



# Service Expansion Opportunities for Document Outsourcing: Western Europe

---

Project Director:	Matt Swain, Associate Director
Project Manager:	Riley McNulty, Associate Director
Senior Advisors:	Jeff Hayes, President Scott Harr, Senior Research Analyst Megan McCarthy, Primary Research Specialist Eve Padula, Corporate Writer
Creative Services:	William Scott, Desktop Publisher
Editorial/Proofreading:	Mark DiMattei, Corporate Editor

---

This report is copyrighted by InfoTrends and is made available to a limited number of clients subject to the following conditions:

InfoTrends retains all rights to this report in its entirety.

Reproduction and/or disclosure in whole or in part to parties other than the InfoTrends client to whom the document was originally sent is prohibited without the express written consent of InfoTrends.

This report should be treated as confidential and proprietary for internal use only.

The information is believed to be accurate and reliable, but cannot be guaranteed to be correct or complete.

**InfoTrends, Inc.**  
97 Libbey Industrial Parkway, Suite 300  
Weymouth, MA 02189  
(781) 616-2100  
[www.infotrends.com](http://www.infotrends.com)

## Table of Contents

Executive Summary	6
<i>Forecast</i>	7
<i>Emerging Services</i>	9
Customer Communications Management (CCM)	9
Document Processing and Extension into BPO	11
<i>In-depth Interviews</i>	13
<i>Future Needs: Core Competencies</i>	14
IT & Operations	14
Sales & Marketing	15
<i>Recommendations for Outsourcing Service Providers</i>	15
<i>Closing Thought from “Jack: Straight from the Gut”</i>	16
Introduction	17
Project Objectives	17
Methodology	17
<i>Primary Research</i>	17
Web-Based Questionnaire	17
In-depth Interviews	18
<i>Secondary Research</i>	18
<i>Market Forecast</i>	18
Document Outsourcing Defined	18
Market Forecast	19
<i>Market Segmentation &amp; Taxonomy</i>	19
Data Segment	19
Archive & Storage	19
Marketing Analytics & Campaign Management	20
Content Segment	20
Composition	20
Creative	20
Production & Delivery Segment	20
e-Delivery	20
Fulfilment & Distribution	21
Mailroom Management	21
Print Management	21
Off-site Printing (Graphic Arts/Utility)	21
Off-site Printing (Transactional)	22
On-site Printing (Graphic Arts/Utility)	22
On-site Printing (Transactional)	22
Scanning	22
Advisory Segment	22
Consulting	22
Process Segment	23
Document Process Outsourcing	23
Business Process Outsourcing	23

<i>Key Players</i>	23
<i>Forecast Summary for France, Germany, and the United Kingdom</i>	26
Data Segment Forecast and Key Assumptions	27
Content Segment Forecast and Key Assumptions	30
Production & Delivery Segment Forecast and Key Assumptions	32
Advisory Segment Forecast and Key Assumptions	38
Process Segment Forecast and Key Assumptions	39
Emerging Services	42
<i>Customer Communications Management</i>	42
<i>Document Processing and Extension into BPO</i>	45
Survey Analysis	48
<i>Demographics</i>	48
Key Highlights	48
Breakdown by Region and Vertical Industry	49
Number of Employees	50
Annual Revenues	51
Job Title	52
Outsourcing Status	54
Physical Mail and Digital Communications Volumes	55
<i>Customer Communications Management</i>	57
Key Highlights	57
Primary Areas of Influence	57
Annual Spending on Marketing-Related Documents	58
Top Operational Challenges	59
Top Execution Challenges	62
Overall Process	64
Marketing Processes	64
Billing & Payments	64
Point Solution	65
Archive, Data Management & Analytics	65
Customer Service	65
Top CCM Priorities	66
Document Outsourcing	69
Print Management	69
On-site Print Production/Facilities Management	69
Off-Site Print Outsourcing	72
Business Process Challenges	75
Assessment of Document Outsourcing Vendors' Capabilities	77
Reasons for Not Outsourcing	78
<i>Document Processing and Management</i>	80
Key Highlights	80
High-volume Document Capture/Imaging	81
Scanning/Digital Capture Volume	82
When Document Imaging/Capture Occurs and Primary Destination of Documents	83
Top Document Imaging Priorities	84
Scanning/Imaging Contracts	85
Business Process Challenges	87
Assessment of Document Outsourcing Vendors' Capabilities	88
Reasons for Not Outsourcing	89
<i>Business Process Outsourcing</i>	90
Key Highlights	92

Business Process Outsourcing Influence	92
Strategic Planning and Business Process Requirements	93
Customer Onboarding	93
Accounts Payable	96
Claims Processing	98
Application/Loan Processing	100
Other Business Process Functions Managed/Influenced	101
Business Process Outsourcing Practices	103
Customer Onboarding	104
Accounts Payable	105
Claims Processing	106
Claims Processing	106
Application/Loan Processing	107
Importance of Various Features in a BPO/DPO Engagement	109
Average Contract Values	110
Workflow, Service, and Technology Components	111
Business Process Challenges	113
Assessment of Document Outsourcing Vendors' Capabilities	114
Respondents Who Do Not Outsource BPO/DPO	115
Perspectives from Influential Stakeholders	117
<i>Understanding Why and When Companies Outsource</i>	117
<i>Understanding What Companies Outsource</i>	118
<i>Understanding with Whom to Outsource</i>	119
<i>Key Outsourcing Stakeholders—Don't Forget about Marketing!</i>	119
<i>Print Management—Bringing Transparency to a Cost Centre</i>	120
<i>Printing Declines Lead to Focus on Communications</i>	121
<i>Service Expansion Opportunities</i>	121
Recommendations for Outsourcing Service Providers	124
InfoTrends' Opinion	124

## List of Tables and Figures

Figure 1: Document Outsourcing Forecast for France, Germany, and the U.K., 2011-2016	7
Figure 2: Document Outsourcing Forecast for France, Germany, and the U.K. by Segment, 2011-2016	8
Figure 3: Service Bundles Spanning Business Processes will Drive Future Growth	9
Figure 4: Filling Gaps between Traditional Services of Archive, Composition, and Print	10
Figure 5: Business Process Requirements and Service Opportunities	12
Table 1: Document Outsourcing Forecast Segmentation	19
Table 2: Key Document Outsourcing Players in Western Europe	24
Table 3: France, Germany & U.K. Document Outsourcing Forecast: 2011-2016 (€ Millions)	26
Table 4: Data Segment Forecast, 2011-2016 (€ Millions)	27
Table 5: Combined Country Key Assumptions for the Data Segment Forecast	29
Table 6: Content Segment Forecast, 2011-2016 (€ Millions)	30
Table 7: Combined Country Key Assumptions for the Content Segment Forecast	31
Table 8: Production & Delivery Print Segment Forecasts, 2011-2016 (€ Millions)	32
Table 9: Production & Delivery Non-Print Segment Forecasts, 2011-2016 (€ Millions)	35
Table 10: Key Assumptions for All Production & Delivery Segment Forecasts	37
Table 11: Advisory Document Outsourcing Services, 2011-2016 (€ Millions)	38
Table 12: Process Segment Forecast, 2011-2016 (€ Millions)	39
Table 13: Combined Country Key Assumptions for DPO & BPO Outsourcing Forecast	41
Figure 6: Service Bundles Spanning Business Processes will Drive Future Growth	42
Figure 7: Services Opportunities Rise above Foundational Challenges & Priorities	43
Figure 8: Filling the Gaps between Traditional Services of Archive, Composition and Print	44
Figure 9: Business Process Requirements and Service Opportunities	46
Figure 10: Breakdown by Region and Vertical Industry	49
Figure 11: Number of Employees	50
Figure 12: Annual Revenues	51
Figure 13: Title/Position	52
Table 14: Share of Respondents Involved in Various Outsourcing Decisions	53
Figure 14: Business Function Outsourcing Process	54
Figure 15: Number of Communications Sent to Customers/Prospects Monthly	55
Figure 16: Percentage of Respondents who Expect Communication Volumes to Increase	56
Figure 17: Primary Areas of Influence (Top Responses)	58
Figure 18: Primary Operational Challenges in Customer Communications	59
Table 15: Greatest Unmet Needs for CCM & Marketing: France	60
Table 16: Greatest Unmet Needs for CCM & Marketing: Germany	61
Table 17: Greatest Unmet Needs for CCM & Marketing: U.K.	61
Figure 19: Primary Execution Challenges in Customer Communication (Top Responses)	63
Table 18: Verbatim Responses Concerning Processes Considered for Outsourcing (1)	64
Table 19: Verbatim Responses Concerning Processes Considered for Outsourcing (2)	65
Figure 20: Top Priorities for Customer Communications (Top Responses)	66
Figure 21: Relative Importance of Various Initiatives	67
Figure 22: Communication Channels in Use	68
Figure 23: Anticipated Spend on Existing/Upcoming On-Site Outsourcing Contracts (Means)	71
Figure 24: Anticipated Spend on Existing/Upcoming Off-Site Outsourcing Contracts (Means)	72
Figure 25: Gaps within Off-site Print Outsourcing Contract	73
Table 20: Business Process Challenges	75
Figure 26: Agreement with Marketing Campaign Management Statements	76
Figure 27: Outsourcers' Competency in Various Areas	77
Figure 28: Communication Services that Would Increase Propensity to Outsource	78
Figure 29: Annual Spending for Services (Means)	79
Figure 30: Primary Source of Document Capture/Imaging (Top Responses)	81
Figure 31: Anticipated Change in Volume of Scanning/Digital Capture	82
Figure 32: Primary Destination of Scanned/Indexed Documents	83
Figure 33: Primary Document Imaging Priorities (Top Responses)	84
Figure 34: Business Processes within Scanning/Imaging Contract (Top Responses)	85
Figure 35: Features Included in Scanning/Imaging Outsourcing Contract	86

Table 21: Business Process Challenges	87
Figure 36: Outsourcers' Competency in Various Areas	88
Figure 37: Scanning Services that Would Increase Propensity to Outsource	89
Figure 38: Primary Area of Business Process Outsourcing Influence	92
Figure 39: How Enterprises Typically Addresses Business Process Challenges	93
Figure 40: Biggest Challenges with Customer Onboarding Process	94
Figure 41: Technologies & Services that would benefit the Onboarding Process	95
Figure 42: Biggest Challenges in Accounts Payable Process	96
Figure 43: Technologies & Services that would benefit the Accounts Payable Process	97
Figure 44: Biggest Challenges in Claims Processing	98
Figure 45: Technologies & Services that would benefit Claims Processing	99
Figure 46: Biggest Challenges in Application/Loan Processing	100
Figure 47: Technologies & Services that would benefit Application/Loan Processing	101
Figure 48: Business Process Functions Managed/Influenced	102
Figure 49: Outsourcing Status for Various Business Processes	103
Figure 50: Extent of Business Process Outsourcing	104
Table 22: Customer Onboarding Processes Outsourced & Technologies/Services Used	105
Table 23: Accounts Payable Processes Outsourced & Technologies/Services Used	106
Table 24: Claims Processing Processes Outsourced & Technologies/Services Used	107
Table 25: Application/Loan Processes Outsourced & Technologies/Services Used	108
Figure 51: Importance of Capabilities in BPO/DPO Engagement	109
Figure 52: Total Contract Value of BPO/DPO Engagement	110
Figure 53: Workflow Components Outsourced in BPO/DPO Contract (Top Responses)	111
Figure 54: Technologies and Services Outsourced in BPO/DPO Contract	112
Table 26: Business Process Challenges	113
Figure 55: Outsourcers' Competency in Various Areas	114
Figure 56: Primary Reasons for NOT Outsourcing BPO/DPO	115
Figure 57: BPO/DPO Services that Would Increase Propensity to Outsource	116