

Europe Embracing the Cloud

41%

Q1 2020

34%

Q1 2018

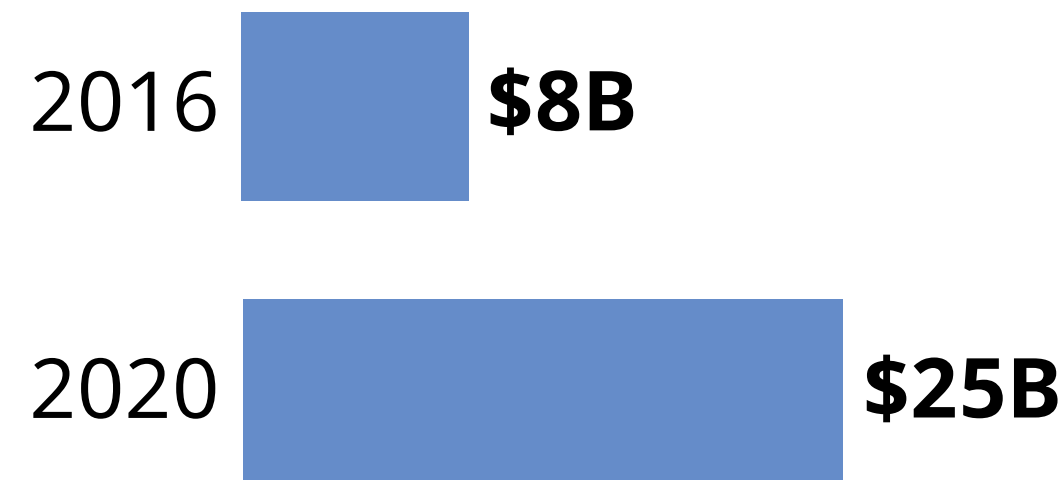
IaaS and SaaS
growing as a
percentage of
IT and business
services spend

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From Data Centers to the Cloud

IaaS spending up 3X since 2016,
while managed services relatively flat

IaaS ACV



Managed Services ACV



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Hyperscalers Growing, But for How Long?

Hyperscaler ACV growth slowing after early surge in public cloud adoption

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