



imagine your future®



***ISG** Momentum®



Report Series

Annual Plan 2021 – 2022

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About ISG

ISG (Information Services Group) (Nasdaq: III) 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.

ISG Research

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value. For more information about ISG Research™ subscriptions, please email contact@isg-one.com, call +1.203.454.3900 or visit research.isg-one.com.

Dear Clients,

While 2020 has perhaps been the most unusual year for all of us and one of the most challenging in recent times, it has compelled businesses to run and connect with customers differently – almost overnight. As enterprises move from a “survive” to “thrive” strategy in 2021, we will continue to bring you insights that will be critical as organizations navigate a post-pandemic world. We will cover topics such as prioritization of technology spending, talent management, rethinking security, and the increased adoption of as-a-service models, among other key trends.

It has been a year since the revamp of our Momentum® Reports program. We presented quarterly reports in two refreshed formats: one focused on data (**Sourcing Digest**) and the other on trends shaping the future of business and consumers (**Strategic Perspectives**). This combination is meant to offer the most up-to-date content and equip your go-to-market teams with both ISG insights and account-level data to support business development.

As we enter a new year, our perspectives based on multiple client conversations indicate a renewed interest in all things digital, including automation and tools that enable working from home and remote collaboration. We will continue to bring cutting-edge insights through increased collaboration with ISG Advisors and our internal community.

As our program continues to witness rapid growth with increasing requests for webinars, workshops, white papers, location assessments (for captive/ service delivery), we would like to thank each of you for your continued support. We appreciate your feedback and look forward to a more enriching relationship in 2021.

Thank you.



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Sourcing Digest

The Sourcing Digest works in concert with the ISG Contract KnowledgeBase to provide perspectives on both contracts and companies. It is a comprehensive view of market activity, spending levels, and contracting trends for leading outsourced services.

2020

We saw a clear, strong and unwelcome effect on outsourcing contract activity in H1 2020.



COVID-19 continued to apply downward pressure on the industry as clients delayed projects and cut internal costs



Outsourcing spending showed strong signs of recovery during the later half of 2020 driven by the Infrastructure-as-a-service market



A view of all the industries that were hit hard, including CPG, Banking, Utilities and Oil & Gas

In 2021

We will continue to bring our observations of evolving client buying behavior.

As the sourcing industry continues to recover from its pandemic-related downturn, building agility, resiliency and transformation will be the common themes



We're seeing a flurry of deals that indicate a push to go digital. Enterprises continue to focus on cost takeout and applying savings to digital initiatives



The increase in number of transactions, strength in restructuring and an increase in mega-deals will help accelerate the ACV growth



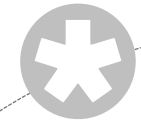
Frequency



Coverage

The Sourcing Digest includes insights on outsourcing spending behavior among the world's largest 2,000 companies.

7
Service
Lines



Application
Development
and Maintenance

Managed
Network Services

Data Center

Workplace Services

Human
Resources
Outsourcing

Procurement

Finance
and Accounting

16 major industries across more than **20** countries. Provides an industry-by-industry view of spending patterns, emerging preferences, and other trends in countries across key geographies.

Strategic Perspectives

These thought leadership papers take a practitioner's approach to both the supply and demand sides of the world. They include insights based on in-depth interviews with ISG strategists involved in current sourcing engagements and discuss how current events are shaping each industry.

In 2020

We brought you deep dives on industry and service-line trends, with insights on:



How amid the COVID-19 crisis enterprises shifted to virtual models that helped accelerate digital transformation



Enabling innovation with AI



How demand for increased flexibility and agility propelled enterprises towards a more flexible cloud-based model

In 2021

We will extend this conversation to include industry-wide insights on:

How organizations can digitize services quickly at scale to meet rising customer demands



The increasingly important role of hyper-specialization to gain competitive advantage


















Increasing use of automation to drive operational efficiency and improve business processes



Security solutions and services is expected to be a mega-growth opportunity over the next decade



Strategic Perspective 2021 Plan

Vertical/Service Line		January to March	April to June	July to September	October to December
		Topics			
	Digital Workplace	-	-	-	Workplace of the Future
	ADM	-	-	-	DevOps and Agile performance metrics
	BPO	-	Shaping the future of CX with Cognitive Contact Centers	-	Procurement/F&A
	Technology	Blockchain in Supply Chains	-	Cybersecurity	Cloud
	DataOps	-	Scaling DataOps - why standard DevOps approaches may not work	-	-
	Healthcare	-	Modernizing Technologies creates a future ready personalized member engagement opportunity	-	-
	Utilities	-	-	Oil & Gas/Chemicals	-
	Insurance	-	Primed for Disruption - Bringing innovation to an arcane policy driven Insurance Industry	-	-
	Banking	-	-	What are banks going to do with their real estate footprint	-
	Manufacturing	The new post-crisis paradigm for Manufacturing Operations - Rebooting with a "survive and thrive" strategy	-	-	-
	Travel and Transportation	-	Modernization of TTH technology (Moving from growing customer confidence to operating in post-COVID)	-	-
	CPG	Unlocking the value of AI-enabled demand planning and forecasting for CPG	-	-	-
	Life Science	-	-	Transitions to the cloud and new operating models	-
	Media and Entertainment	Gaming: The New Battleground for Consumer Mindshare	-	-	-
	Pricing	ITO Pricing Trends	-	-	-

Disclaimer: The publication timelines are indicative. There will be 15 to 17 thought-papers published as part of the Strategic Perspectives Series. 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.

Why Momentum Reports?



ISG Momentum® Reports is uniquely positioned to help you to

- Develop go-to-market strategies
- Identify market opportunities
- Understand the nuances of the sourcing landscape to support business development



Subscribing to ISG Momentum® Reports will give you access to:

- Research fueled by ISG proprietary data
- Insights from ISG Industry Experts
- The most accurate market trends
- Exhaustive intelligence on the sourcing markets



Do the right contacts in your organization have access to ISG Research?

- Functional Leads
- Account Leads
- Competitive intelligence teams
- Head of strategy
- Vertical Leads

ISG Momentum® Reports will equip you with a wealth of data and market analysis that is critical to your organization's GTM/decision making. Do not miss out on these topical insights from ISG. [Register Now.](#)

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WELCOME NEW PRODUCTS (152)

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Visitors to this site can interact directly with our research, create their own curated library, and compile and export content.

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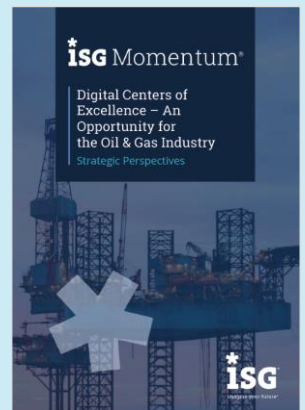
See how it works

Please note: Some documents returned in a standard search will show a badge as "Archived". These are documents dated 2015 and prior. We display these documents for reference and relevance for some clients and regions. Documents marked as Archived may not be subject to the same levels of expert support as current documents.

Questions?

If you are interested in subscribing to ISG Research™ or have a question please contact us. If you would like to benefit from access to additional Research material relating to Digital Case Studies, please "Register" using the link at the top right hand side of the screen.

Momentum Publications in 2020



Meet the Team



Paul Reynolds
Provider Services
Practice Lead

List of Analysts for 2021



Aparna Gajanan
Senior Manager,
Principal Analyst



John Burnell
Principal Analyst



Shashank Rajmane
Lead Analyst



Sagnik Biswas
Lead Analyst



Praveen Nair
Lead Analyst



Aditi Abhijeet
Lead Analyst



Bharti Nagraj
Specialist



Sakshi Takkar
Lead Analyst



Vaibhavi Vijaykumar
Lead Analyst



Mrinal Rai
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Anuradha Acharya
Lead Analyst



Ammar Mohammed
Lead Analyst



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