

Global Market – Full Year

Commercial sourcing market at **\$55.7B* ^ 10%**

As-a-Service at **\$28.0B* ^ 21%**

IaaS **\$20.5B* ^ 23%**, SaaS **\$7.5B* ^ 15%**

Managed Services at **\$27.7B* ^ 2%**

ITO **\$20.9B v 1%**, BPO **\$6.8B ^ 9%**

Number of contract awards: ITO **(1,279)**, BPO **(492)**

* New Annual Record

Global Market – 4Q

Combined market of **\$13.9B ^ 7%**
but down from record 3Q of \$14.2B

As-a-Service market **\$7.0B ^ 14%**

IaaS **\$4.8B ^ 8%**, SaaS **\$2.2B* ^ 31%**

Managed Services at **\$6.9B ^ 0.1%**

ITO **\$5.0B ^ 1%**, BPO **\$1.9B v 2%**

* New Quarterly Record

Top Industries (Full Year)



Financial Services \$11.4B* ^ 7%



Business Services \$9.6B* ^ 14%



Manufacturing \$8.1B* ^ 8%



Retail & CPG \$6.6B* ^ 4%

* New Annual Record

Regional Markets

Americas

FY19

Combined Market

\$27.9B* ^ 8%

As-a-Service

\$14.9B* ^ 23%

Managed Services

\$13.0B v 5%

* New Annual Record

4Q19

Combined Market

\$6.7B v 3%

As-a-Service

\$3.7B ^ 14%

Managed Services

\$3.0B v 18%

EMEA

FY19

Combined Market

\$19.0B* ^ 10%

As-a-Service

\$7.1B* ^ 13%

Managed Services

\$11.9B ^ 8%

* New Annual Record

4Q19

Combined Market

\$5.2B* ^ 25%

As-a-Service

\$1.7B ^ 5%

Managed Services

\$3.5B ^ 39%

* New Quarterly Record

Asia Pacific

FY19

Combined Market

\$8.8B* ^ 20%

As-a-Service

\$6.0B* ^ 25%

Managed Services

\$2.8B ^ 10%

* New Annual Record

4Q19

Combined Market

\$2.0B ^ 2%

As-a-Service

\$1.6B* ^ 26%

Managed Services

\$414M v 41%

* New Quarterly Record

Global Forecast: 2020

Cloud-based services to grow 23.5%

Managed Services to grow 3.2%