both vendors and users continue in a stage of confusion about where and when they should invest their time and money.

LACK OF COMMON ECO-STANDARDS

Lack of Global Standards & Regulations Allows Outsourcing Vendors to Dodge Environmental Accountability	2009 Operations Executives	2008 Operations Executives
Outsourcing Vendors	80%	87%
Outsourcing Buyers/Clients	91%	75%

Global regulation is further clouding the issue, with vendors claiming that their products and outsourced services will help with compliance, although such standards are still anyone's guess.

GREEN FATIGUE

Polar bears and rainforests seem to be losing public interest as the economy becomes more and more challenging and job growth declining. Still, outsourcing users are united on having lost patience with outsourcer response to partnering with them at solving immediate data center issues such as cooling, virtualization, server efficiency and the management of energy.

Grown Impatient with Lack of Outsourcing Vendor Response & Green Innovation	2009	2008	2007
CIO's of Outsourcing Users/Buyers	82%	100%	68%
Operations Executives of Outsourcing Companies	77%	69%	55%

COMPETITIVE INDIAN OUTSOURCERS STEP UP

Outsourcing buyers appear to have become more tolerant with the lack of green initiatives, while outsourcing vendors have begun to respond with tangible solutions.

LEAST RESPONSIVE TO GREEN MOVEMENT		
Region	2009	2008
Mexico	2%	19%
Russia	3%	4%
China	7%	3%
Philippines	8%	2%
Brazil	9%	12%

POLICING GREEN NOT A PRIORITY

MOST RESPONSIVE TO GREEN MOVEMENT		
Region	2009	2008
Sweden	93%	69%
United States	77%	83%
UK	74%	80%
Canada	52%	63%
India	33%	13%

Are You Policing Your Current Sustainability Clauses	Yes	Imposed Penalties	Plan to in Increase Vigilance in 2010
Clients of Tech Outsourcing Services	12%	11%	33%
Clients of Ancillary Managed Services	6%	<1%	7%

Buyer Opinion: VENDOR is Responsible for Long Term Leadership	Users	US/UK Vendors	Offshore Vendors
Carbon Trading	100%	91%	16%
Software Efficiency	70%	90%	82%
Green Building	92%	94%	52%
Green Legislation	32%	14%	1%

WHO LEADS & WHO PAYS?

92 percent of US and 96 percent of UK organizations have no specific budget for green changes in 2010 (about the same as 2008-2009 despite anticipation of higher IT costs for demanded green options).

In response to a world supposedly consumed by environmental concerns, many outsourcing companies have made claims about their green credentials. However, the reality in the technology department is far less encouraging. As accountability and transparency issues within the offshore outsourcing industry were spotlighted in Q1 2009, many CIOs demanded the manifested proofs of vendor's green initiatives.

Upon careful determination, clients were made aware of which vendors offer green policy and advocacy through lip service, and which vendors had actual environmentally-friendly technology offerings.

GREEN OUTSOURCING	US & UK VENDORS	OFFSHORE VENDORS
Failed to Adopt Formal Green Policy in 2008	32%	94%
Failed to Apportion Needed Budget Funds to Green for 2009	86%	98%
Likely will not Budgeted Increases for Green Tech or Outsourcing Initiatives for 2010	56%	88%

As the energy efficiency movement is relatively new for the outsourcing vendor, there's been no funding allotted but substantially more offshore corporate leaders are moving off the learning curve to real green activities.

VENDOR-CLIENT LOYALTY

Clients are more likely to lift and shift outsourced IT initiatives between offshore vendors to obtain cheaper rates that include green alternatives.

Without cost savings, clients are unlikely to move IT operations back to home shore vendors or radically back in house just to acquire green options.

Shifting among offshore vendors clients is likely If no-cost green options are not added to outsourcer's portfolio of service offerings while pricing must decrease.

How Loyal are you to your current vendor when considering economy, need for rate cuts and increased demand for value added green initiatives?	Considering Changing Vendor
Would Move Project to Another Offshore Vendor for Lower Rates + Free Green Options + Maintained Service Levels	93%
Would Move Project to a Home Shore or Near Shore Vendor only for hard to find Green Options (rates may be higher)	8%
Move Project to Home Shore Vendors for Lower Rates + Green Options + Maintained Service Levels	98%
Will Stay with Current Vendors at Current Rates and possibly Pay More for Green Options to remain loyal	15%

MAJOR OUTSOURCING BUYERS ORGANIZATIONS DEMAND SUSTAINABILITY PARTNERS

IT data centers are the focal point for bringing real contributions to the financial and ethical bottom line. About 83 percent of US & UK companies that purchase IT outsourcing functions have established detailed strategies for their data centers to be more energy efficient, according to the Black Book survey including CIO's, at 100 companies with at least US\$1 B.

GREEN IS MAJOR PART OF VENDOR SELECTION IN 2009-2010	EQUIPMENT	OUTSOURCED SERVICES
US	98%	72%
UK	87%	61%
JAPAN	100%	67%

Over 98 percent of those surveyed said their green strategy will become an important factor in vendor selection over the next two years, particularly in the US and Japan.

CIO's expect their vendors to include design changes in new data centers, and also operational changes and other modifications in existing ones. While companies are becoming increasingly aware of their carbon footprints, business decisions are still being made with monetary concerns at their core.

Most Important in Vendor Selection (%)	Green	Cost	Performance
US	5%	71%	23%
France	8%	54%	36%
UK	2%	79%	18%
Germany	3%	45%	51%

US, French, UK and German outsourcing buyers are becoming more and more aware of green issues and are driving the vendors to add sustainability value to its customers. However, in 2009, all four regions' CIOs placed less importance on Green and more on costs.

OFFSHORE VENDORS TAKING LEAD?

Overall, 66% of CIO's and Outsourcing executives are dissatisfied with the green innovation, level of responsibility/accountability, and customized initiatives

of their outsourcers, particularly as promised in 2007-2009 contract negotiations.

Offshore outsourcers, particularly large competitive Indian vendors are making the exceptional progress, while Chinese and CEE vendors are making the least advances in green alternatives at attract and keep clients. As more vendors enter the market space in many emerging locations, few consider green options.

OFFSHORE OUTSOURCING	India	China	Latin America	Central & Eastern Europe
Offshore Vendor has Accepted and Performed to Sustainability Expectations	4%	1%	15%	17%
2008				
Offshore Vendor has Accepted and Performed to Sustainability Expectations	19%	2%	8%	6%
2009				

SAMESHORE OUTSOURCING	US	UK	Western Europe	Japan
Offshore Vendor has Accepted and Performed to Sustainability Expectations	71%	42%	35%	89%
2008				
Offshore Vendor has Accepted and Performed to Sustainability Expectations	65%	49%	57%	94%
2009				



Outsourcing Makes Changes

GREEN IT = EFFICIENT IT

Clients recommend the Top Efficiencies Outsourcers Should Take On before their Contract Ends to preserve likelihood of renewals

Efficiency	(Select Three)
Processor (Server) Virtualization	91.5%
Cloud Computing	91.2%
Storage Virtualization	85.7%
Information Life Cycle Management (ILM)	70.0%
Application Consolidation	62.3%
Desktop Power Management	61.4%
DC Appliance Consolidation	42.4%
Branch / Remote Office Consolidation	32.6%
Unified Communications and Video Collaboration	26.7%
Shared Service Buildings	25.0%
Recycling & Reuse Programs	20.2%
Reduction of Hazardous Materials	14.4%

Unfortunately, merely installing the latest in green computing does not guarantee an overall reduction in energy consumption. To deliver green IT, an outsourcing vendor, on behalf of their clients, needs to:

- tackle energy issues beyond the data centers and across the supply chain;
- deliver new ways of working both for the company and the clients;
- focus equal evaluations on the financial, operational and reputational risks from environmental disasters or pollution incidents by outsourcers as your company's green proxy; and
- promote green awareness internally and externally.

Outsourcing organizations can make a difference by establishing capabilities at locations with lower ambient temperatures, such as Iceland, and by making greater use of natural energy sources.

Green IT issues are not just a matter for the board, they also attract passionate individual interest. A green IT strategy needs to encompass organizational, client and individual needs.

At the organizational level, while green IT can change working practices, recognition and reward are critical. Telecommuting can reduce office space and travel, but cultural stigma may discourage adoption and organizations will need to make it clear that home working is acceptable.

Where applications can significantly reduce paper consumption, such as electronic commerce, trade-offs are needed. However, it can also change roles and reduce the number of IT staff needed.

IT procurement and project leaders will also need to base solutions on shared, standardized technology and factor in legacy disposal or recycling. Operators of green outsourced IT will need to plan and predict consumption and meet peak fluctuations in demand in the most efficient way.

Promotion is essential to build awareness both with suppliers and buyers of outsourcing.

On the supply side, numerous companies are trying to reduce data center energy consumption and provide more efficient services. Those companies include both IT infrastructure suppliers and users.

Those companies that have made the first steps are already reaping the financial rewards and it is clear that customer demand for sustainable outsourcing services is increasing.

Ensuring energy efficient outsourcing partners

Less than 23% of respondents reported that their organizations have measurable goals/outcomes with regard to green IT initiatives.

Of those with goals in place, those established so far commonly include:

- A 2-4% reduction in energy use;
- 100% recycling of electronic waste;
- A strict minimum percentage of green technology will be required in purchasing/procurement contracts;
- A 20-30% reduction in heat/cooling consumption.
- A 20-30% power reduction the data center in the next year; and
- Recycling of up to 100% of systems.

Because so few vendors have measurable goals in place to evaluate the effectiveness of their progress in outsourced green IT, this is an area that likely needs to evolve as green IT requirements become more commonplace. Most industry observers anticipate further regulatory guidance to help federal agencies and departments will be forthcoming in the near future. Until then, outsourcing vendors, specifically offshore suppliers, seem to be taking a pass attitude.

GREEN WASHING CONTINUES

With increasing numbers of outsourcing buyers asking for sustainable managed services, and more suppliers offering (or claiming to offer) eco-friendly wares, it has become critical for design professionals to respond with judiciousness and, of course, excellence.

"Greenwashing" is the practice of hyping eco-friendly product or service features that are dubious at best — has become commonplace in the outsourcing industry.

But hidden among the many green claims that have little merit, there are vendors that can deliver quantifiable benefits and quick paybacks, including broad environmental benefits such as the reduction of a company's carbon footprint in representing their clients.

Although no data exists to quantify how much greenwashing occurs, outsourcing buyers have become wary that as sustainability mounting gains in popularity, outsourcing companies trying to jump on the trend will tout more greenness than they deliver.

ESTABLISHING GREEN STANDARDS

Concerned about greenwashing, Black Book is teaming with global partners in 2009 who are establishing more protocol for specifications and tools that look at true sustainability performance and apply those strict standards to outsourcing vendors by 2010.

The industry is moving that way, with third-party validators. Buyers who have dealt with the sustainability programs and systems extensively can spot bogus claims but those new to outsourcing and/or greening tech may be taken advantage of.

At this time, no one seems to know how many outsourcing companies are professing sustainability when that is not the case. Black Book surveys states all reports have been anecdotal. Black Book notices at outsourcing trade shows more companies promising green attributes but when queried about the statements many salespeople cannot back up the tag lines with data.

There is such rapid movement toward a greener approach that there is an opportunity for either well-intentioned outsourcing vendors to make erroneous claims, out of lack of information and ignorance, or for profiteering. Models and policies are being created to not be left behind the competition.

Sustainability has been run on an honor system in outsourcing thus far. Many aspects of green practices are performed (or not) offshore that are attested to by the outsourcing supplier. If they don't do it, lack of compliance may or may not be discovered.

Communication is always important to avoiding misunderstandings but even more so in green outsourcing initiatives and managing expectations is crucial as there is no defined meaning of the word "green" inside the outsourcing industry or out.

All standards and rating systems, including LEED, the UN Global Compact, ISO and Black Book are in their infancy and are evolving but provide a useful standard.

Black Book's recommendation is that it is better to under promise and over deliver than to commit to an unachievable goal, which has caught up so many offshore outsourcing vendors in the sustainability race.

For now, ensuring an outsourcing project does not fall victim to greenwashing requires diligent research up front, and vigilance during the job to avoid the risk of not delivering what was expected and contracted...

Victims of Outsourcing Greenwashing	Offshore Vendor	US Vendor	UK Vendor	Japanese Vendor
Environment	94%	17%	44%	13%
Social	96%	10%	9%	33%
Economic	80%	29%	11%	26%
All Three	88%	20%	20%	25%

**Outsourcing Buyers:
Top Advice to Outsourcing Suppliers**
(Select 8 Top Priorities for Vendors to Implement)

Make Green An Organizational, Top-Down Priority	99.4%
Understand the Monitoring and reducing energy use demands of customer CIOs	95.6%
Implement Carbon Foot Print Dashboard	94.3%
Set Groundwork for Cloud Computing	94.0%
Green Lead from the Top	93.9%
Understand Your Environmental Impact	92.6%
Understand that hardware disposal is a key customer issue	85.7%
Know you energy costs	84.2%
Realize that client Budgets do not allow for increases in rates to receive green IT options	83.8%
Address your Low Hanging Fruit	72.0%

Purchase Renewable Energy	62.7%
Walk the Talk	59.3%
Carbon neutrality through Reduction and offsetting	58.4%
Engage your Stakeholders	52.4%
Establish a Green Team	45.9%
Participate in Making Standards/Regulations/Policy	44.5%
Become Energy Efficient by setting CO2 Reduction Targets	41.4%
Participate in Client Green Education	39.8%
Approach Greening as an Opportunity	39.7%
Complete Energy & Waste Audits	39.2%
Report Results	38.5%
Establish Sustainability Targets	36.1%
Reduce Business Travel, Hire Local	30.4%
Set an Emission Reduction Targets	27.0%
Take Advantage of Financial Incentives	26.6%
Obtain software for data center thermodynamic modeling and control	25.0%
View Greening as a Journey	24.7%
Conduct Vendor-Client Green Meetings	22.3%
Maintain Consumption Metrics	21.8%
Organize and Offer Carbon Pricing Schemes	21.0%
Consider LEED certification for existing buildings	20.3%
Seek Recognition for Your Environmental Efforts & Honors	13.9%

I. HOW CIO'S OUTSOURCING BUDGETED PROJECTS PRIORITIES/FUNDS HAVE CHANGED IN LAST 6 MONTHS

BUDGETED ITO INITIATIVES	Percent Marking 2009 Funds	Percent Marking 2009 Funds	Percent Marking 2010 Funds	Trend Change
	May 2008	November 2008	May 2009	
Rationalization (Applications and Infrastructure) Assessments	64.2%	30.3%	29.9%	▼
ITO Consultation & Advisement	51.3%	12.2%	32.4%	▲
Technological Transformation, Virtualization, RIM, Cloud	43.2%	59.1%	85.7%	▲
Process Improvement	40.8%	42.6%	45.8%	▲
ERP Implementations	24.9%	10.7%	16.8%	▲
Legacy Modernization ITO	23.1%	22.0%	10.4%	▼
Quality Initiatives	22.2%	9.7%	6.9%	▼
Data Center Outsourcing	19.5%	22.7%	13.0%	▼
Green/Sustainability Implementations	18.2%	7.1%	7.7%	▲

II. INDUSTRIES/VERTICALS WITH MOST AGGRESSIVE PLANS TO GROW ITO OUTSOURCING (2009) HAVE TRANSPLANTED GREEN/SUSTAINABILITY TO THE AGENDAS OF THEIR VENDORS

FINDINGS:

1. FINANCIAL VERTICAL CLIENTS MOVE “GREEN” OFF TOP 5 IT PRIORITIES FOR 2009 & 2010 EXCEPT IN CASH-SAVING CIRCUMSTANCES (REDUCED COST OF ENERGY PROGRAMS)
2. ENERGY & UTILITIES INDUSTRY MOVED SUSTAINABILITY PRIORITIES MUCH HIGHER DESPITE ECONOMY
3. GOVERNMENT AGENCIES RE-CONFIRM DEDICATION TO SUSTAINABLE IT VIA OUTSOURCING VENDORS
4. HEALTHCARE, PHARMACEUTICAL/BIOTECH AND NEWS/MEDIA/PUBLISHERS ARE MOST LIKELY VERTICALS TO EMPLOY GREEN OPTIONS AS AVOIDANCE TO REPUTATIONAL RISKS

Industries/Sectors to Expand Outsourcing Initiatives 2009	Percent Increasing ITO Initiatives in next 12 months	Green Initiatives are Top 5 Priority	Green Initiatives are Top 5 Priority	Green Initiatives are Top 5 Priority	CHANGE
		May 2008	November 2008	May 2009	
Banking	72.3%	81.9%	6.5%	4.5%	▼
Investment Management	68.5%	75.2%	10.7%	10.2%	▼
Insurance	62.7%	66.9%	8.2%	6.5%	▼
Legal	59.4%	11.5%	6.7%	6.2%	▼
Supply Chain, Logistics, Transportation	59.0%	15.9%	16.8%	24.9%	▲
Healthcare	54.6%	17.7%	16.0%	32.0%	▲
News, Media & Entertainment	52.8%	94.8%	50.4%	77.3%	▲
Energy & Utilities	47.1%	33.9%	81.9%	83.3%	▲
Agriculture/Food	39.4%	22.1%	8.3%	19.0%	▲
Pharmaceutical/Biotech	16.6%	74.4%	59.5%	54.2%	▲
Government & Public Agencies	10.2%	83.0%	85.2%	88.5%	▲
Manufacturing	8.5%	55.7%	40.6%	10.2%	▼

III. WHO SHOULD PAY FOR GREEN?

OUTSOURCERS/VENDOR FEEDBACK

Vendor Expects Buyers/Clients to Fund respective Outsourced Green Initiatives

- INDIA VENDORS 70.2% believe any sustainability demands should be at the expense of the customer (95.4% in 2008)
- US VENDORS 20.9% believe any sustainability demands are at the expense of the customer (22.5% in 2008)
- UK VENDORS 17.6% believe any sustainability demands are at the expense of the customer (15.9% in 2008)

BUYERS FEEDBACK

Expect Outsourcing Vendor to provide Green Initiatives as Gratis/Included Value Add and via Vendor Innovation Programs

- US BUYERS 91.0% believe any sustainability demands must at the expense of the vendor (61% in 2008)
- UK BUYERS 94.9% believe their green accountability should be the value add responsibility of their vendor (84% in 2008)

IV. INFLUENCING OUTSOURCING BUYER ORGANIZATIONAL PLANNING 2009

- ENERGY CONSUMPTION REDUCTION ACTIVITIES 85.8%
- RESPONSE CAMPAIGNS TO CONSUMER CONSCIOUSNESS 65.8%
- VIRTUALIZED SERVERS 57.6%
- REDUCED PRINTING 54.8%
- CLOUD COMPUTING 22.9%
- CARBON PRICING OPTIONS 13.7%



2009 Sustainability Forecasts

Outsourcing clients and prospects intent to contractually enforce outsourcers to:

	2009	2008	2007
Reduce global greenhouse gas emissions	90.2%	89.9%	15.4%
Manifest successful green strategies which progress over the term of the agreements	92.3%	80.3%	92.3%
Provide outsourcing company employees with ability to provide input for sustaining green processes	78.0%	73.7%	94.5%
Developing a Green Program Office as a formal conduit for communication and measurement reporting	80.6%	98.2%	67.9%

Expectations shift:	2009	2008	2007
Reduce the Carbon/Environmental Footprint of the client company to Zero Impact	90.5%	88.7%	24.9%
Oversee Environmental Health in areas where the client is supported	98.4%	95.9%	96.2%
Communicate Environmental Stewardship on behalf of the client	96.8%	99.4%	84.5%
Drive Product and Service Innovations that Effect Environmental Protection	89.3%	80.4%	78.0%
Mandate environmental legal compliance	22.3%	63.3%	97.2%
Assure public trust in the outsourcer through developed and communicated "green" tracking measures (not just rhetoric)	95.5%	96.7%	45.0%
Develop new green technologies, products and services which reduce wastes, conserve energies and increase the efficiency of resources	88.3%	67.9%	40.6%



Black Book's Green Methodology

How the Data Is Collected

Black Book sends invitations to participate in the Green Outsourcing Vendors survey annually to the validated participants of the Top 50 Best Managed Global Outsourcing Vendors poll. Black Book runs the survey from January 1 – March 1, 2009. Black Book collects ballot results on six grouped areas of operational sustainability excellence to rank vendors by outsourced service lines.

The gathered data is subjected immediately to an internal and external audit to verify completeness and accuracy, and to make sure the respondent is valid while ensuring the anonymity of the client company is maintained. During the audit, each data set is reviewed by a Brown-Wilson executive and at least two other people. In this way, our clients are able to clearly see how a vendor is truly performing. The KPI criteria on sustainability operational excellence are subdivided by the client's industry, market size, geography and function outsourced and reported accordingly. All ballots are submitted through an electronic web instrument which requires registration and ballot validation.

Survey findings are derived from a broad range of industries including finance/banking/accounting (18 percent), government (17 percent), insurance (10 percent), manufacturing (15 percent), healthcare/medical services (13 percent), pharmaceutical/bio-tech (6 percent), education/non-profit (5 percent), and wholesaler/retailer/distributor (4 percent).

More than half (62percent) of respondents are the top IT executive at their company or business unit. Nine out of ten (89 percent) respondents hold a director level title or higher. Company size distribution by annual revenue is as follows: less than \$100 million in revenue (42 percent), \$101 - \$999 million (39 percent), and \$1 billion or more (26 percent); 2 percent did not provide a revenue figure.

Understanding the Statistical Confidence of Black Book Data

Statistical confidence for each performance rating is based upon the number of organizations scoring the outsourcing service. Black Book identifies data confidence by one of several means:

Top Ten ranked vendors and advisors must have a minimum of ten unique clients represented. Broad categories require a minimum of ten unique client ballots. Data that is asterisked (*) represents a sample size below required limits and are intended to be used for tracking purposes only, not ranking purposes. Performance data for an asterisked vendor services can vary widely until a larger sample size is achieved. The margin of error can be very large and the reader is responsible for considering the possible current and future variation (margin of error) in the Black Book performance score reported. Vendors with over ten unique client votes are eligible for top ten rankings and are assured to have highest confidence and lowest variation.

Confidence increases as more organizations report on their outsourcing vendor. Data reported in this form is shown with a 95 percent confidence level (+/- .25, .20 or .15, respectively). Raw numbers include the quantity of completed surveys and the number of unique organizations contributing the data for the survey pool of interest. The margin of error on a sample size of 3200 is +/- 1.9%. Percents may not sum to 100 due to rounding.

Who Participates in the Black Book Ranking Process

Over 800,000 individuals are invited to participate annually (including C officers of the Fortune 2000, Inc 500, institutional members and officers of various professional organizations, subscribers of our media partners and previously validated survey participants). Non-invitation receiving participants must complete a verifiable profile, utilize valid corporate email address and are then included as well. Over 30,000 users were validated in the 2009 ranking process and received direct requests to participate in the Top Green Survey subsequent to the Top 50 Best Managed Global Outsourcing Vendor survey of clients and users from 95 countries.





Top Green 50 Nominated Outsourcers

The Top Green 50 Sourcing Vendors includes the highest ranking suppliers in all outsourcing domains. Information Technology Outsourcing (ITO), Business Process Outsourcing (BPO), Human Resources Outsourcing/Professional Employer Organizations/Recruitment Process Outsourcing (HRO), Finance and Accounting Outsourcing (FAO), Document Process Outsourcing (DPO), Legal Process Outsourcing (LPO), Facilities Management Outsourcing (FMO), Knowledge Process Outsourcing (KPO), Engineering Services Outsourcing (ESO). A vendor is required ten unique client votes validated for ranking but may nominate more than one in each domain.

Rank	Outsourcer	Nominated Outsourcing Domains	Total Client Nominations
1	Xerox	DPO/BPO	440
2	Accenture	ITO/HRO/BPO/FAO	429
3	CSC	ITO/FAO/BPO	403
4	Capgemini	ITO/BPO/FAO	396
5	IBM Global	ITO/BPO/FAO/HRO	390
6	Oracle	ITO	381
7	HCL	ITO/BPO	362
8	Patni	ITO/BPO	315
9	WNS Global	BPO/KPO	260
10	Hewlett Packard/EDS	ITO/BPO/FAO	259
11	Aramark	FMO	224
12	Perot Systems	ITO/ESO/BPO/FAO	219
13	Logica	ITO/BPO	215
14	Wipro	ITO/BPO/KPO	208
15	SITEL	BPO/Call Center	178
16	Mastech	ITO	154
17	Océ Business Services	DPO	127
18	SAP	ITO	121
19	CIBER	ITO	109
	SAIC	ITO	109
21	TechMahindra	ITO/BPO	102
22	BT	ITO/BPO/FAO/HRO	96
23	Atos Origin	ITO/BPO	94
24	ACS	ITO/BPO	90
25	Fujitsu	ITO	86

Rank	Outsourcer	Outsourcing Domains	Total Unique Nominations
26	T Systems	ITO	83
27	Orange Business Services	ITO/BPO	80
	eTelecare	BPO/Call Center	80
29	CH2M Hill	ITO/ESO	77
30	Infosys	ITO/BPO/FAO/KPO	76
31	Steria Xansa	ITO	73
	CGI	ITO, BPO	73
33	Innodata Isogen	DPO	64
34	Convergys	HRO, BPO	63
35	Sun Microsystems	ITO	62
36	TeleTech	BPO/Call Center	59
37	Hewitt	HRO	56
38	RR Donnelley	KPO/DPO	54
	UST Global	ITO	54
40	Sodexo	FMO	51
41	Northrop Grumann	ITO	50
42	Ariba	BPO	47
43	Emcor	FMO	44
44	Siemens	ITO/BPO	42
45	Unisys	ITO/BPO	40
46	XChanging	BPO	38
47	Pitney Bowes	BPO	35
48	Hitachi	ITO	33
49	Tata Consultancy Services	ITO/BPO/FAO/KPO	32
50	CompuCom/Getronics	ITO	30

MAJOR ▲ UPSHIFTS IN GREEN ACCOMPLISHMENT

2009 Rank	Vendor	Services	Rank Last Year
1	Xerox	DPO, BPO	35
2	Accenture	ITO/BPO/FAO/HRO	10
7	HCL	ITO/BPO	18
8	Patni	ITO/BPO	19
9	WNS Global	BPO	35
11	Aramark	FMO	-

WHO'S NEW TO 2009 TOP GREEN OUTSOURCER LIST

Vendor	Outsourcing Services
Aramark	Facilities Management
SITEL	BPO, Call Center
Mastech	ITO
TechMahindra	ITO, BPO
CGI	ITO, BPO
Innodata Isogen	DPO
Emcor	Facilities Management
CompuCom/Getronics	ITO

OUTSOURCERS WHO SLIPPED OFF ▼ THE GREEN LIST IN 2009

Vendor	Services	Rank Last Year
Genpact	BPO/FAO/KPO	16
Cognizant	ITO/FAO	20
Sapient	ITO	22
ADP	BPO/HRO	27
Ceridian	HRO	38
Fidelity	HRO	41
Intelligroup	ITO	42
Satyam	ITO/BPO	47
BearingPoint	ITO	48



The Criteria

Brown-Wilson Group collects metric sets as influenced by the sustainability and green criteria efforts of six supportable initiatives.

1. BLACK BOOK: SUSTAINABILITY METRICS

Sustainability metrics include three sectors: Environmental Protection, Social Improvements, and Economic Growth.

Advocates of green investing also believe that a company's environmental performance is a reflection of how the company is managed. Management style is an intangible factor that is difficult to measure, yet it can have a dramatic impact on a stock's performance. We believe that if management cares about the environment, it is culturally disposed toward caring about other things, including employees, shareholders and corporate governance.

2. UN GLOBAL COMPACT: SOCIAL & ECONOMIC PRINCIPLES

Launched in 2000, the UN Global Compact brings business together with UN agencies, labour, civil society and governments to advance ten universal principles in the areas of human rights, labour, environment and anti-corruption. Through the power of collective action, the Global Compact seeks to mainstream these ten principles in business activities around the world and to catalyze actions in support of broader UN goals. With over 4,100 participating companies and hundreds of other stakeholders from more than 120 countries, it is the world's largest voluntary corporate citizenship initiative.

3. UN GLOBAL COMPACT: ENVIRONMENTAL PRINCIPLES

4. ISO

The ISO 14000 environmental management standards exist to help organizations minimize how their operations negatively affect the environment (cause adverse changes to air, water, or land) and comply with applicable laws and regulations.

ISO 14001 is the international specification for an environmental management system (EMS). It specifies requirements for establishing an environmental policy, determining environmental aspects and impacts of products/activities/services, planning environmental objectives and measurable targets, implementation and operation of programs to meet objectives and targets, checking and corrective action, and management review.

ISO 14000 is similar to ISO 9000 quality management in that both pertain to the process (the comprehensive outcome of how a product is produced) rather than to the product itself. The overall idea is to establish an organized approach to systematically reduce the impact of the

environmental aspects which an organization can control. Effective tools for the analysis of environmental aspects of an organization and for the generation of options for improvement are provided by the concept of Cleaner Production.

As with ISO 9000, certification is performed by third-party organizations rather than being awarded by ISO directly. The ISO 19011 audit standard applies when auditing for both 9000 and 14000 compliance at once.

5. LEED

The Leadership in Energy and Environmental Design (LEED) Green Building Rating System™ encourages and accelerates global adoption of sustainable green building and development practices through the creation and implementation of universally understood and accepted tools and performance criteria.

LEED is a third-party certification program and the nationally accepted benchmark for the design, construction and operation of high performance green buildings. LEED gives building owners and operators the tools they need to have an immediate and measurable impact on their buildings' performance. LEED promotes a whole-building approach to sustainability by recognizing performance in five key areas of human and environmental health: sustainable site development, water savings, energy efficiency, materials selection and indoor environmental quality.

Architects, real estate professionals, facility managers, engineers, interior designers, landscape architects, construction managers, lenders and government officials all use LEED to help transform the built environment to sustainability. State and local governments across the country are adopting LEED for public-owned and public-funded buildings; there are LEED initiatives in federal agencies, including the Departments of Defense, Agriculture, Energy, and State; and LEED projects are in progress in 41 different countries, including Canada, Brazil, Mexico and India. Two independent councils auditing building certifications include the Indian (IGBC) and U.S. Green Building Councils (USGBC).

6. SIX SIGMA

Measured approach to going green, Green Sigma™ consulting offering is based on Lean Six Sigma, a business strategy for carefully analyzing operations to improve overall efficiency, lower costs, increase quality, and add, change or eliminate activities and processes to improve overall performance.

This new offering applies these principles wherever energy and water are used throughout a client's operations -- transportation systems, datacenters and IT systems, manufacturing and distribution centers, office facilities, retail space, research and development sites, etc.

The constraints and costs of energy and water usage are rising at an accelerating rate, with a significant impact on business operations and financial performance. In addition, companies are coming under increasing pressure from governments, advocacy groups, investors, prospective employees, and consumers to make their operations, products and services more socially responsible, particularly regarding the environment.



455 Qualified Vendors with Minimum 10 Unique Client Ballots

Green & Sustainability Standard Performance

Criteria Set	Received Score of <u>8.0 or higher</u> (Mean on 1-10 Scale)	Meets + Need Improvement to Exceed (Mean of <u>Less than 6.5</u> of 10)	Do Not Meet (Mean of <u>Less than 5.0</u> of 10)
Black Book Sustainability Standards	122	157	176
UN Global Compact Social Responsibility & Human Rights Principles	109	224	122
UN Global Compact Environmental Protection Principles	70	243	140
ISO Principles	250	108	97
LEED Green Building Principles	39	102	310
Six Sigma Green	35	115	304
TOTAL (All Principles)	31	123	301



TOP TWENTY GREEN INNOVATIVE INFORMATION TECHNOLOGY VENDORS

Rank	ITO VENDORS	Black Book Sustainability	UN Social	UN Environmental	ISO	LEED	Six Sigma	MEAN
1	Patni	9.77	8.90	9.75	9.83	9.02	9.87	9.52
2	CSC	9.90	9.30	9.47	9.85	9.22	9.25	9.50
3	Oracle	9.82	9.44	9.35	9.33	9.25	9.67	9.48
4	IBM Global	9.83	8.56	9.27	9.41	9.94	9.68	9.45
5	HCL	9.24	9.03	9.70	9.63	9.15	9.89	9.44
6	Accenture	9.90	9.17	9.09	9.30	9.40	9.55	9.40
7	Hewlett Packard/EDS	9.09	9.31	9.28	9.45	9.23	9.76	9.35
8	Capgemini	9.33	8.94	9.25	9.04	9.11	9.17	9.14
9	Perot Systems	9.03	8.60	8.71	8.12	9.33	8.57	8.73
10	SAIC	9.21	8.00	8.61	9.20	8.18	9.09	8.72
11	Atos Origin	8.97	8.14	8.66	8.70	8.75	9.06	8.70
12	ACS	8.39	9.02	8.73	8.24	8.11	9.51	8.67
13	Wipro	9.44	8.30	8.75	8.11	8.52	8.39	8.59
14	Logica	8.55	8.48	9.28	8.19	7.97	8.86	8.56
15	Tech Mahindra	8.29	9.26	8.55	8.46	8.08	8.39	8.51
16	ITC Infotech	8.44	8.63	7.89	8.19	8.11	8.74	8.34
17	Hitachi	8.31	9.18	8.07	8.23	7.76	7.95	8.25
18	Unisys	8.06	8.38	8.26	7.52	8.88	8.21	8.22
19	T Systems	8.22	7.63	7.88	8.34	8.74	8.31	8.19
20	Tata Consultancy Services	8.26	6.89	7.03	7.76	7.43	9.69	7.84

KEY

GENERALLY DISSATISFIED	INCONSISTENTLY SATISFED	SATISFICATORY PERFORMANCE	OVERWHELMING SATISFACTION
DOES NOT MEET EXPECTATIONS	MEETS SOME/FEW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS
CAN NOT RECOMMEND VENDOR	RESERVES RECOMMENDATION	RECOMMENDS VENDOR	HIGHLY RECOMMENDED VENDOR
1.00-5.87	5.88-7.32	7.33-8.70	8.71 -10.00

1.0 (Deal Breaking Dissatisfaction) ↔ 10.00 (Overwhelmingly Satisfied)
SCALE

CRITERIA SET	GREEN KEY PERFORMANCE INDICATORS
Black Book Sustainability Standards	<ol style="list-style-type: none"> 1. Reduces Carbon Imprint of Client Towards Zero Impact 2. Oversees Environmental Health on Behalf of Client 3. Communicates Environmental Stewardship on Behalf of Client 4. Drives Product and Service Innovations that Effect Environmental Protection 5. Mandates Environmental Legal Compliance 6. Assures Public Trust through developed and communicated "Green" Tracking Measures (not just rhetoric) 7. Develops new Green Technologies, products and services which reduce wastes, conserve energies & increase efficiency of resources 8. Voluntarily establishes Higher Standards of Sustainability for clients than imposed in industry 9. Manifests successful Green Strategies which progress over the term of the agreements 10. Governance Program orchestrates Goals and needs of client 11. Adheres to Strict Environmental Disposal Processes 12. Implements Green Procurement Practices 13.
UN Global Compact Social Responsibility & Human Rights Principles	<ol style="list-style-type: none"> 14. Eliminate discrimination in respect of employment and occupation 15. Complicit in eliminating human rights abuses through labor standards where operating 16. Works against corruption in all its forms, including extortion and bribery in countries of operations
UN Global Compact Environmental Protection Principales	<ol style="list-style-type: none"> 17. Outsourcing vendor supports a Precautionary Approach to Environmental challenges 18. Outsourcing vendor undertakes initiatives to promote greater Environmental Responsibility 19. Outsourcing vendor encourages the Development and Diffusion of environmentally friendly technologies 20. Supports Green Benchmarks & baselines for outsourcing
ISO Principles	<ol style="list-style-type: none"> 21. Program Oversight, Assessment & Audit (includes non-regulated services): 14000 22. Staff Training & Development: 14001 23. Environmental objectives and targets and to establishing and monitoring operational controls: (14004) 24. Environmental Goal Setting and Performance Review (14034) 25. Monitoring of Greenhouse Gases (14064) 26.
LEED Green Building Principles	<ol style="list-style-type: none"> 27. LEED Building: Existing Facilities 28. LEED Building: New Facilities
Six Sigma Green	<ol style="list-style-type: none"> 27. Establishing key performance indicators related to a particular company's operating profile 28. Creating a way to measure and manage specific carbon output and inefficient water use areas. 29. Setting up an Energy, Water and Waste Management Dashboard for monitoring performance indicators. 30. Internal activities offer suggestions about how to and improve existing processes to meet specific goals.

TOP INDIAN IT OUTSOURCING VENDORS

Garnering approval from customers is an important value-add for green initiatives, and it will soon become a deal breaker as more consumers and governments set expectations for sustainability as the price of doing business...particularly if offshore prices/costs continue to rise. The sustainability conversation is moving into the mainstream including Indian mega-vendors who have not demonstrated green innovation to engage their clients, people, and see what the opportunities may miss the new growth and business value from their sluggish leadership in sustainability. While only four Indian vendors scored in the Top Twenty Technology Green Vendors for 2008, seven moved into the Top Twenty in 2009, demonstrating a realization that Green Options are a business necessity.

2009 RANK INDIAN TECH OUTSOURCING SUPPLIERS	COMPANY
1	PATNI
2	IBM GLOBAL
3	HCL
4	WIPRO
5	TECH MAHINDRA

TOP EUROPEAN IT OUTSOURCING VENDORS

Leading the sustainability initiative in many global initiatives, European vendors and users are among the most politically active in greening up outsourced services. Four European outsourcing vendors scored in the Top Twenty Technology Green Vendors for 2008, down from six last year.

2009 RANK EUROPEAN TECH OUTSOURCING VENDORS	COMPANY
1	CAPGEMINI
2	ATOS ORIGIN
3	LOGICA
4	T SYSTEMS

TOP NORTH AMERICAN IT OUTSOURCING VENDORS

Leading the sustainability initiative in many global initiatives, European vendors and users are among the most politically active in greening up outsourced services. Four European outsourcing vendors scored in the Top Twenty Technology Green Vendors for 2008, down from six last year.

2009 RANK NORTH AMERICAN ITO VENDORS	COMPANY
1	CSC
2	ORACLE
3	ACCENTURE
4	HEWLETT PACKARD/EDS
5	PEROT SYSTEMS

TOP AUSTRALIAN IT OUTSOURCING VENDORS

Among the fastest adoptions of green alternatives, energy efficiencies and carbon offsets.

2009 RANK AUSTRALIAN OUTSOURCING VENDORS	COMPANY
1	CAPGEMINI
2	ACCENTURE
3	UNISYS
4	INFOSYS

INFRASTRUCTURE AS A SERVICE (IAAS) - CLOUD COMPUTING

Cloud computing, particularly in the Mid Tier, is a simple and immediate environmentally-friendly option. Gaining significant popularity, the IAAS or Cloud Computing top ten results of the 2008 Black Book survey of outsourcing client experience and satisfaction are provided below. The 2009 survey is open through May 6, 2009. Results will be posted at www.TheBlackBookOfOutsourcing.com when audited.

2008 Rank	TIER 1 IT INFRASTRUCTURE - CLOUD	MID TIER IT INFRASTRUCTURE - CLOUD
1	EMC-PI-VMWARE	AMAZON
2	MICROSOFT	SAVVIS
3	IBM GLOBAL	3TERRA
4	SUN MICROSYSTEMS	BLUELOCK
5	INTEL	LAYERED TECHNOLOGIES
6	CITRIX	TIER3
7	HEWLETT PACKARD	MOSSO
8	BT	ADAPTIVITY
9	DELL	JOYENT
10	FUJITSU	NIRVANIX



TOP SUSTAINABLE ANCILLARY SUPPORT OUTSOURCING VENDORS

BUSINESS PROCESS OUTSOURCING

Lean Green Six Sigma programming and adherence to sustainability and UN protocols propelled three vendors to receive top honors for eco-friendly BPO and cost efficiencies:

2009 Rank	BUSINESS PROCESS OUTSOURCING VENDOR
1	WNS GLOBAL
2	ACCENTURE
3	CAPGEMINI

TRANSPORTATION, SUPPLY CHAIN & PROCUREMENT OUTSOURCING

The top three vendors as scored by clients in this vital category of outsourced services to green initiatives are:

2009 Rank	TRANSPORTATION SUPPLY CHAIN & PROCUREMENT OUTSOURCING VENDOR
1	IBM GLOBAL
2	ACCENTURE
3	ACS

DOCUMENT PROCESS OUTSOURCING

The top three vendors as scored by clients in this vital category of outsourced services to green initiatives are:

2009 Rank	DOCUMENT PROCESS OUTSOURCING VENDOR
1	XEROX
2	OCE BUSINESS SERVICES
3	INNODATA ISOGEN

FACILITIES MANAGEMENT OUTSOURCING

The top three vendors as scored by clients in this vital category of outsourced services to green initiatives are:

2009 Rank	FACILITIES MANAGEMENT OUTSOURCING VENDOR
1	ARAMARK
2	SODEXHO
3	EMCOR

ENGINEERING SERVICES OUTSOURCING

The top three vendors as scored by clients in this vital category of outsourced services to green initiatives are:

2009 Rank	ENGINEERING SERVICES OUTSOURCING VENDORS
1	CH2M HILL
2	PEROT SYSTEMS
3	CONTINENTAL DESIGN



Top Ranked Climate Change Business Consultants and Advisors: Sustainable Outsourcing Services

With EPA stepping up enforcement of its numerous (and confusing) regulations, more facilities are getting hit with costly fines and penalties. Consultants are leading active discoveries and an unbiased approach to help outsourcing governance, IT executives and corporate environmental managers prevent sustainability risks and effectively control costs. Consultants best offer immediate information and assess your vendors precisely on the top client/user ranked rationale for hiring advisor team:

- How outsourcing will help you reduce risk of noncompliance and avoid fines
- Which environmental functions to consider outsourcing, which to keep in-house
- Contracting environmental firms best suited for your facility, vertical or functional process
- Top "gotchas" to watch for when outsourcing - and how to avoid them from contracting to monitoring
- When outsourcing management makes the best business sense
- Strategies to Ensure Compliance
- What are the direct benefits of outsourcing your environmental and sustainability program oversight
- Allocating risk between outsource provider and your facility
- Defining roles for in-house staff and outsourced services
- Negotiating Environmental Outsourcing Services
- Selecting your sustainability partner/vendor
- Determining the scope and range of services
- Setting service level expectations in a clear, enforceable manner
- Contractual provisions that ensure outsourcing success

* Separate Surveys conducted as part of 2009 Top Outsourcing Advisors survey, February 2009

TOP GREEN TECHNOLOGY & OUTSOURCING CONSULTANTS & INDEPENDENT ADVISORS

Rank	Consulting Firm	Green Capabilities Score (0-10 Scale)
1	PricewaterhouseCoopers	9.35
2	Diamond Management & Technology Consultants	9.29
3	Deloitte	9.21
4	Ovum	9.20
5	ICF International	9.15
6	HBS Consulting	9.11
7	GreenStar Technology	9.09
8	EcoSecurities	9.06
9	Booz	9.04
10	NeoIT	9.00
	SustainableIT	9.00



TOP CONSULTING GREEN BUILDING & ENVIRONMENTAL OUTSOURCING CONSULTANTS

(Ranked by Total Client Nominations)

1. Simon & Associates (San Francisco, CA)
2. Paladino & Company (Seattle WA)
3. International Resources Group (Washington, DC)
4. Tohn Environmental Solutions (Wayland, MA)
5. AEI Consultants (Walnut Creek, CA)
6. Yudelson Associates (Tucson, AZ)
7. Yarmuth Radoff Green Sustainability Consultants (New York City, NY)
8. Weston Solutions (Houston TX)
9. SECOR/Stantech (Canada)
10. Farr Associates (Chicago, IL)

TOP MIDMARKET CLIENT SIZE OUTSOURCING CONSULTANTS: GREEN BUILDING LEED CONSULTING

1. 7Group (Kutztown, PA)
2. Verdigris Group (Chicago, IL)
3. Greenform (Hollywood CA)
4. Green Hill Projects (Harrisburg PA)
5. IKAN Consulting (Cuba, NY)

The Outsourcing Management Institute sanctions the annual process by authorizing and endorsing specific quantifiable and qualifiable criteria that objectively judge outsourcing leadership impact and organizational operational excellence as result of managerial control. Bringing true value to outsourcing buyers, job seekers and vendors, Outsourcing' Best Managed top fifty ranked vendors, recognized globally as the "Black Book 50" is differentiated from similar judged rankings by not being based on any subjective criteria, and the "Top Green Outsourcing Vendors" honors those recommended by clients for their sustainability initiatives.



The purpose of annual updating the Top Green Outsourcing Vendors is to provide objective sustainability analysis and non-biased advisement to outsourcing buyers and investors.

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