

Cloud-Based-Services Continue to Pace Global Sourcing Growth

Global Market

Combined market reaches **\$11.7B** **▲ 19%**

As-a-Service at a record **\$5.7B** **▲ 47%**

Record IaaS: **\$4.2B** **▲ 53%**


SaaS: **\$1.5B** **▲ 34%**

Traditional market: **\$6.0B (flat)**

ITO **▲ 10%**, BPO **▼ 30%**

400 contracts signed

Top Industries for Sourcing*

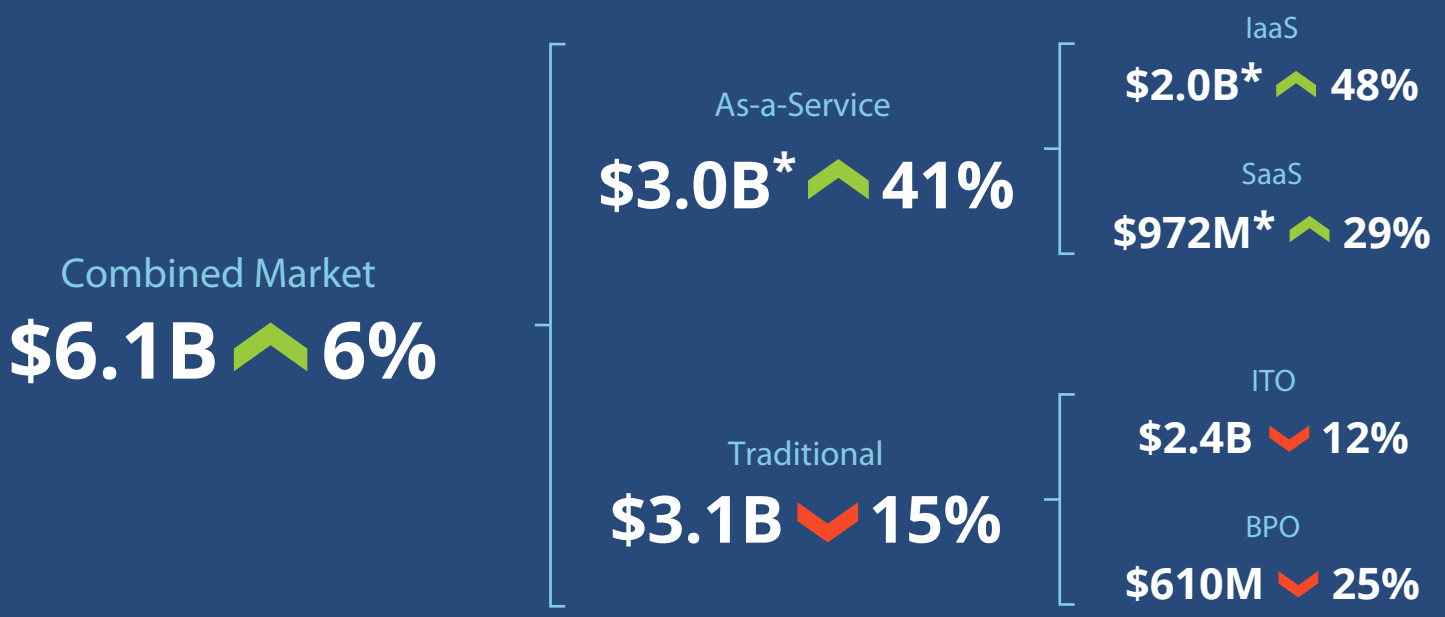
-  **Financial Services \$8.4B** **▲ 24%**
-  **Manufacturing \$4.5B** **▼ 11%**
-  **Healthcare \$3.5B** **▲ 54%**

Fast-Growing Sectors for Sourcing*

-  **Retail** **▲ 55%** to **\$2.2B**
-  **CPG** **▲ 34%** to **\$2.1B**

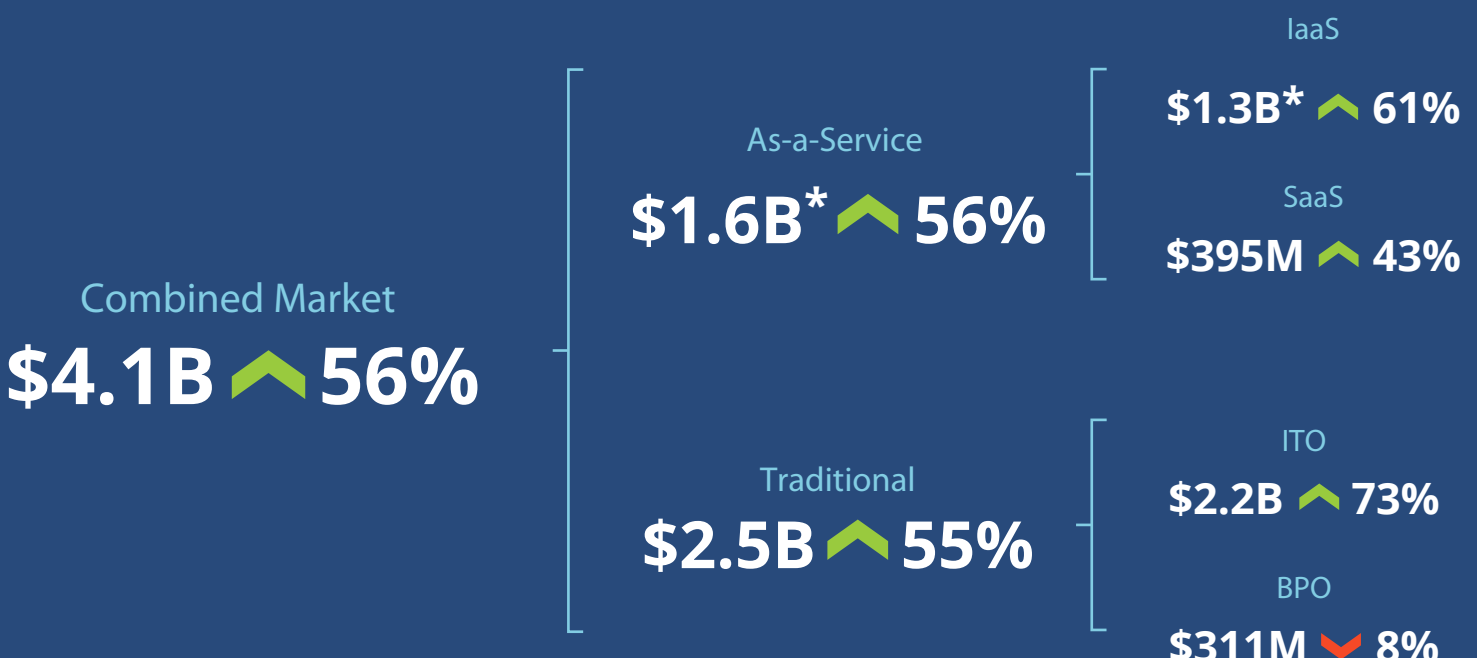
* Nine Months YTD 2018

Americas



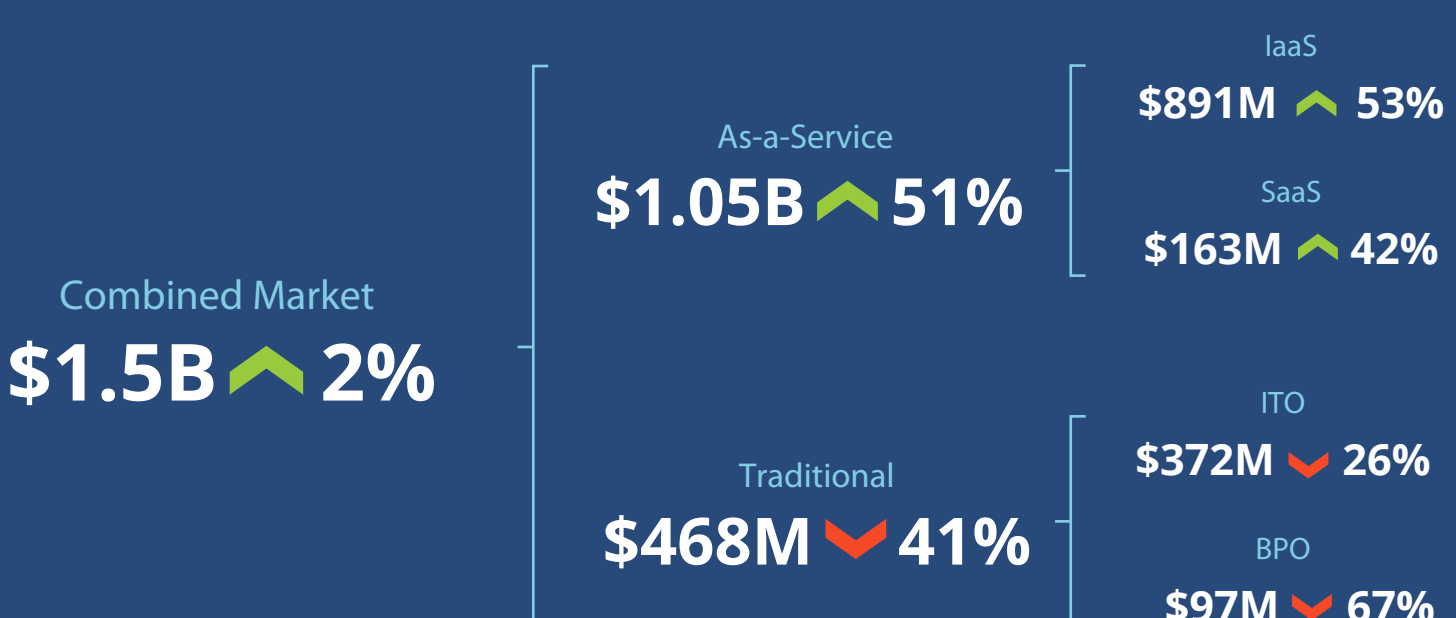
* New Quarterly Record

EMEA



* New Quarterly Record

Asia Pacific



* New Quarterly Record

Global Forecast: 2018

45%+ Public Cloud growth expected; 30%+ overall for IaaS

17% growth in SaaS

Traditional Sourcing expected to grow ~4%