

**Global Market – Full Year**

Commercial sourcing market **\$47.8B\*** **▲ 18%**

Surging demand for cloud solutions drives

As-a-Service to record **\$21.8B** **▲ 43%**

IaaS **\$15.8B\*** **▲ 47%**, SaaS **\$6.0B\*** **▲ 34%**

Traditional Sourcing at **\$26.0B** **▲ 2%**

ITO **\$19.9B** **▲ 4%**, BPO **\$6.0B** **▼ 2%**

Record number of ITO (**1,332**) and BPO (**495**) contracts

\* Record

**Global Market – 4Q**

Combined market **\$12.3B** **▲ 18%**

As-a-Service market **\$5.9B\*** **▲ 44%**

IaaS **\$4.3B\*** **▲ 45%**, SaaS **\$1.6B\*** **▲ 40%**

Traditional Sourcing at **\$6.4B** **▲ 2%**

ITO **\$4.5B** **▼ 5%**, BPO **\$1.9B** **▲ 22%**

\* Quarterly Record

**Top Industries**



**Financial Services** **\$10.7B** **▲ 17.6%**



**Manufacturing** **\$7.0B** **▲ 8.3%**



**Healthcare & Pharma** **\$4.6B** **▲ 48.6%**



**Telecom & Media** **\$4.2B** **▲ 0.9%**

**Regional Markets**

**Americas**

**FY18**

Combined Market **\$25.0B\*** **▲ 21%**

As-a-Service **\$11.5B\*** **▲ 37%**

Traditional **\$13.6B\*** **▲ 10%**

\* New Annual Record

**4Q18**

Combined Market **\$6.8B\*** **▲ 23%**

As-a-Service **\$3.2B\*** **▲ 45%**

Traditional **\$3.6B** **▲ 9%**

\* New Quarterly Record

**EMEA**

**FY18**

Combined Market **\$16.0B\*** **▲ 9%**

As-a-Service **\$6.1B\*** **▲ 47%**

Traditional **\$9.9B** **▼ 7%**

\* New Annual Record

**4Q18**

Combined Market **\$3.7B** **▲ 5%**

As-a-Service **\$1.6B\*** **▲ 39%**

Traditional **\$2.1B** **▼ 12%**

\* New Quarterly Record

**Asia Pacific**

**FY18**

Combined Market **\$6.7B\*** **▲ 30%**

As-a-Service **\$4.2B\*** **▲ 55%**

Traditional **\$2.5B** **▲ 3%**

\* New Annual Record

**4Q18**

Combined Market **\$1.8B** **▲ 35%**

As-a-Service **\$1.1B\*** **▲ 47%**

Traditional **\$717M** **▲ 20%**

\* New Quarterly Record

**Global Forecast: 2019**

**Public Cloud Infrastructure to grow 25%**

**SaaS to grow 17%**

**Traditional Sourcing to grow 4.5%**