

**Global Market**

Combined market exceeds \$13B for 3rd straight quarter, reaches **\$13.8B** **▲ 13%**

As-a-Service generates record ACV: **\$7.1B** **▲ 19%**

IaaS at record high: **\$5.3B** **▲ 22%**

SaaS: **\$1.8B** **▲ 11%**

Managed Services market: **\$6.7B** **▲ 7%**

ITO: **\$5.1B** **▼ 2%**

BPO: **\$1.6B** **▲ 53%**

Contract Volume: **411** **▼ 2%**

**Top Industries for Sourcing\***



**Financial Services: \$8.4B — 0%**



**Business Services: \$7.2B ▲ 17%**



**Manufacturing: \$6.4B ▲ 31%**



**Telecom & Media: \$4.5B ▲ 35%**

\*9M YTD

**AMERICAS**

Combined Market  
**\$7.7B\*** **▲ 25%**

As-a-Service  
**\$3.8B\*** **▲ 26%**

Managed Services  
**\$3.9B\*** **▲ 24%**

IaaS  
**\$2.7B\*** **▲ 33%**

SaaS  
**\$1.1B\*** **▲ 12%**

ITO  
**\$3.2B\*** **▲ 27%**

BPO  
**\$697M** **▲ 12%**

\* New Quarterly Record

**EMEA**

Combined Market  
**\$4.1B** **▼ 7%**

As-a-Service  
**\$1.8B\*** **▲ 10%**

Managed Services  
**\$2.3B** **▼ 17%**

IaaS  
**\$1.3B** **▲ 12%**

SaaS  
**\$473M** **▲ 5%**

ITO  
**\$1.5B** **▼ 39%**

BPO  
**\$784M** **▲ 152%**

\* New Quarterly Record

**ASIA PACIFIC**

Combined Market  
**\$2.0B** **▲ 20%**

As-a-Service  
**\$1.4B\*** **▲ 14%**

Managed Services  
**\$632M** **▲ 35%**

IaaS  
**\$1.2B** **▲ 13%**

SaaS  
**\$206M** **▲ 17%**

ITO  
**\$543M** **▲ 46%**

BPO  
**\$89M** **▼ 8%**

\* New Quarterly Record

**Global Forecast: 2019**

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

**IT and Business Services expected to grow 2.6%**