Welcome to the 70th Quarterly ISG Index™

Covering the State of the Managed Services & As-a-Service Industry for the Global Commercial Market
Global Combined Market
Combined Market ACV up 7%; Managed Services up 2%, as demand slowed in March on COVID-19 concerns; As-a-Service up 11% on demand for hyperscale services, offsetting weakness in SaaS.

Impact of COVID-19
85% of Q1 Managed Services deals awarded in January and February; pandemic-related drop-off began in early March across Europe and later in the Americas; Americas results saw less of an impact due to late-March timing.

Regional Perspective
Each region delivered Y/Y Combined Market growth: Americas grew in both As-a-Service and Managed Services; EMEA up in Managed Services only; Asia Pacific up in As-a-Service only.

Scorecard

<table>
<thead>
<tr>
<th></th>
<th>1Q20 ACV ($B)</th>
<th>1Q Y/Y Change</th>
<th>TTM ACV ($B)</th>
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<td><strong>Combined Market</strong></td>
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<td><strong>By Type</strong></td>
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<td>Managed Services *</td>
<td>6.8</td>
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<tr>
<td>As-a-Service</td>
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<td><strong>By Region</strong></td>
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<tr>
<td>Americas Combined</td>
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<td>EMEA Combined</td>
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* Managed Services, formerly called Traditional Sourcing, is defined as ITO/BPO, Infrastructure, ADM and Network markets, which we’ve always reported on.
What is the Impact of COVID-19 on the Managed Services Market?

**First Quarter**
- Managed Services was depressed 700 basis points
- Managed Services ACV was on track for 9-10% rise Y/Y
- As-a-Service impacted minimally; IaaS saw brief surge due to WFH mandate

**Second Quarter**
- Managed Services braces for 17% decline
- SaaS providers may feel hit as firms reduce costs & user licenses amid furloughs
- IaaS providers may get boost as firms move more workloads to public cloud

**Second Half**
- Managed Services rebound expected in 2H
- Overall ACV for the year may drop 7% Y/Y
- Digital transformation likely to accelerate post-COVID
- SaaS spending likely to shift to cybersecurity, cloud migration, collaborative tools
Global Commercial Sector

Quarterly Trends

- 1Q20 Combined Market surpassed $14B for the first time ever
- Managed Services advanced slightly after starting the quarter strong with some larger deals
- Pandemic has seen strong hyperscale demand, as providers like Microsoft, AWS and Google regularly see peak loads

Combined Market Quarterly ACV ($B)

Global Commercial Sector ACV by Function ($B)
Service & Technology Provider Standouts – GLOBAL

Our Contracts Knowledgebase™ is used to determine placements based on the annual value of commercial contracts awarded in the past 12 months.

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<td>Allscripts*</td>
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<tr>
<td>Amazon</td>
<td>Equinix</td>
<td>ServiceNow</td>
<td>Autodesk</td>
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<tr>
<td>Google</td>
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<td>Workday*</td>
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* New to leaderboard in 1Q20

Providers in alphabetical order; no rankings implied. Revenues sourced from D&B and individual company financial filings.
Quarterly Trends

- Managed Services advanced 6% Y/Y with three straight quarters over $3B; Infrastructure ACV was up 20%+ on strong network activity
- As-a-Service ACV surpassed $4B for the first time
- COVID-19 impacted the Americas later in the quarter, resulting in stronger numbers than in the other regions

Combined Market Quarterly ACV ($B)

Americas Commercial Sector ACV by Service Type ($B)
Quarterly Trends

- Managed Services was up 6% Y/Y against an easy compare; DACH and Benelux contributed to the rise
- As-a-Service ACV up just 1% Y/Y as enterprise battle in public cloud infrastructure intensified
- Initial lockdown measures implemented in Italy followed by DACH, Spain, the U.K. and rest of Europe

Combined Market Quarterly ACV ($B)

- Combined Market ACV TTM 5.0%
- Managed Services ACV TTM 7.5%
- As-a-Service ACV TTM 1.0%
- As-a-Service Market Ratio TTM 37.0%

EMEA Commercial Sector ACV by Service Type ($B)

- ITO
  - 2Q19-1Q20: 9.2
  - 2Q18-1Q19: 7.5
  - 2Q17-1Q18: 9.2
- BPO
  - 2Q19-1Q20: 2.9
  - 2Q18-1Q19: 2.1
  - 2Q17-1Q18: 1.9
- SaaS
  - 2Q19-1Q20: 2.0
  - 2Q18-1Q19: 2.2
  - 2Q17-1Q18: 1.8
- IaaS
  - 2Q19-1Q20: 5.1
  - 2Q18-1Q19: 4.8
  - 2Q17-1Q18: 2.8
Quarterly Trends

- 1Q20 Combined Market up 8%; As-a-Service accounted for over 75% of activity for second consecutive quarter
- Managed Services sector remained tepid; down 27% against a difficult compare; Most geographies fell Y/Y
- As-a-service accelerated despite some demand constraints in China during the early part of the quarter

Combined Market Quarterly ACV ($B)

Asia Pacific Commercial Sector ACV by Service Type ($B)
## Global Commercial Sector Industry Award Trends

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Emerging Trends in Travel, Transportation, & Hospitality

“We live and work in a vastly different world than even just a month ago – one we could have never imagined.”

John Westfield
Partner & Practice Leader – Travel, Transportation, & Hospitality
Travel, Transportation, & Hospitality – Impact of COVID-19

Current State of the Industry

- **Cruise Ships Have Stopped Sailing**
  - Many Cruise Lines only have limited cash reserves

- **Hotel Occupancy Rates**
  - Have fallen 80-90% since the beginning of the COVID-19 pandemic

- **Airlines Reducing Schedules**
  - Many smaller travel agencies have already failed

Industry Response

- **Building Creative Revenue Streams & Social Responsibility Initiatives**
  - Cruise lines are turning ships into floating hospitals

- **Hotels Closing Properties**
  - Layoffs may cause workers to switch to less vulnerable industries

- **Increased Demand for Rail & Truck Cargo**
  - Airlines are using planes for critical supply cargo flights
Travel, Transportation, & Hospitality
These industries need cash on hand and are aggressively pushing partners for deep cost reductions

Innovative Customer Communication
There is unprecedented demand from contact centers

Cybersecurity Is a Concern
Companies want to ensure that assets, physical and digital, are protected from bad actors taking advantage of the pandemic

Enhanced Customer Loyalty Programs
Such as removing the expiration from earned travel rewards points, to help smooth customer relations
Travel, Transportation, & Hospitality – Environment Post COVID-19

- Digital Labor Augmentation
- Focus on Security of Data and Physical Assets
- Leverage Predictive Analytics
- Mobility Matters & IOT
- Infuse Innovation Into Multi-Provider Environments

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Key Takeaways

1. Enhance Customer Engagement Through Innovative Communication

2. Personalize Users’ Experience Leveraging Data Already Collected

3. Introduce Services that are Meaningful, Sustainable, & Innovative

4. Optimize and Modernize Assets, Infrastructure, Applications, & Processes

5. Maintain Relentless Focus on Digital & Physical Security
1Q20 ISG Index™ Inside Track from

*ISG* Insights™

"COVID-19 and the Future of Operational Resilience"

Stanton Jones
Director & Principal Analyst
ISG Research

"imagine your future®"
80% Of Provider Employees Working From Home

Governments Are Responding

Overall Service Delivery Rating

3.9*

80% Of Previous Productivity Levels

Source: ISG Research, March/April 2020

*1= unable to deliver, 5 = no change in services
How Are Enterprises Responding?

How Will COVID-19 Change New Technology Investments?

- **30%** No Impact to Plans
- **60%** Delay Technology Rollout ~ 90 Days

60% of Our Clients Expect to Return to Normal Operations Within 90-120 Days

COVID-19's Effect on Captive Centers

- China: 450
- Philippines: 700
- Asia Pac: 1,000
- India: 1,400

**Approximately 40% of Captive Centers have less than 500 people**

Source: ISG Research, March/April 2020

*1= unable to deliver, 5 = no change in services*
Operational Resilience – The Next Normal Operating Model

COVID-19 will accelerate transformation to the new operating model
Preparing for a COVID-19-level event from both an employee and customer perspective

Rush To Acquire Talent
- Proactively paying to recruit & retain talent
- Senior industry-specific digital expertise
- Talent-specific M&A activity

Preparing Employees
- Provide training and tools
- Reward systems in place for virtual workers
- Switch from face-to-face to in-person work quickly

Preparing Customers
- To engage physically & digitally
- Move seamlessly between them during emergency situations

Service Provider Ecosystem
- Shore up short term resiliency and cash positions
- Acquire underperforming captive centers and data centers
Key Themes – Operational Resilience

1. **Services are Stabilizing**, but Productivity is Down

2. **Short-term**: Delays in New Technology Spending

3. **Mid-term**: Enterprises Monetize Captive Centers

4. **Longer-term**: Enterprises use Digital Spending to Boost Resiliency

5. **Robust 3rd Party Ecosystem** will be Critical Source of Talent & Expertise
Summary and Outlook

Q2 Outlook

-28% Retail & Consumer Packaged Goods
-14% Financial Services
-16% Manufacturing
-45% Travel, Transport & Hospitality
-16% Telecom & Media
-8% Healthcare & Pharma
-16% Energy

Revised Market Outlook

-17% Managed Services 2Q20
-7% Managed Services 2020 Full Year
5% As-a-Service 2Q20
12% As-a-Service 2020 Full Year

Trends Outlook

- Supply chain resiliency and B2C solutions will accelerate ERP and digital solutions
- Poor performing captives will likely be monetized to provide a cash infusion and improvement in business resiliency, thus creating opportunities for service providers to expand their portfolios.
1. Click the "Listen by Phone" button.

2. The phone number and passcode will appear, and the web streaming to your computer will be automatically muted.

3. After you dial in, the operator will ask you for your name and company.

4. Now press *1 to be added to the queue.
Appendix

REGIONAL TECHNOLOGY PROVIDER STANDOUTS AND TCV SCORECARD
Our Contracts Knowledgebase™ is used to determine placements based on the annual value of commercial contracts awarded in the past 12 months.

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- AT&T
- Atos
- Capgemini
- Cognizant
- DXC Technology
- IBM Global Services
- Infosys
- NTT DATA
- TCS
- Alight Solutions
- Amdocs
- Cushman & Wakefield* 
- HCL
- OptumInsight
- SS&C Technologies*
- Tech Mahindra
- Teleperformance
- Wipro
- Atento
- EPAM Systems
- JLL
- LTI
- Mindtree
- Mphasis
- Sutherland
- Sykes
- TTEC
- Unisys
- Virtusa
- CSG Systems
- Ensono
- KPIT Technologies*
- Persistent Systems
- Startek

**As-a-Service Market**

- Amazon
- Google
- Microsoft
- Salesforce
- Intuit Inc.*
- Adobe Systems
- Equinix
- ServiceNow
- Workday
- Paychex
- Allscripts*
- Autodesk
- Digital Realty
- Ultimate Software*
- Ceridian HCM
- CyrusOne
- Flexential
- HubSpot*
- JDA Software*
- Paycom
- Proofpoint
- RingCentral
- Slack*

* New to leaderboard in 1Q20

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Service & Technology Provider Standouts – EMEA

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<td>Orange Business Services</td>
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**As-a-Service Market**

| Amazon | Adobe Systems | Autodesk | DocuSign* |
| Google | Equinix | | OVH |
| Microsoft | United Internet | | Visma* |

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The ISG Index has moved to TCV as the primary measure of the broader market. We will continue to provide a high-level TCV view of the market via a scorecard analysis.

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<td>-39%</td>
<td>24.2</td>
<td>11%</td>
</tr>
<tr>
<td>IaaS</td>
<td>5.9</td>
<td>18%</td>
<td>20.4</td>
<td>17%</td>
</tr>
<tr>
<td>SaaS</td>
<td>6.1</td>
<td>-4%</td>
<td>22.8</td>
<td>-7%</td>
</tr>
</tbody>
</table>

By Region

<table>
<thead>
<tr>
<th>Region</th>
<th>1Q20 TCV ($B)*</th>
<th>1Q Y/Y Change</th>
<th>TTM TCV ($B)*</th>
<th>TTM Y/Y Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Americas Combined</td>
<td>15.5</td>
<td>9%</td>
<td>63.3</td>
<td>3%</td>
</tr>
<tr>
<td>EMEA Combined</td>
<td>13.0</td>
<td>-6%</td>
<td>55.2</td>
<td>13%</td>
</tr>
<tr>
<td>Asia Pacific Combined</td>
<td>4.5</td>
<td>1%</td>
<td>16.9</td>
<td>11%</td>
</tr>
</tbody>
</table>

*Contracts with TCV ≥ $25M from the ISG Contracts Knowledgebase™
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