

Infrastructure Management Services (IMS) encompass all the services that relate to monitoring, managing and enhancing performance of a client's IT infrastructure backbone.

Today companies are trying to reduce their IT infrastructure cost, thereby standardizing and automating their infrastructure management. This has led to huge opportunities in offshoring IMS.

The total global IMS market is USD 250 billion. The outsourced IMS market forms about USD 200 billion of this amount. NASSCOM estimates that out of this, about 40-60% can be offshored and operated remotely.

Unlike other traditional IT services where US dominates as the largest market, EMEA contributes 49% to the total IMS offshore market, surpassing US which contributes 48%.

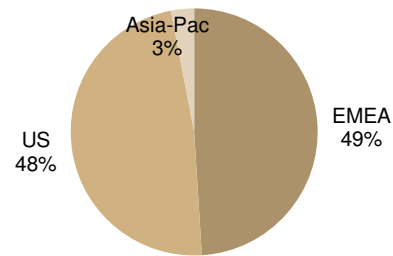
European small and medium clients especially have started offshoring more and more IMS work, helping EMEA to edge ahead of US in terms of market size

The Global IMS market is dominated by large players like IBM, Accenture, EDS, HP, etc. primarily due to their value offerings and global presence.

The top India-based IMS firms primarily consist of the large IT firms. Over the past few years, these firms have developed credible, competitive offerings in the infrastructure management space, and the market is now showing confidence in these companies.

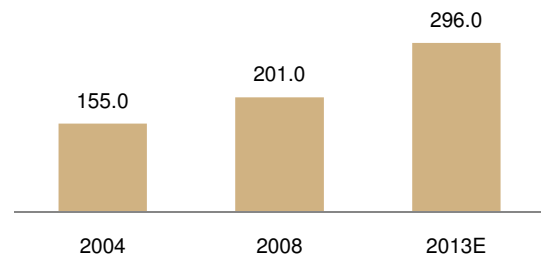
With the ever-increasing client interest in global delivery options, India continues to be on the radar for offshoring of IMS.

**Exhibit 1: Key IMS Markets, 2008**



Source: o3 Capital Analysis

**Exhibit 2: IMS Outsourcing Market (2004 – 2013)**



Note: Figures in USD bn; Source: o3 Capital Analysis

This report by o3 Capital captures the tremendous potential of remote infrastructure management services (RIMS) for India, with in-depth analysis of the key market drivers and players. It also gives a brief overview of the global market and competitive landscape, coupled with the various facets and offerings under IMS.

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