

**Global Market**

Combined market exceeds \$14B for the first time; reaches record **\$14.8B ▲ 7%**

As-a-Service establishes new record: **\$7.9B ▲ 11%**

IaaS at record high: **\$5.9B ▲ 18%**

SaaS: **\$2.0B ▼ 4%**

Managed Services: **\$6.8B ▲ 2%**

(On pace for \$7.3B but slowed by COVID-19 concerns in March)

ITO: **▲ 11%**, BPO: **▼ 30%**

Contract volume: **447 ▲ 4%**

**Top Industries for Sourcing\***



**Financial Services: \$11.3B — 0%**



**Business Services: \$9.9B ▲ 12%**



**Manufacturing: \$8.4B ▲ 2%**



**Retail & CPG: \$6.5B ▼ 1%**

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



**Telecom & Media: ▲ 30% to \$5.8B**

\* Trailing 12 months

**AMERICAS**

Combined Market  
**\$7.6B\* ▲ 9%**

As-a-Service  
**\$4.2B\* ▲ 11%**

Managed Services  
**\$3.4B ▲ 6%**

IaaS  
**\$2.9B\* ▲ 17%**

SaaS  
**\$1.3B\* ▲ 1%**

ITO  
**\$2.8B ▲ 11%**

BPO  
**\$624M ▼ 13%**

\* New Quarterly Record

**EMEA**

Combined Market  
**\$4.9B ▲ 4%**

As-a-Service  
**\$2.0B\* ▲ 1%**

Managed Services  
**\$2.9B ▲ 6%**

IaaS  
**\$1.5B\* ▲ 7%**

SaaS  
**\$518M ▼ 13%**

ITO  
**\$2.6B ▲ 23%**

BPO  
**\$314M ▼ 51%**

\* New Quarterly Record

**ASIA PACIFIC**

Combined Market  
**\$2.2B ▲ 8%**

As-a-Service  
**\$1.7B\* ▲ 25%**

Managed Services  
**\$522M ▼ 27%**

IaaS  
**\$1.5B\* ▲ 32%**

SaaS  
**\$213M ▼ 8%**

ITO  
**\$438M ▼ 27%**

BPO  
**\$84M ▼ 26%**

\* New Quarterly Record

**Global Forecast: 2020**

On Coronavirus Concerns ...

**As-a-Service expected to grow 12%**  
(down from 23.5% growth forecast in January)

**Managed Services expected to be down 7%**  
(compared with 3.2% growth forecast in January)