

COVID-19 Pulls Q2 Global Sourcing Market Down 5%

Global Market

Combined market of **\$13.2B** **▼ 5%**
on double-digit decline in managed services

Managed Services: **\$6.0B** **▼ 16%**

ITO: **▼ 10% (\$4.8B)**

BPO: **▼ 34% (\$1.2B)**

Contract volume: **445** **▼ 11%**

As-a-Service: **\$7.2B** **▲ 7%**

IaaS: **\$5.4B** **▲ 10.5%**

SaaS: **\$1.8B** **▼ 2%**

Top Industries for Sourcing*



Financial Services: \$5.6B **▼ 11%**



Business Services: \$5.3B **▲ 18%**



Manufacturing: \$4.3B **▲ 1%**



Telecom & Media: \$2.7B **▼ 2%**

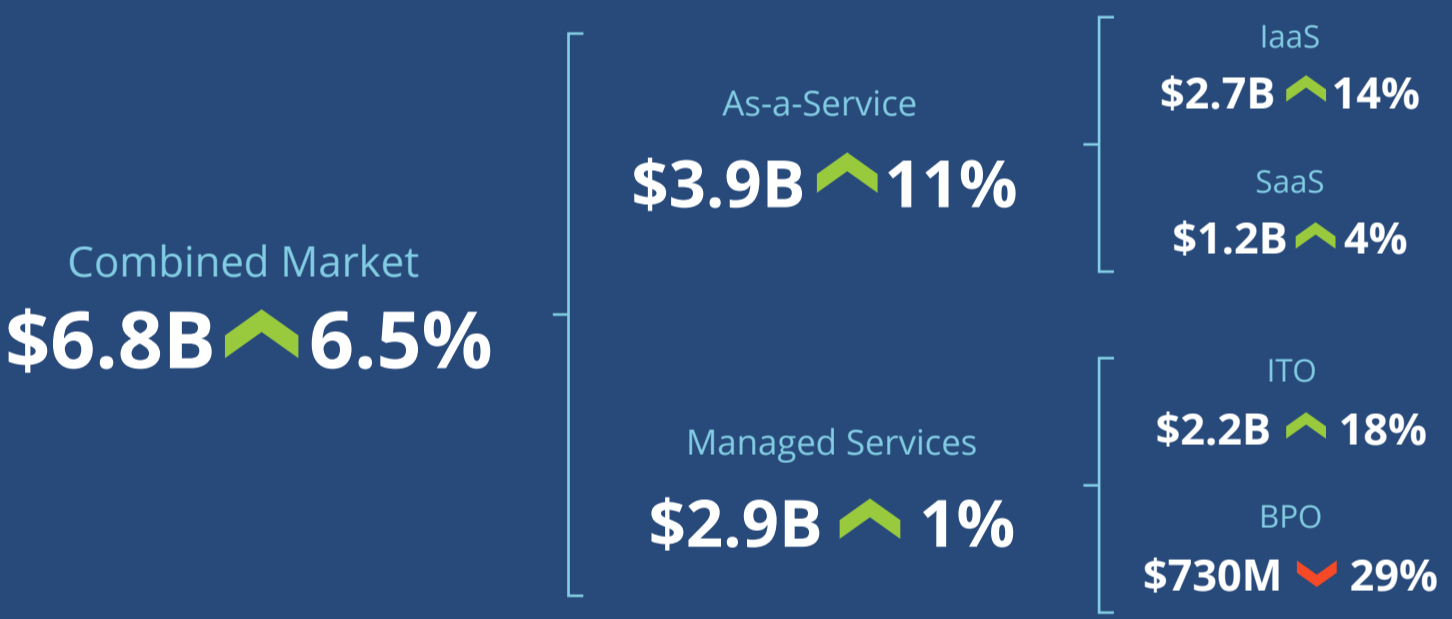
Fastest-Growing Industry for Sourcing*



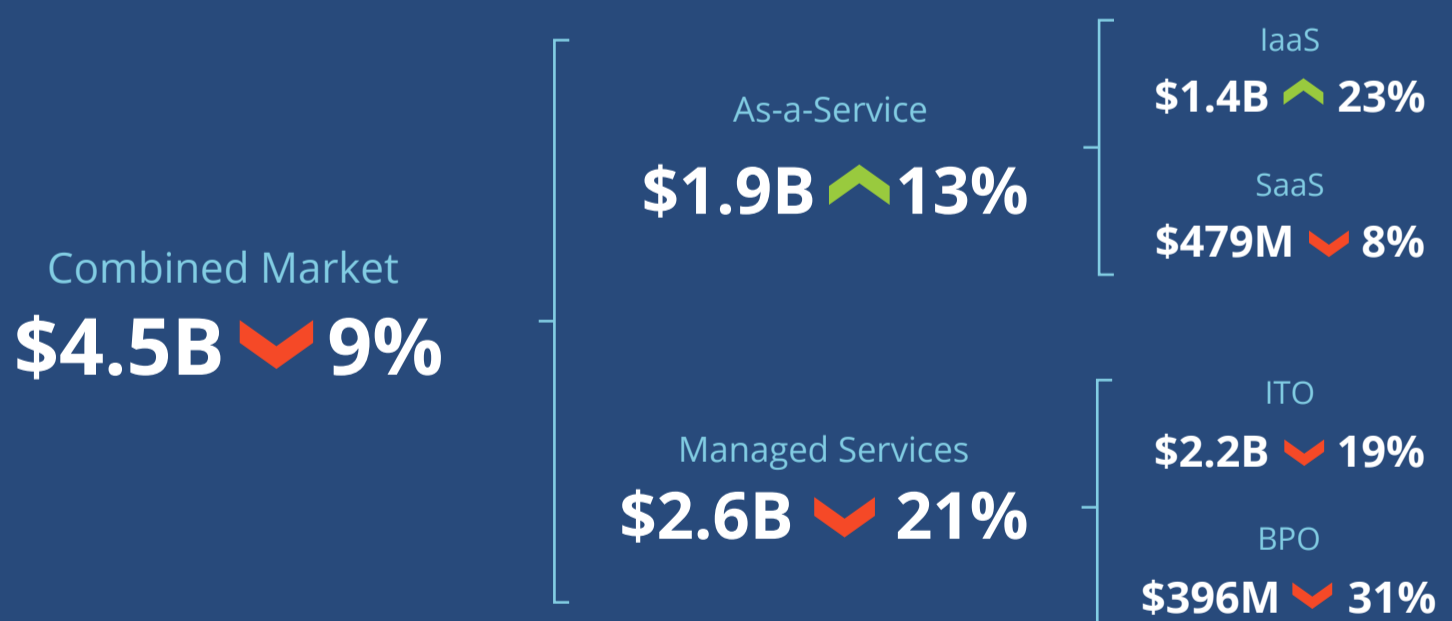
Business Services: ▲ 18% to \$5.3B

* 2020 YTD

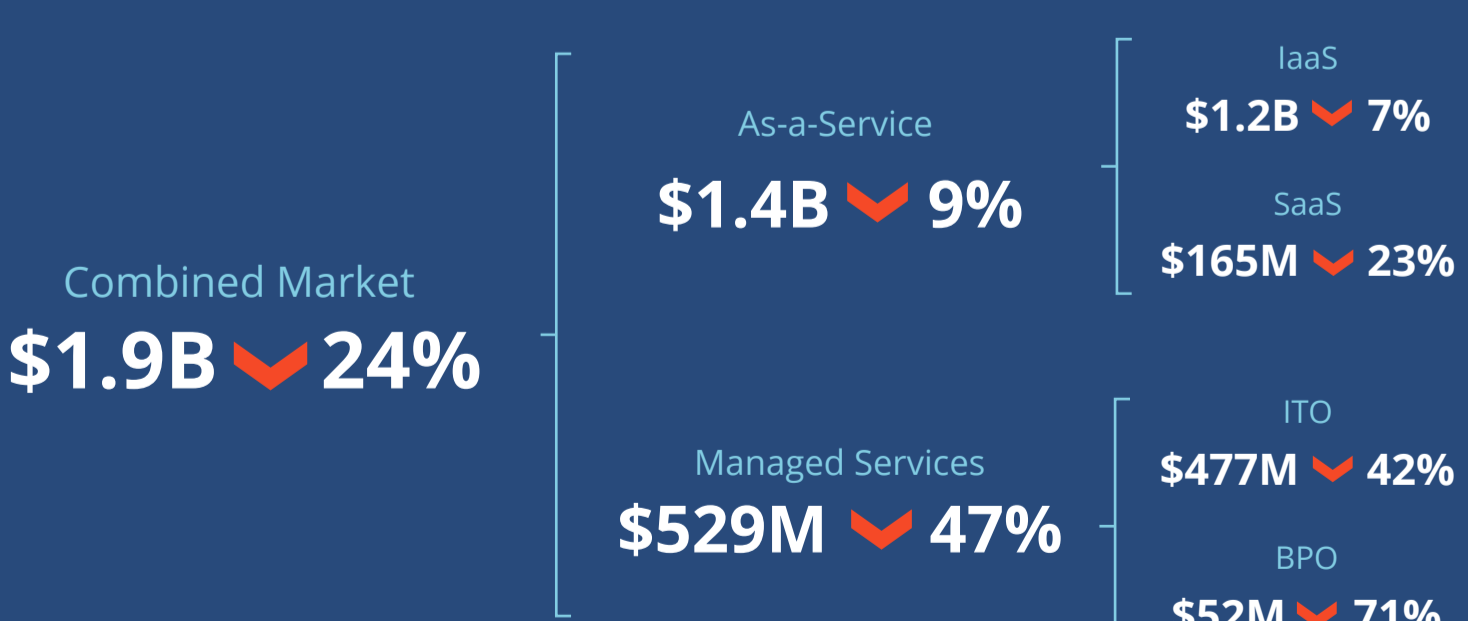
AMERICAS



EMEA



ASIA PACIFIC



Global Forecast: 2020

As COVID-19 still impacts the market ...

ISG forecasting slight sequential growth in Q3 & Q4
Managed Services expected to be down 7.5% for FY
 (compared with 7% decline forecast in April)