

IT Outsourcing Service Market in Japan: Key Research Findings 2016

◆ Research Outline

Yano Research Institute has conducted a study on the domestic IT outsourcing service market with the following conditions:

1. Research period: May to July, 2016
2. Research target: Computer manufacturers, system integrators (SIs), datacenter-specialized businesses, and other IT outsourcing service providers
3. Research methodologies: Face-to-face interviews by the expert researchers, surveys via telephone/email, and literature research

<What are IT Outsourcing Services?>

IT outsourcing services in general indicate maintenance and operation support services for IT hardware and software provided by external companies. The IT outsourcing services in this research are categorized into the following two services: Onsite maintenance/operation support services (provided at user companies) and datacenter services (the operation and maintenance services for the systems within the datacenters). The market size is calculated based on the sales of the IT outsourcing service providers.

◆ Key Findings

■ IT Outsourcing Service Market Projected to Attain 3,998.5 Billion Yen by FY2019

The total IT outsourcing service market in FY2015, the mainstream services of which shifting from onsite maintenance/operation support to datacenter services, was 100.2% of the size of the preceding fiscal year to attain 3,843.4 billion yen. Thanks to prevailing and diversifying cloud services and increasing use of datacenters, CAGR (Compound Average Growth Rate) of the market from FY2014 to FY2019 is likely to be 0.8%, and the market size is expected to achieve 3,998.5 billion yen by FY2019.

■ Market of Datacenter Services to Achieve 2,403.5 Billion Yen by FY2019

Whereas public cloud has been showing stable growth, the cloud services have been widely diversified at the same time. The users have come to be able to freely choose optimal cloud services including hybrid cloud and private cloud. In addition to continuously growing number of companies relying on datacenters to place increased servers, more cloud service providers have come to use datacenters. Driven by such users, CAGR of datacenter service market (which is part of the IT outsourcing service market) from FY2014 to FY2019 is likely to attain 3.6%, with the market size expected to achieve 2,403.5 billion yen by FY2019, based on the sales of the businesses.

◆ **Report format:**

Published report “IT Outsourcing Market 2016”

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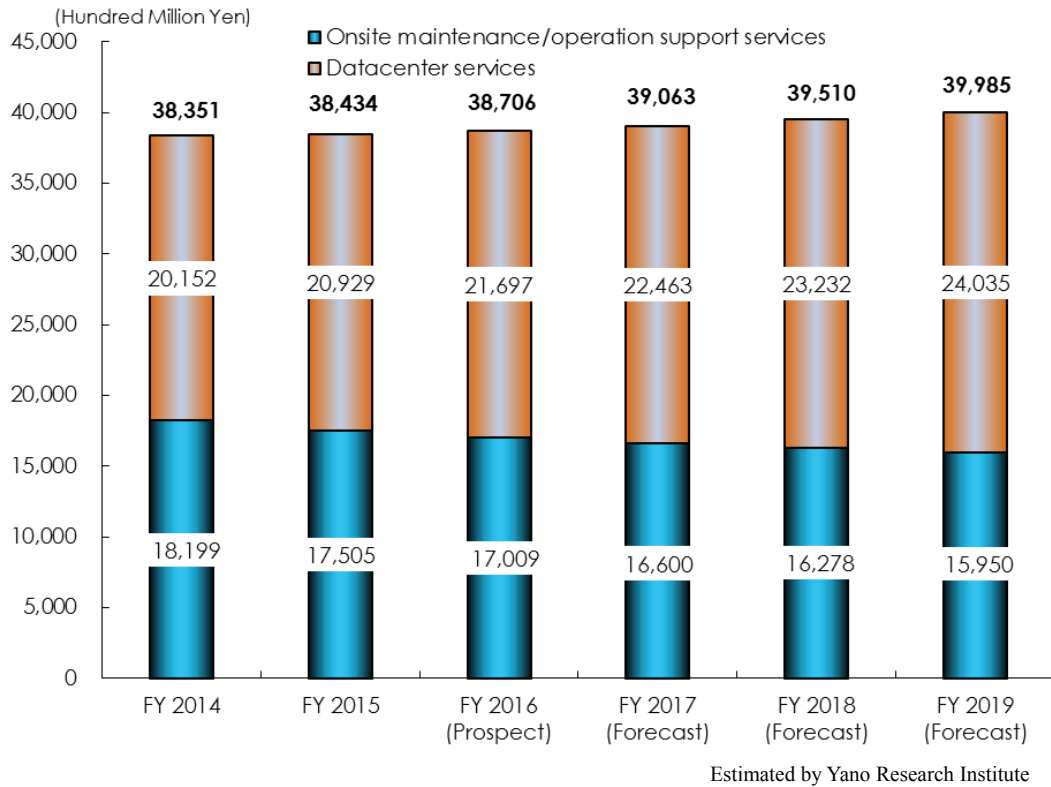
Language: Japanese

Format: 387 pages in A4 format

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■ **Figure 1: Transition and Forecast of IT Outsourcing Service Market Size**



Notes:

- The IT outsourcing services in this research are categorized into the following two services: Onsite maintenance/operation support services (provided at user companies) and datacenter services (the operation and maintenance services for the systems within the datacenters). The market size is calculated based on the sales of the IT outsourcing service providers.
- The values in FY2016 are prospect and in FY2017 and beyond are forecast.
- In detail, the onsite maintenance and operation support services indicate the following four services: “onsite hardware operation services”, “onsite software operation services”, “onsite hardware maintenance services”, and “onsite software maintenance services”. On the other hand, the datacenter services indicate the following nine services: “housing”, “hosting”, “datacenter hardware operation services”, “datacenter software operation services”, “datacenter hardware maintenance services”, “datacenter software maintenance services”, “IaaS (Infrastructure as a Service)”, “PaaS (Platform as a Service)” and “SaaS (Software as a Service)”.