

**Global Market**

Combined market of **\$14.6B** **3%**  
on growth in cloud-based services

Although rebounding from Q2 slump, compared with 2019 ...

Managed Services: **\$6.6B** **5%**

ITO: **\$5.0B** **7%**

BPO: **\$1.6B** **1%**

Although flat with the prior quarter, compared with 2019 ...

As-a-Service: **\$8.0B** **10.5%**

IaaS: **\$5.9B** **14%**

SaaS: **\$2.1B** **2%**

**Top Industries for Sourcing (By ACV)\***



**Financial Services: \$9.1B** **6%**



**Business Services: \$8.3B** **12%**



**Manufacturing: \$6.5B** **1%**



**Retail & CPG: \$5.4B** **11%**

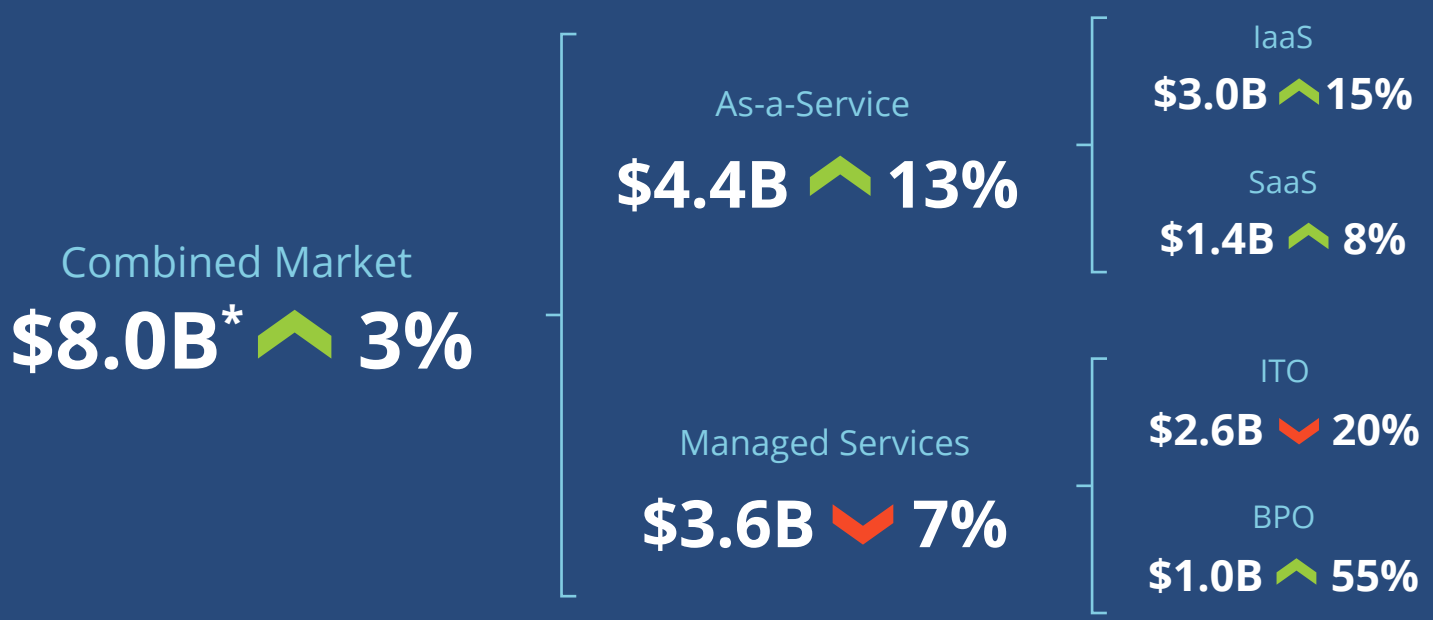
**Fastest-Growing Industry for Sourcing\***



**Energy: 14% to \$1.8B**

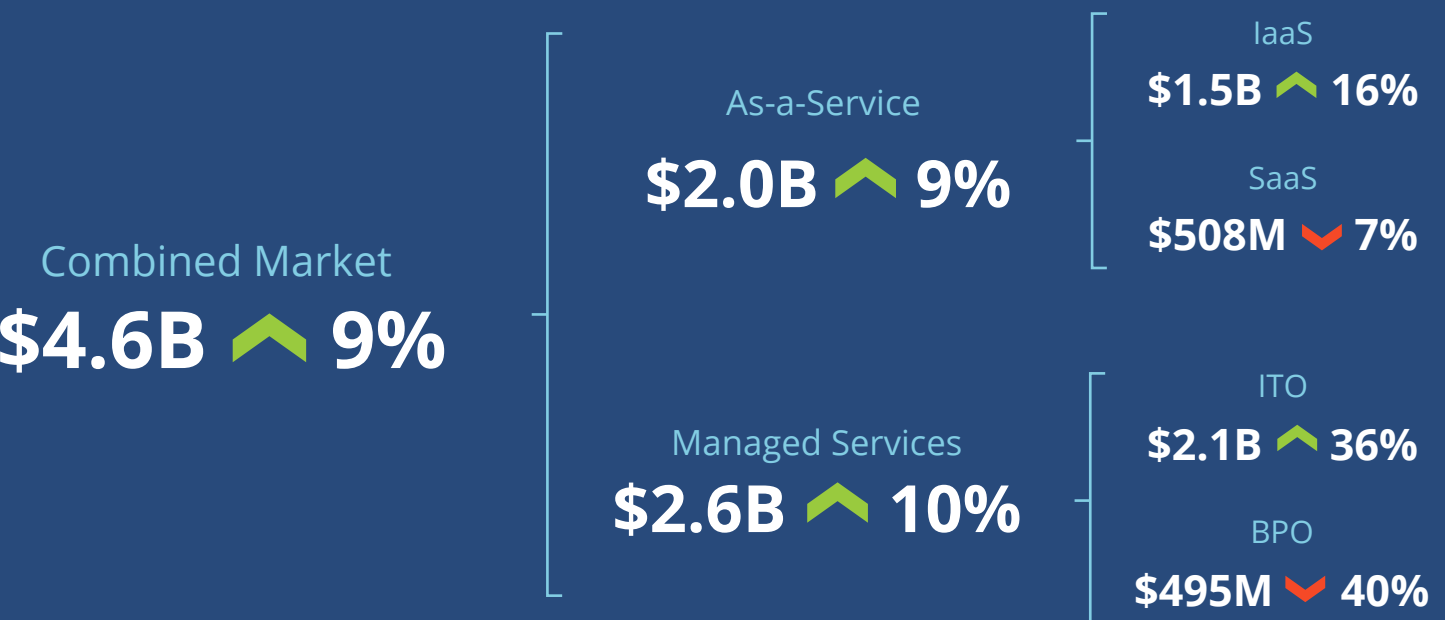
\* 2020 YTD

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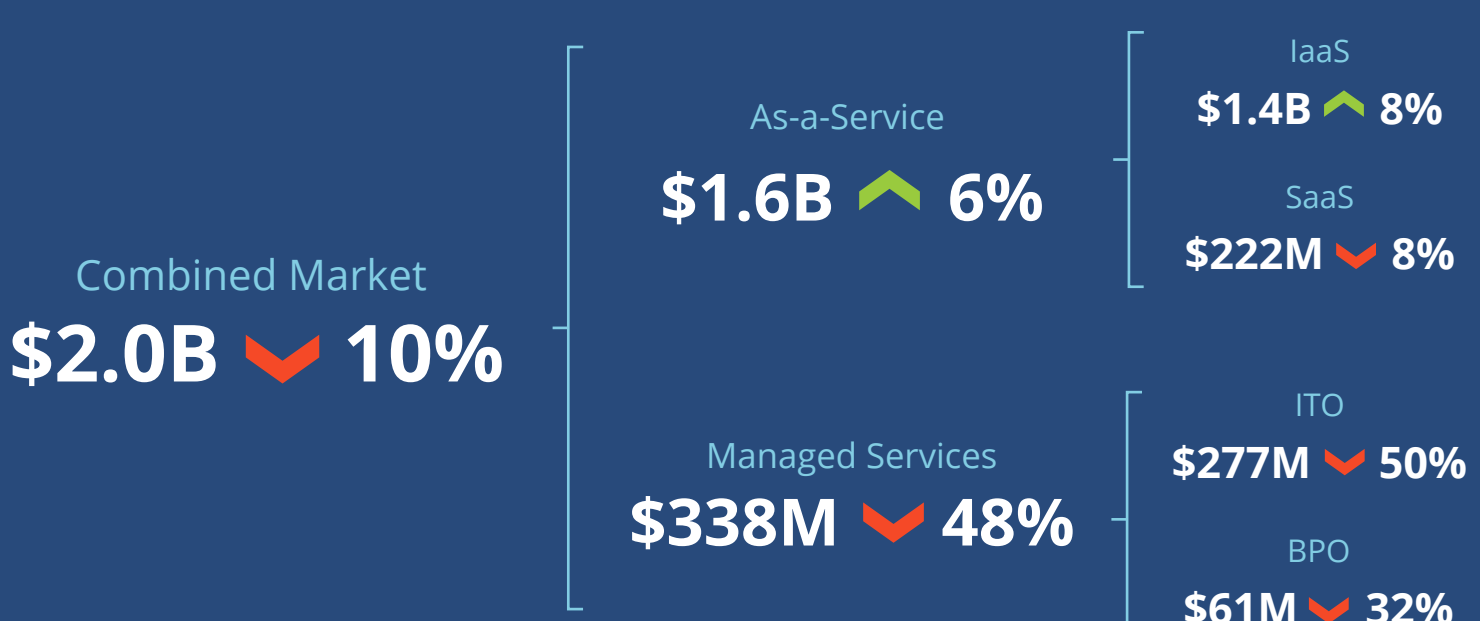


\* New Quarterly Record

**EMEA**



**ASIA PACIFIC**



**Global Forecast: 2020**

As COVID-19 still impacts the market, ISG is forecasting for the full year ...

**Managed Services** **6%**  
(vs. previous forecast of -7.5%)

**As-a-Service** **15.5%**  
(vs. previous forecast of +11%)