

**Global Market – Full Year**

Commercial sourcing market at **\$59.8B\* ^ 7%**

As-a-Service at **\$33.2B\* ^ 17%**

IaaS **\$24.3B\* ^ 23%**, SaaS **\$8.9B\* ^ 4%**

Managed Services at **\$26.6B v 4%**

ITO **\$21.4B\* ^ 2%**, BPO **\$5.2B v 23%**

Number of contract awards: ITO **(1,401)**, BPO **(416)**

\* New Annual Record

**Global Market – 4Q**

Combined market of **\$16.0B\* ^ 13%**

As-a-Service market **\$8.8B\* ^ 24%**

IaaS **\$6.5B\* ^ 32%**, SaaS **\$2.3B ^ 5%**

Managed Services at **\$7.2B ^ 3%**

ITO **\$5.7B ^ 14%**, BPO **\$1.4B v 27%**

\* New Quarterly Record

**Top Industries (Full Year)**



**Financial Services \$12.0B\* ^ 4%**



**Business Services \$11.1B\* ^ 13%**



**Manufacturing \$10.0B\* ^ 22%**



**Retail & CPG \$7.3B\* ^ 11%**

\* New Annual Record

**Regional Markets**

**Americas**

**FY20**

Combined Market

**\$30.4B\* ^ 8%**

As-a-Service

**\$17.9B\* ^ 18.5%**

Managed Services

**\$12.5B v 4%**

\* New Annual Record

**4Q20**

Combined Market

**\$7.2B ^ 4%**

As-a-Service

**\$4.7B\* ^ 21%**

Managed Services

**\$2.5B v 17%**

**EMEA**

**FY20**

Combined Market

**\$20.5B\* ^ 7%**

As-a-Service

**\$8.3B\* ^ 15%**

Managed Services

**\$12.1B ^ 2%**

\* New Annual Record

**4Q20**

Combined Market

**\$6.2B\* ^ 18%**

As-a-Service

**\$2.2B\* ^ 25%**

Managed Services

**\$4.0B ^ 14%**

\* New Quarterly Record

**Asia Pacific**

**FY20**

Combined Market

**\$9.0B\* ^ 2%**

As-a-Service

**\$6.9B\* ^ 16%**

Managed Services

**\$2.0B v 27%**

\* New Annual Record

**4Q20**

Combined Market

**\$2.6B\* ^ 35%**

As-a-Service

**\$1.9B\* ^ 30%**

Managed Services

**\$641M ^ 55%**

\* New Quarterly Record

**Global Forecast: 2021**

**Cloud-based services to grow 20%**

**Managed Services to grow 3%**