# **\* ISG** Index™ Global Sourcing Hits Record High in Q4

Global Market - Full Year

Commercial sourcing market at \$59.8B\* 7%

As-a-Service at \$33.2B\* 17%

laaS \$24.3B\* 23%, SaaS \$8.9B\* 4%

Managed Services at \$26.6B > 4%

ITO \$21.4В\* 2%, вро \$5.2В 23%

Number of contract awards: ITO (1,401), BPO (416)

\* New Annual Record

Global Market - 4Q

Combined market of \$16.0B\* 13%

As-a-Service market \$8.8B\* 24%

laaS \$6.5B\* 32%, SaaS \$2.3B 5%

Managed Services at \$7.2B \( \simes 3\%

ITO \$5.7В ~ 14%, вро \$1.4В 27%

\* New Quarterly Record

Top Industries (Full Year)





**Business Services** \$11.1B\* ^ 13%



Retail & CPG \$7.3B\* ^ 11%

\* New Annual Record

## **Americas**

Regional Markets

Combined Market

\$30.4B\* **^** 8%

**FY20** 

As-a-Service

\$17.9B\* 🖰 18.5%

Managed Services

\$12.5B **4**%

**FY20** 

Combined Market

As-a-Service

\* New Annual Record

Combined Market

**4Q20** 

\$7.2B ^ 4% As-a-Service

\$4.7B\* **^** 21%

**Managed Services** \$2.5B **\rightarrow** 17%

**EMEA** 

\$8.3B\* **^** 15%

\$12.1B ^ 2%

\* New Annual Record

**Managed Services** 

**FY20** 

Combined Market

\$6.2B\* <u>18%</u>

**4Q20** 

Combined Market

As-a-Service \$2.2B\* ^ 25%

**Managed Services** \$4.0B **^** 14%

4Q20

Combined Market

\$2.6B\* <u></u> 35%

\* New Quarterly Record

Asia Pacific

\$9.0B\* ^ 2% As-a-Service

\$6.9B\* 🦰 16%

**Managed Services** \$2.0B **>** 27%

\* New Annual Record

As-a-Service

\$1.9B\* <u></u> 30%

Managed Services \$641M ^ 55%

\* New Quarterly Record

Cloud-based services to grow 20%

Global Forecast: 2021

**Managed Services to grow 3%** 



The ISG Index™ is recognized as the authoritative source for marketplace intelligence on the global technology and business services industry. For 73 consecutive quarters, it has detailed the latest industry data and trends for financial analysts, enterprise buyers, software and service providers, law firms, universities and the media.

