

**Global Market**

Combined market exceeds \$13B for 3rd straight quarter, reaches **\$13.7B** **▲ 5%**

As-a-Service has 2nd best quarter ever: **\$6.7B** **▲ 14%**

IaaS: **\$4.9B** **▲ 14%**

SaaS at record high: **\$1.8B** **▲ 14%**

Managed Services market: **\$7.0B** **▼ 3%**

ITO **▼ 7%**, BPO **▲ 14%**

Contract Volume: **491** **▲ 1%**

**Top Industries for Sourcing\***



**Financial Services: \$6.1B** **▲ 5%**



**Business Services: \$4.6B** **▲ 17%**



**Manufacturing: \$4.3B** **▲ 32%**



**Telecom & Media: \$2.7B** **▲ 20%**

**Greatest Adoption of As-a-Service\***



**Business Services: 81% of Combined ACV**

\*6M YTD

**AMERICAS**

Combined Market  
**\$6.5B** **▲ 6%**

As-a-Service  
**\$3.7B\*** **▲ 23%**

Managed Services  
**\$2.8B** **▼ 10%**

IaaS **\$2.6B** **▲ 29%**  
SaaS **\$1.1B\*** **▲ 12%**  
ITO **\$1.8B** **▼ 22%**  
BPO **\$1.0B** **▲ 25%**

\* New Quarterly Record

**EMEA**

Combined Market  
**\$5.0B** **▲ 3%**

As-a-Service  
**\$1.8B** **▲ 9%**

Managed Services  
**\$3.2B** **▼ 1%**

IaaS **\$1.3B** **▲ 7%**  
SaaS **\$491M\*** **▲ 16%**  
ITO **\$2.7B** **▲ 2%**  
BPO **\$509M** **▼ 14%**

\* New Quarterly Record

**ASIA PACIFIC**

Combined Market  
**\$2.2B\*** **▲ 6%**

As-a-Service  
**\$1.3B** **— 0%**

Managed Services  
**\$968M** **▲ 15%**

IaaS **\$1.1B** **▼ 3%**  
SaaS **\$206M\*** **▲ 18%**  
ITO **\$787M** **▲ 4%**  
BPO **\$181M** **▲ 113%**

\* New Quarterly Record

**Global Forecast: 2019**

**22% As-a-Service growth expected**

**IT and Business Services expected to grow 3.5%**