

***ISG** Momentum[®]

Report Series

Annual Plan 2020 – 2021

***ISG**[®]
imagine your future[®]

About ISG

ISG (Information Services Group) (Nasdaq: [ISGI](#)) is a leading global technology research and advisory firm. A trusted business partner to more than 700 clients, including more than 75 of the top 100 enterprises in the world, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis. Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,300 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data. For more information, visit www.isg-one.com.

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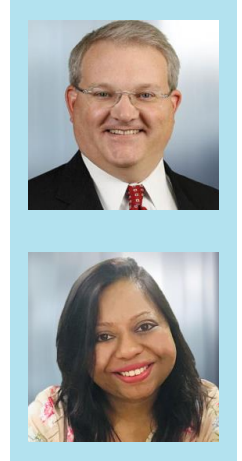
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Dear Clients,

Over the last few months, we've spoken to many of you, to understand the usage patterns and benefits of the Momentum Report Series. The feedback gathered was immensely useful and we value it. We appreciate all your support rendered and feedback received.

We heard you, and we are excited to announce the revamp of our Momentum Reports program. We are now delivering these quarterly reports in two new formats - one of them focuses on data and the other focuses on critical trends. This combination of insights and data provide go-to-market teams with both ISG insights and account-level data needed to support business development.



The new format is classified as the **"Sourcing Digest"** and **"Strategic Perspectives"**

1. Sourcing Digest

The **"Sourcing Digest"** works in concert with the ISG Contract KnowledgeBase that provides a contract and company level view. It is a comprehensive view of market activity, spending levels, and contracting trends for leading outsourced services.

The charts and graphics answer questions about market size and direction, which types of companies are spending, what outsourced services are they buying and which providers they are buying from. All the data in this report is based on ISG Pervasiveness Research and the ISG Contract KnowledgeBase.

Highlights – It includes insights on outsourcing spending behavior among the world's largest 2000 companies (Forbes G2000 clients)

- **11 major industries across 20+ countries** – Provides an industry-by-industry view of spending patterns, emerging preferences and other trends in countries across key geographies.
- **7 Service lines** – Application Development & Maintenance (ADM), Managed Network Services (MNS), Data Center, Workplace Services, Human Resources Outsourcing (HRO), Procurement, and Finance & Accounting (F&A).

2. Strategic Perspectives

The Strategic Perspectives provides perspective into each vertical and service-line through interviews with ISG strategists involved in current sourcing engagements and notes how current events are shaping each industry. Coverage on issues range from transformation, new governance approaches, digital strategy, digital labor, and customer plans and expectations.

It's a practitioner's approach in addition to academic research. Our reports leverage the strong and practical 'on-the-ground' experience from ISG advisors, based on their expertise in solving enterprise problems and understanding of service provider experience. These papers go beyond high-level academic market views and provide real actionable insights into a vertical and service line.

Read on for a sneak preview of the new reports...

Sourcing Digest

We understand that you highly appreciate the data we provide and it has been valuable to your company. Hence, we will continue to provide the data points that are critical for your organization's GTM or decision making. We are happy to know we are critical influencers and hence, the sourcing digest with lightly revamped content to address your needs.

Know what's new



Format of the report

- We will now combine industry vertical, geography and service line reports into one "Sourcing Digest" with critical data points retained in the same format.



Frequency of the report

- We are moving away from a quarterly report format to a bi-annual series
 - Q1 - An Annual Publication Focused on Forbes G2000 Buying Behavior.
 - Q3 - A Semi-Annual Publication focused on Forbes G2000 Buying Behavior.

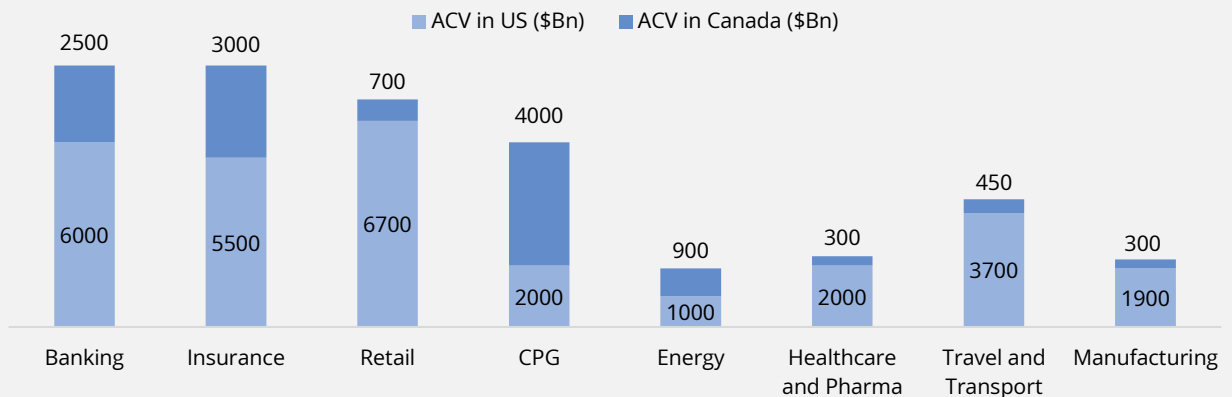


Benefits

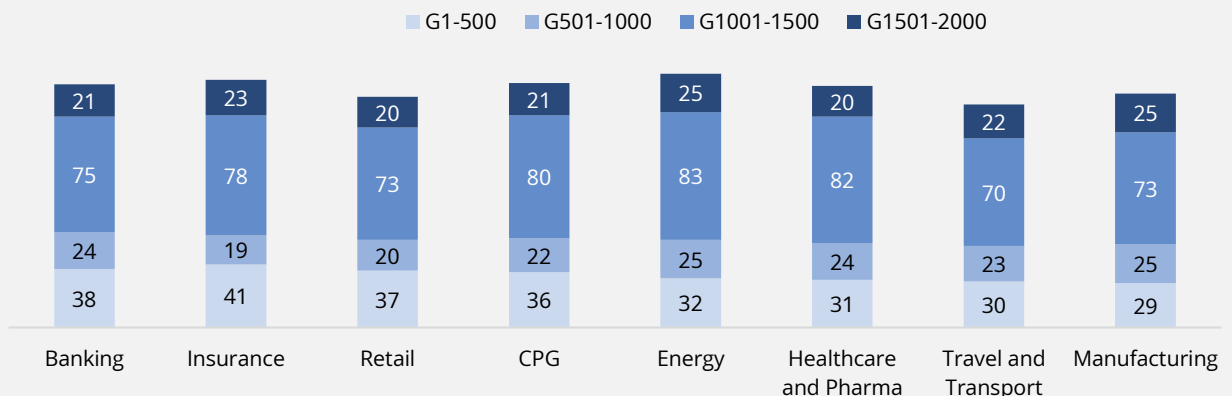
- The latest data in your hand for strategic planning sessions at the beginning of each year.
- View on vertical specific information diced by Geography and Country.
- Sneak Peek into Service-Line Spend diced by Geography.

A Preview of the New Refreshed Look

ACV in North America (by country) Across Verticals



Number of Companies Outsourcing by Forbes G2000 – Canada



Strategic Perspectives

The most exciting part of the revamp is the launch of new series called the “Strategic Perspectives”. In conjunction with our advisors and a team of experienced analysts, (some of them you know through the IPL program) these thought leadership papers will bring insights from both supply and demand side of the world. The insights will provide a view of emerging business drivers, new outsourcing opportunities etc.

Focus Areas	What will you learn?
Focuses on industry verticals and service lines	<ul style="list-style-type: none"> ● Our advisors on the ground, bring insights about enterprise challenges, success factors and other critical insights. ● On the other hand, our analysts work closely with service providers to understand what they have to offer to clients and the impactful benefits they have delivered to clients.
Focuses on changing outsourcing dynamics	<ul style="list-style-type: none"> ● With this industry changing so rapidly, these papers will focus on trends that impact the market.
Advice for structuring and managing relationships more effectively	<ul style="list-style-type: none"> ● You will learn all about the factors that are influencing enterprise buying behavior.
Technology advancement	<ul style="list-style-type: none"> ● Hear us talk of the latest kids on the block and recipes for success – Automation, Blockchain, AI etc.

A Preview of the New Refreshed Look
















Research Schedule and Agenda for 2020-2021

Sourcing Digest

- Annual Edition – March 2020
- Half-Yearly Edition – September 2020

Strategic Perspectives – Thought Papers 2020 Plan

Service Lines/Vertical		January – March	April – June	July – September	October – December
		Topics			
	ADM	The Essentials of Scaling DevOps	-	-	-
	BPO	-	Next Gen Customer Experience strategies – Driving Service Channel Optimization	-	Finance in Digital Age
	Blockchain	"Moving Past the Technological Hype: Design Thinking for Blockchain"	-	-	-
	Healthcare	"Unlocking the Healthcare Payer Market for Intelligent Automation"	-	-	-
	Lifesciences	-	Lifesciences goes intelligent	-	-
	Oil and Gas	Digital Centers of Excellence – An Opportunity for the Oil & Gas Industry	-	-	-
	Chemical	-	-	-	Use of digital technologies to build sustainable and innovative solutions and products
	Insurance	-	How can Insurance companies benefit from collaborating with the ecosystem (service providers and other insurance companies)? What is the governance play	-	-
	Banking	-	-	-	Ecosystem strategies for long term survival of Retail Banks
	Utilities	-	-	Sourcing and Agility – IP Rights Need To Be Considered	-
	Digital Workplace	-	-	Digital workplace contracts SLAs vs XLAs	-
	Manufacturing	-	Manufacturing/shop-floor/Plant – Automation and transparency, what does the operations/automation “dashboard” look like/imply/drive	-	-
	Travel and Transportation	-	-	How to manage off-schedule operations using AI and automation	-

Disclaimer: The publication timelines are indicative. There will be 12-14 thought-papers published as part of the Strategic Perspectives. Please note that the thought-papers mentioned in this plan are not final. These are subject to change based on market dynamics, advisors' inputs and analysts' views.

About the Team



Paul Reynolds
Provider Services
Practice Lead

List of Analysts for 2020



Aparna Gajanan
Senior Manager,
Provider Services



John Burnell
Principal Analyst



Sagnik Biswas
Lead Analyst



Sakshi Takkar
Lead Analyst



Praveen Nair
Lead Analyst



Aditi Abhijeet
Lead Analyst



Avimanyu Basu
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Akhila Harinarayan
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Sandeep Math
Lead Analyst



Mrinal Rai
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Lead Analyst



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