

Global Market

Combined market exceeds \$13B for the first time;
reaches record **\$13.5B** **▲ 12%**

As-a-Service establishes new record: **\$6.5B** **▲ 26%**

IaaS at record high: **\$4.9B** **▲ 37%**

SaaS at record high: **\$1.6B** **▲ 1%**

Traditional Sourcing market: **\$7.0B** **▲ 2%**

ITO **▲ 7%**, BPO **▼ 14%**

Contract volume **▼ 11%**

Top Industries for Sourcing*



Financial Services: \$10.9B **▲ 17%**



Business Services: \$8.8B **▲ 29%**



Manufacturing: \$8.0B **▲ 19%**



Healthcare & Pharma: \$4.8B **▲ 34%**

Fastest-Growing Industry for Sourcing*



Retail: ▲ 35% to \$3.2B

* Trailing 12 months

AMERICAS DATA

Combined Market
\$6.6B **▲ 1%**

As-a-Service
\$3.4B* **▲ 25%**

Traditional
\$3.2B **▼ 16%**

IaaS
\$2.4B* **▲ 39%**

SaaS
\$1.0B* **▲ 2%**

ITO
\$2.5B **▼ 13%**

BPO
\$700M **▼ 27%**

* New Quarterly Record

EMEA DATA

Combined Market
\$4.9B* **▲ 23%**

As-a-Service
\$1.8B* **▲ 21%**

Traditional
\$3.2B **▲ 24%**

IaaS
\$1.3B* **▲ 33%**

SaaS
\$433M **▼ 4%**

ITO
\$2.5B **▲ 26%**

BPO
\$632M **▲ 17%**

* New Quarterly Record

ASIA PACIFIC DATA

Combined Market
\$2.0B **▲ 33%**

As-a-Service
\$1.4B* **▲ 33%**

Traditional
\$631M **▲ 34%**

IaaS
\$1.2B* **▲ 37%**

SaaS
\$190M* **▲ 14%**

ITO
\$531M **▲ 71%**

BPO
\$101M **▼ 38%**

* New Quarterly Record

Global Forecast: 2019

**25% As-a-Service growth expected,
paced by strong demand for IaaS**

Traditional Sourcing expected to grow 3.2%