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Leslie P. Willcocks • Ilan Oshri
Julia Kotlarsky
Editors

Dynamic Innovation in Outsourcing

Theories, Cases and Practices

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Editors
Leslie P. Willcocks
London School of Economics and Political Science
London, UK

Ilan Oshri
Loughborough University
Loughborough, UK

Julia Kotlarsky
Aston Business School
Aston University
Birmingham, UK

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Series Preface

We launched this series in 2006 to provide policymakers, workers, managers, academics, and students with a deeper understanding of the complex interlinks and influences among technological developments, including in information and communication technologies (ICT), work organizations, and globalization. We have always felt that technology is all too often positioned as the welcome driver of globalization. The popular press neatly packages technology's influence on globalization with snappy sound bites, such as "Any work that can be digitized will be globally sourced." Cover stories report Indians doing US tax returns, Moroccans developing software for the French, Filipinos answering UK customer service calls, and the Chinese doing everything for everybody. Most glossy cover stories assume that all globalization is progressive, seamless, and intractable and leads to unmitigated good. But what we are experiencing in the twenty-first century in terms of the interrelationships between technology, work, and globalization is both profound and highly complex. Moreover, there is the continuous emergence of new technologies and their combinations, as the present volume witnesses with cloud computing and automation technologies to the fore by 2018.

The mission of this series is to disseminate rich knowledge based on deep research about relevant issues surrounding the globalization of work that is spawned by technology. To us, substantial research on globalization considers multiple perspectives and levels of analyses. We seek to

publish research based on in-depth study of developments in technology, work, and globalization and their impacts on and relationships with individuals, organizations, industries, and countries. We welcome perspectives from business, economics, sociology, public policy, cultural studies, law, and other disciplines that contemplate both larger trends and micro-developments from Asian, African, Australian, and Latin American, as well as North American and European viewpoints.

As of this writing, we have 25 books published or under contract. These books are introduced below.

1. *Global Sourcing of Business and IT Services* by Leslie P. Willcocks and Mary C. Lacity is the first book in the series. The book is based on over 1000 interviews with clients, providers, and advisors and 15 years of study. The specific focus is on developments in outsourcing, offshoring, and mixed sourcing practices from client and provider perspectives in a globalizing world. We found many organizations struggling. We also found some organizations adeptly creating global sourcing networks that are agile, effective, and cost-efficient. But they did so only after a tremendous amount of trial and error and close attention to details. All our participant organizations acted in a context of fast-moving technology, rapid development of supply-side offerings, and ever-changing economic conditions.
2. *Knowledge Processes in Globally Distributed Contexts* by Julia Kotlarsky, Ilan Oshri, and Paul van Fenema examines the management of knowledge processes of global knowledge workers. Based on substantial case studies and interviews, the authors—along with their network of co-authors—provide frameworks, practices, and tools that consider how to develop, coordinate, and manage knowledge processes in order to create synergetic value in globally distributed contexts. Chapters address knowledge sharing, social ties, transactive memory, imperative learning, work division, and many other social and organizational practices to ensure successful collaboration in globally distributed teams.
3. *Offshore Outsourcing of IT Work* by Mary C. Lacity and Joseph W. Rottman explores the practices for successfully outsourcing IT work from Western clients to offshore providers. Based on over 200

interviews with 26 Western clients and their offshore providers in India, China, and Canada, the book details client-side roles of chief information officers, program management officers, and project managers and identifies project characteristics that differentiated successful from unsuccessful projects. The authors examine ten engagement models for moving IT work offshore and describe proven practices to ensure that offshore outsourcing is successful for both client and provider organizations.

4. *Exploring Virtuality within and Beyond Organizations* by Niki Panteli and Mike Chiasson argues that there has been a limited conceptualization of virtuality and its implications on the management of organizations. Based on illustrative cases, empirical studies, and theorizing on virtuality, this book goes beyond the simple comparison between the virtual and the traditional to explore the different types, dimensions, and perspectives of virtuality. Almost all organizations are virtual, but they differ theoretically and substantively in their virtuality. By exploring and understanding these differences, researchers and practitioners gain a deeper understanding of the past, present, and future possibilities of virtuality. The collection is designed to be indicative of current thinking and approaches, and provides a rich basis for further research and reflection in this important area of management and information systems research and practice.
5. *ICT and Innovation in the Public Sector* by Francesco Contini and Giovan Francesco Lanzara examines the theoretical and practical issues of implementing innovative ICT solutions in the public sector. The book is based on a major research project sponsored and funded by the Italian government (Ministry of University and Research) and coordinated by Italy's National Research Council and the University of Bologna during the years 2002–2006. The authors, along with a number of co-authors, explore the complex interplay between technology and institutions, drawing on multiple theoretical traditions such as institutional analysis, actor network theory, social systems theory, organization theory, and transaction costs economics. Detailed case studies offer realistic and rich lessons. These case studies include e-justice in Italy and Finland, e-bureaucracy in Austria, and Money Claim On-Line in England and Wales.

6. *Outsourcing Global Services: Knowledge, Innovation, and Social Capital* edited by Ilan Oshri, Julia Kotlarsky, and Leslie P. Willcocks assembles the best work from the active participants in the Information Systems Workshop on Global Sourcing, which began in 2007 in Val d'Isere, France. Because the quality of the contributions was exceptional, we invited the program chairs to edit a book based on the best papers at the conference. The collection provides in-depth insights into the practices that lead to success in outsourcing global services. Written by internationally acclaimed academics, it covers best practices on IT outsourcing, business process outsourcing (BPO), and netsourcing.
7. *Global Challenges for Identity Policies* by Edgar Whitley and Ian Hosein provides a perfect fit for the series, in that the authors examine identity policies for modern societies in terms of the political, technical, and managerial issues needed to prevent identity fraud and theft. The scale of the problem exceeds political boundaries, and the authors cover national identity policies in Europe and the rest of the world. Much of the book provides in-depth discussion and analysis of the United Kingdom's National Identity Scheme. The authors provide recommendations for identity and technical policies.
8. *E-Governance for Development* by Shirin Madon examines the rapid proliferation of e-Governance projects aimed at introducing ICT to improve systems of governance and thereby promote development. In this book, the author unpacks the theoretical concepts of development and governance in order to propose an alternative conceptual framework, which encourages a deeper understanding of macro- and micro-level political, social, and administrative processes within which e-Governance projects are implemented. The book draws on more than 15 years of research in India during which time many changes have occurred in terms of the country's development ideology, governance reform strategy, and ICT deployment.
9. *Bricolage, Care and Information Systems*, edited by Chrisanthi Avgerou, Giovan Francesco Lanzara, and Leslie P. Willcocks, celebrates Claudio Ciborra's *Legacy in Information Systems Research*. Claudio Ciborra was one of the most innovative thinkers in the field of information systems. He was one of the first scholars who introduced institutional

economics in the study of Information Systems (IS); he elaborated new concepts, such as "the platform organization" and "formative contexts"; he contributed to the development of a new perspective altogether through Heideggerian phenomenology. This book contains the most seminal work of Claudio Ciborra and work of other authors who were inspired by his work and built upon it.

10. *China's Emerging Outsourcing Capabilities*, edited by Mary C. Lacity, Leslie P. Willcocks, and Yingqin Zheng, marks the tenth book in the series. The Chinese government has assigned high priority to science and technology as its future growth sector. China has a national plan to expand the information technology outsourcing (ITO) and business process outsourcing (BPO) sectors. Beyond the hopes of its leaders, is China ready to compete in the global ITO and BPO markets? Western companies are increasingly interested in extending their global network of ITO and BPO services beyond India and want to learn more about China's ITO and BPO capabilities. In this book, we accumulate the findings of the best research on China's ITO and BPO sector by the top scholars in the field of information systems.
11. *The Outsourcing Enterprise: From Cost Management to Collaborative Innovation* is edited by Leslie P. Willcocks, Sara Cullen, and Andrew Craig. The central question answered in this book is: how does an organization leverage the ever-growing external services market to gain operational, business, and strategic advantage? The book covers the foundations of mature outsourcing enterprises that have moved outsourcing to the strategic agenda by building the relationship advantage, selecting and levering suppers, keeping control through core retained capabilities, and collaborating to innovate. The book provides proven practices used by mature outsourcing enterprises to govern, design, and measure outsourcing. The final chapter presents practices on how mature outsourcing enterprises prepare for the next generation of outsourcing.
12. *Governing Through Technology* by Jannis Kallinikos is a thoughtful scholarship that examines the relationships among information, technology, and social practices. The author discusses the regulative regime of technology and issues of human agency control and

complexity in a connected world. He provides a valuable counter-perspective to show that social practices are, in part, unmistakably products of technologies, that technologies are, through historical processes, embedded in the social fabric, and that, if technological determinism is naive, the notion of the regulative regime of technology remains alive and well into the Internet Age.

13. *Enterprise Mobility: Tiny Technology with Global Impact on Information Work* by Carsten Sørensen explores how mobile technologies are radically changing the way work is done in organizations. The author defines enterprise mobility as the deployment of mobile information technology for organizational purposes. The author contrasts how large technology projects in organizations, such as enterprise resource planning (ERP) implementations, will increasingly be managed differently because of mobile technology. The introduction of mobile technology supporting organizational information work will often be driven by individuals, by small teams, or as part of departmental facilitation of general communication services.
14. *Collaboration in Outsourcing: A Journey to Quality* edited by Sjaak Brinkkemper and Slinger Jansen is based on an integrated program of outsourcing research at Utrecht University in the Netherlands. The book is written for practitioners based on interviews and case studies in many global outsourcing firms including Cisco, IBM, Deloitte, Infosys, Logica, and Partni—to name a few. The 16 chapters are short, tight, and written to communicate best practices quickly. The chapters cover the topics of governance, knowledge management, relationship management, and new trends in software development outsourcing.
15. *Advanced Outsourcing Practice: Rethinking ITO, BPO and Cloud Services* by Mary C. Lacity and Leslie P. Willcocks is based on insights from a research program covering over 2200 sourcing arrangements. The book provides an overview of robust practices gleaned from over 20 years of research in the outsourcing field. It covers advanced areas of study, including what providers say about establishing and managing outsourced services, shared services, the changing role of client project management, best-of- breed versus bundled services, rural and impact sourcing, and shifting to cloud services.

16. *Sustainable Global Outsourcing: Achieving Social and Environmental Responsibility in Global IT and Business Process Outsourcing* by Ron Babin and Brian Nicholson examines, through a series of case studies and surveys, current sustainability trends. The book recommends how providers should prepare for increasing buyer demands in this area, suggesting that buyers and providers can work together to build successful outsourcing relationships through collaborative sustainability projects.
17. *Managing Change in IT Outsourcing: Towards a Dynamic Fit Model* by Albert Plugge examines three provider organizations and explores how they have to deal with major fit issues, including strategy, capabilities, and organizational structures, in meeting changing buyer requirements. The book finds that a lack of fit and adaptive behavior on the part of providers helps explain the lack of sustained service performance as a recurring problem in outsourcing arrangements. The author uses evidence to highlight the links between sourcing capabilities, organization structure, and positive sourcing outcomes. Providers who are able to adapt to changing client circumstances, while establishing a fit on these critical factors, tend to succeed in achieving sustainable superior performance.
18. *Materiality and Space: Organizations, Artefacts and Practices*, edited by François-Xavier de Vaujany and Nathalie Mitev, focuses on how organizations and managing are bound with the material forms and spaces through which humans act and interact at work. Developing theoretical insights along the way, the book concentrates on three separate domains in organizational practices: sociomateriality, sociology of space, and social studies of technology. The contributors examine these domains with respect to collaborative workspaces, media work, urban management, e-learning environments, managerial control, mobile lives, institutional routines, and professional identity.
19. *South Africa's BPO Service Advantage: Becoming Strategic in the Global Marketplace* by Leslie P. Willcocks, Mary C. Lacity, and Andrew Craig examines South Africa's growing business services sector and its maturing capability, moving from voice to non-voice, and complex business process outsourcing (BPO) services. The study uses

survey and case study data to provide an overview of BPO global trends, explore the location attractiveness of ten comparator countries, and assess in detail the performance and prospects for South Africa's BPO industry. The book also provides seven detailed case studies covering voice, non-voice, legal services, shared services, captives and offshore outsourcing practices, giving insight and lessons, and assessing future policy directions.

20. *Materiality and Time: Historical Perspectives on Organizations, Artefacts and Practices* is edited by Francois-Xavier de Vaujany, Nathalie Mitev, Pierre Laniray, and Emmanuelle Vaast. This book is a continuation and extension of *Materiality and Space: Organizations, Artefacts and Practices* that focuses on the materialization of time. The collection includes chapters on materializing time and history in organizations, temporal dynamics of artefacts and materiality in organizations, and stretching out time and materiality in organizations from presentism to *longue durée*.
21. *Materiality, Rules and Regulation: New Trend in Management and Organization Studies* is edited by Francois-Xavier de Vaujany, Nathalie Mitev, Giovan Francesco Lanzara, and Anouk Mukherjee. This is the third book on materiality in the series. This volume explores how material artefacts can enforce regulation and substitute for formal norms, rules, and supervision. The authors investigate materiality, rules, and regulation from several theoretical perspectives, including Marxism, institutionalism, neo-institutionalism, process studies, regulation sociology, and affordance literature.
22. *Socially Responsible Outsourcing: Global Sourcing with Social Impact* is edited by Brian Nicholson, Ron Babin, and Mary Lacity. This collection is the second one in the series and extends and updates ideas published in *Sustainable Global Outsourcing: Achieving Social and Environmental Responsibility in Global IT and Business Process Outsourcing*. The book contains research papers that focus on the topic of socially responsible outsourcing (SRO) and on impact sourcing. It includes research frameworks, rich case studies, and an SRO agenda for the future.

In addition to the books already published and several under contract, we have other manuscripts under review but always need more. We encourage other researchers to submit proposals to the series, as we envision a protracted need for scholars to deeply and richly analyze and conceptualize the complex relationships among technology, work, and globalization. Please contact the series editors in the first instance.

London, UK
St Louis, USA
January 2018

Leslie P. Willcocks
Mary C. Lacity

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Contents

Part I Introduction 1

1 Why Innovation and Why Now? 3
Leslie P. Willcocks, Ilan Oshri, and Julia Kotlarsky

Part II Managing Outsourcing: Towards Dynamic Innovation 27

2 Outsourcing Reframed: Delivering on Collaborative Innovation 29
Leslie P. Willcocks and Edgar A. Whitley

3 Strange Bedfellows No More: Researching Business Process Outsourcing and Dynamic Innovation 57
Mary Lacity and Leslie P. Willcocks

4 What Client Firms Want and Are Willing to Do to Achieve Innovation from Their Suppliers: Insights from the Nordic, Italian, and British Outsourcing Sectors 95
Ilan Oshri, Julia Kotlarsky, Angelika Zimmermann, and Giovanni Vaia

5 Relational and Contractual Governance for Innovation 131
Ilan Oshri, Julia Kotlarsky, and Alexandra Gerbasi

6 Innovation: Where Do Consultants Fit In? 167
Ilan Oshri, Daria Arkhipova, and Giovanni Vaia

Part III The New Outsourcing—Cloud and Service Automation 195

7 Cloud Computing as Innovation: Cases and Practices 197
Leslie P. Willcocks and Mary Lacity

8 Innovating Customer Relationship Management Cloud Services at Standard Chartered Bank 239
Graham Costello and Leslie P. Willcocks

9 Innovating in Service: The Role and Management of Automation 269
Mary Lacity and Leslie P. Willcocks

List of Contributors

Daria Arkhipova is a postdoctoral research fellow at the Department of Management at Ca' Foscari University of Venice. Daria's research interests include informational technology, strategy, competitive interaction, and managerial decision-making. She has been an active collaborator of the Digital Enterprise Lab (DEL) and Center of Experimental Research in Management and Economics.

Graham Costello is Global Client Advisor for Oracle Corporation, having previously been Director of Financial Services Sector— Asia Pacific (APAC), for first Hewlett Packard, then subsequently Oracle. He has also been managing director of Bearing Point and the client director for Telecom New Zealand Australia, working for Commonwealth Bank Australia. Graham completed his doctorate at Oxford University, on knowledge management in strategic alliances, and has published a number of academic papers on these subjects. In his present work, he has been responsible for building consulting organisations from scratch, and more recently, transitioning large corporations to the cloud. Combined with extensive experience and academic research into outsourcing, he is searching for opportunities to contribute to Oracle's "pivot to the cloud."

Alexandra Gerbasi is a professor at Exeter Business School, University of Exeter, United Kingdom. Her research focuses on the relationships between organizational traits and performance. Her work was published in leading international journals such as *Journal of Management*, *Journal of Strategic Information Systems*, and others.

Julia Kotlarsky is Professor of Technology and Global Sourcing at Aston Business School, United Kingdom. She is also a visiting professor at Rotterdam School of Management, Erasmus University, Netherlands. Julia's research interests revolve around sourcing and innovation of knowledge-intensive business services and coordination in dynamic organizational settings. Her work was published in numerous journals including *MIS Quarterly*, *European Journal of Information Systems*, *Journal of Strategic Information Systems*, *The Wall Street Journal*, and others. Julia is a regular presenter in international conferences and conventions. She has published 14 books; among them, *The Handbook of Global Outsourcing and Offshoring* is widely used by practitioners and academics. She is co-founder and organizer of the annual Global Sourcing Workshop (www.globalsourcing.org.uk). Julia serves as a senior editor for *Journal of Information Technology*, and a former associate editor for *MIS Quarterly*.

Mary Lacity is Curators' Distinguished Professor at the University of Missouri-St. Louis and a visiting scholar at Massachusetts Institute of Technology Center for Information Systems Research (MIT CISR). She has held visiting positions at the LSE, Washington University, and Oxford University. She is a Certified Outsourcing Professional®, Industry Advisor for Symphony, and Co-editor of the Palgrave Series: *Work, Technology, and Globalization*. Her research focuses on the delivery of business and IT services through global sourcing and automation. She has conducted case studies and surveys of hundreds of organizations on their outsourcing and management practices. She has given keynote speeches and executive seminars worldwide and has served as an expert witness for the US Congress. She was inducted into the IAOP's Outsourcing Hall of Fame in 2014, one of only three academics to ever be inducted. She was the recipient of the 2008 Gateway to Innovation Award sponsored by the IT Coalition, Society for Information Management, and St. Louis Regional Chamber of Commerce (RCGA). She has published 26 books, most recently *Robotic Process Automation and Risk Mitigation: The Definitive Guide* (2017) and *Service Automation: Robots and the Future of Work* (2016; co-author Leslie P. Willcocks). Her publications have appeared in the *Harvard Business Review, Sloan Management Review, MIS Quarterly, MIS Quarterly Executive, IEEE Computer, Communications of the ACM*, and many other academic and practitioner outlets.

Ilan Oshri is Professor of Globalisation and Technology at Loughborough School of Business and Economics, Loughborough University, United Kingdom. Ilan is the author of "Offshoring Strategies: Evolving Captive Centers Models" (MIT Press, 2011, winner of ERIM Best Book Award), book series editor of

Outsourcing and Offshoring (2013), and the co-author of "The Handbook of Global Outsourcing and Offshoring" (3rd Edition, Palgrave, 2015). He co-authored/co-edited 15 books on outsourcing and offshoring. His work has either appeared or been accepted for publication in numerous journals and magazines including *The Wall Street Journal*, *MIS Quarterly* (2015 best European paper), *Business History*, *MISQ Executive*, *Communications of the ACM*, *IEEE Transactions on Engineering Management*, *European Journal of Information Systems*, *Journal of Information Technology*, *Management Learning*, *Journal of Strategic Information Systems* (2007 Best Paper Award) and others. His work on outsourcing was featured on BBC *Radio 4*, *BusinessWeek*, *Financial Times*, and many other journals and magazines. He is acting as Associate Editor of *MIS Quarterly* and Senior Editor of *Journal of Information Technology*. Ilan is a regular speaker in international conferences, a contributor to leading professional outlets, and a keynote speaker in corporate events and seminars. He is the co-founder of the Global Sourcing Workshop (www.globalsourcing.org.uk).

Giovanni Vaia is an assistant professor with tenure at Ca' Foscari University Venice at the Department of Management where he teaches Global Sourcing and Digital Management. Giovanni Vaia's interests include organization design and general management with a specific focus on digital transformation, information systems, network governance and outsourcing, and performance management. He is the founder and the Scientific Director of the DEL at Ca' Foscari.

Edgar Whitley is Associate Professor of Information Systems in the Information Systems and Innovation Group at the LSE. He has a BSc (Econ) and a PhD in Information Systems, both from the LSE. Edgar is the co-editor for *Information Technology & People*. He is also involved in the EnCoRe project (www.encore-project.info) that is addressing the role of consent (and the revocation of consent) as a mechanism for providing control over the use of personal data. Together with Gus Hosein, he has recently published *Global Challenges for Identity Policies* (Palgrave, 2010).

Leslie P. Willcocks is Professor of Technology Work and Globalization at the Department of Management at LSE. He heads the LSE's Outsourcing Unit research centre and is Editor-in-Chief of the *Journal of Information Technology*. Leslie has a global reputation for his work in robotic process automation, AI, cognitive automation and the future of work, outsourcing, global strategy, organizational change, and managing digital business. He is co-author of 57 books, and has published over 240 refereed papers in journals such as *Harvard Business Review, Sloan Management Review, California Management Review, and MIS*

Quarterly, Journal of Management Studies. He is a regular keynote speaker at international practitioner and academic conferences, and has been retained as adviser and expert witness by major corporations and government institutions in the UK, USA, Europe, and Asia Pacific.

Angelika Zimmermann is Senior Lecturer in International Business and Strategy at the School of Business and Economics in the University of Loughborough. Her research focuses on international collaboration in offshoring arrangements, global teams, and expatriate assignments, with a special interest in the Indian, Chinese, German, and UK contexts. She has published in leading academic journals such as the *Journal of Vocational Behavior*, *Information Systems Journal*, *the International Journal of Management Reviews*, *The International Journal of Human Resource Management*, and *International Studies of Management & Organization*.

List of Figures

Fig. 1.1	The innovation ladder in outsourcing. Source: Oshri and Kotlarsky (2011)	12
Fig. 1.2	Impact of incremental and radical innovation on the operational and strategic levels of the client firm. Source: Oshri and Kotlarsky (2011)	13
Fig. 1.3	Comparing service outsourcing and innovation mentalities. Source: Oshri (2014)	20
Fig. 2.1	The global sourcing learning curve 1989–2020. Figure 2.1 has been developed from Lacity, M.C., and Rottman, J.W. (2008). *Offshore Outsourcing of IT Work*. Palgrave Macmillan, London	31
Fig. 2.2	Four practices underpin collaborative innovation process	36
Fig. 3.1	Categories of innovations (n = 85)	65
Fig. 3.2	The dynamic innovation process (Source: authors)	69
Fig. 3.3	The primary source of innovation ideas (n = 189 respondents)	81
Fig. 4.1	Is innovation in outsourcing important? (Results in this figure and others sometimes do not add up to 100% because some respondents have chosen 'Do Not Know' which was not included in this presentation)	100
Fig. 4.2	Innovation, budget, and time	101
Fig. 4.3	Innovation and contract types	103
Fig. 4.4	The distribution of pricing models	104
Fig. 4.5	Knowledge and capabilities	105

Fig. 4.6	Alignment of goals and objectives	108
Fig. 4.7	Trust and open communication	109
Fig. 4.8	Closeness of the relationship	110
Fig. 4.9	Proactivity and effort by supplier and client	111
Fig. 4.10	Support by executives versus bottom-up approach	114
Fig. 4.11	Innovation performance	115
Fig. 4.12	Innovation and running costs	116
Fig. 4.13	Innovation and service/product offering	117
Fig. 4.14	Innovation and process transformation	118
Fig. 4.15	Innovative solutions delivered by third-party suppliers	118
Fig. 4.16	The quality of innovations delivered through outsourcing	119
Fig. 4.17	Organisation's strategic intent for outsourcing and innovation	121
Fig. 4.18	Advisory firms and innovation	121
Fig. 4.19	Functional background of respondents	122
Fig. 4.20	Pricing model used to achieve innovation	124
Fig. 4.21	Does a contract with gain-sharing clauses provide incentives for third-party suppliers to deliver innovation?	124
Fig. 4.22	Does the contractual agreement between the client and third-party supplier need to focus on service quality rather than costs?	125
Fig. 4.23	Agree or disagree—'The supplier understood the strategic roadmap of this particular service.'	126
Fig. 4.24	Agree or disagree—'We understood the supplier's strategic goal for this particular service.'	127
Fig. 4.25	Organisation's ability to assess the suppliers' capability over the last five years	127
Fig. 4.26	Agree or disagree—'We treated the key third party supplier employees like our own employees.'	128
Fig. 4.27	The mechanisms leading to innovation	129
Fig. 5.1	Theoretical model	141
Fig. 6.1	*Marginal effects of supplier-client knowledge familiarity on innovation* performance: advisory versus non-advisory case	186
Fig. 7.1	CBA's multi-provider model of cloud computing	217
Fig. 7.2	Cloud journey	231
Fig. 8.1	CEMS sales and service capabilities	245
Fig. 9.1	RPA software as "non-invasive"	271
Fig. 9.2	Structured data on corporate earnings from Zach Investment	281
Fig. 9.3	A sample corporate earnings report. Source: The AP, reproduced with permission	281

Fig. 9.4 Meter reading process before service automation 283
Fig. 9.5 Meter reading process after service automation 284
Fig. 9.6 London premium advice notices (LPAN): before RPA (left) and after RPA (right) 286
Fig. 9.7 "Poppy" (reproduced with permission, Xchanging) 287
Fig. 9.8 Robotic process automation and cognitive intelligence tools 294
Fig. 9.9 Mature service automation operating model 308

List of Tables

Table 3.1	Source of innovation ideas and funding	84
Table 4.1	Areas currently outsourced to third-party suppliers	122
Table 5.1	Description of the sample	143
Table 5.2	Factor analysis of components in analysis	145
Table 5.3	Means, standard deviations and correlations	147
Table 5.4	Hierarchical OLS linear regression predicting strategic innovation	148
Table 6.1	Description of the sample (n = 147)	180
Table 6.2	Descriptive statistics and correlation matrix	183
Table 6.3	OLS regression model on innovation performance	184
Table 7.1	The three SMEs and cloud computing	200
Table 7.2	Cost drivers	202
Table 7.3	Stakeholder concerns	204
Table 7.4	Contractual governance	207
Table 7.5	Relationship governance	209
Table 7.6	Satisfaction with provider performance	211
Table 7.7	Business value delivered	212
Table 7.8	Cloud computing as the infrastructure for business services within an "ambidextrous" and agile organizational form	230
Table 7.9	Summary of findings in SMEs	234
Table 8.1	Innovation cycle for Standard Chartered Bank CEMS	242
Table 8.2	Key customer metrics	247
Table 8.3	Symbiotic innovations Standard Chartered and Oracle	260

Table 8.4	Comparing systems integration outsourcing and cloud services	262
Table 8.5	Appendix: Interviewees	266
Table 9.1	Client organizations represented	275
Table 9.2	Provider organizations represented	277
Table 9.3	Advisor organizations represented	279
Table 9.4	Action principles	289
Table 9.5	Automation and sourcing decisions (1 = strongly disagree; 7 = strongly agree)	315