

**Citizen Services AI Market by Technology (ML, NLP, Image Processing and Face Recognition), Vertical (Transportation, Healthcare, Government & Public Sector, Energy & Utilities, Agriculture, and Education & Training) and Region - Global Forecast to 2027**

Market Report | 2022-11-07 | 259 pages | MarketsandMarkets

**AVAILABLE LICENSES:**

- Single User \$4950.00
- Multi User \$6650.00
- Corporate License \$8150.00
- Enterprise Site License \$10000.00

**Report description:**

The global citizen services AI market is projected to grow from USD 6.5 Billion in 2022 to USD 41.0 Billion by 2027, at a CAGR of 44.5% during the forecast period. Governments across the globe had begun to adopt cutting-edge technologies, such as artificial intelligence (AI) and machine learning (ML), to hasten the delivery of a number of citizen services. The concept is to actively bring those services to citizens, rather than waiting for citizens to request government services.

The use of AI in the public sector can improve governing bodies' day-to-day operations as well as facilitate efficient long-term planning that will help the government take on more challenging and long-term social and cultural challenges.

The major market players, such as IBM, Microsoft, ServiceNow, AWS, and Accenture, have adopted numerous growth strategies, which include acquisitions, new product launches, product enhancements, and business expansions, to enhance their market shares.

By deployment mode, cloud segment to lead market during forecast period

The cloud-based citizen services AI deployment mode is an economical and effective approach for enterprises to handle big data concerns. There is also a shift from traditional on-premises voice biometrics solutions to cloud-based AI solutions across large enterprises and SMEs, due to the increasing number of cloud-based applications. The cloud deployment mode is projected to grow from USD 2,724 million in 2022 to USD 16,357 million by 2027.

By component, services segment to register higher CAGR than solution segment during forecast period

Due to the growing need for businesses and governmental organizations to improve their operational efficiency in order to provide

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

citizens with better service, the entire services market is expanding significantly. The services segment allows businesses to monitor, assess, and analyze the need of citizens. By component, the services segment is projected to register a higher CAGR of 46.9% during the forecast period.

Asia Pacific market to register highest CAGR during forecast period

The citizen services AI market is projected to register the highest CAGR of 49.3% in the Asia Pacific region during the forecast period. Many government organizations have shifted their focus toward delivering improved citizen services as a result of the rapid improvements in cloud computing and IoT. Organizations are quickly implementing citizen services AI products and services with an intent to increase operational efficiency and business agility. To boost the penetration of public initiatives across various bodies, governments, particularly those in emerging economies, are making huge technology transformation efforts.

Breakdown of Primaries

In-depth interviews were conducted with Chief Executive Officers (CEOs), innovation and technology directors, system integrators, and executives from various key organizations operating in the citizen services AI market.

-By Company: Tier I: 34%, Tier II: 43%, and Tier III: 23%

-By Designation: C-Level Executives: 50%, D-Level Executives: 30%, and Managers: 20%

-By Region: Asia Pacific: 30%, Europe: 30%, North America: 25%, Middle East & Africa: 10%, Latin America: 5%

The report includes the study of key players offering citizen services AI. It profiles major vendors in the citizen services AI market. The major players in this market include IBM (US), ServiceNow (US), AWS (US), NVIDIA (US), Microsoft (US), Intel (US), Alfresco (US), Waymo (US), Voyager Labs (US), Accenture (Ireland), Alibaba (China), Tencent (China), Pegasystems (US), Baidu (China), Automation Anywhere (US), OpenText (Canada), H2O.AI (US), and ADDO (Singapore).

Research Coverage

This study covers the citizen services AI market across segments. It aims at estimating the market size and the growth potential of this market across different segments, such as component, application, organization size, deployment mode, vertical, and region. It includes an in-depth competitive analysis of the key players in the market, along with their company profiles, key observations related to product and business offerings, recent developments, and key market strategies.

Key Benefits of Buying the Report

The report would provide the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall citizen services AI market and its subsegments. It would help stakeholders understand the competitive landscape and gain more insights better to position their business and plan suitable go-to-market strategies. It also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

Table of Contents:

1 INTRODUCTION 39

1.1 STUDY OBJECTIVES 39

1.2 MARKET DEFINITION 39

1.2.1 INCLUSIONS & EXCLUSIONS 40

1.3 MARKET SCOPE 41

1.3.1 MARKET SEGMENTATION 41

1.3.2 REGIONAL SCOPE 42

1.3.3 YEARS CONSIDERED 42

1.4 CURRENCY CONSIDERED 43

TABLE 1 USD EXCHANGE RATES, 2019-2021 43

1.5 STAKEHOLDERS 43

1.6 SUMMARY OF CHANGES 43

2 RESEARCH METHODOLOGY 44

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

2.1	RESEARCH DATA	44
	FIGURE 1	CITIZEN SERVICES AI: RESEARCH DESIGN
2.1.1	SECONDARY DATA	45
2.1.2	PRIMARY DATA	45
2.1.2.1	Breakup of primary profiles	46
2.1.2.2	Key industry insights	46
2.2	DATA TRIANGULATION	47
	FIGURE 2	DATA TRIANGULATION
2.3	MARKET SIZE ESTIMATION	48
	FIGURE 3	CITIZEN SERVICES AI: TOP-DOWN AND BOTTOM-UP APPROACHES
2.3.1	TOP-DOWN APPROACH	48
2.3.2	BOTTOM-UP APPROACH	49
	FIGURE 4	MARKET SIZE ESTIMATION METHODOLOGY - APPROACH 1 (SUPPLY-SIDE): REVENUE FROM SOLUTIONS/SERVICES OF CITIZEN SERVICES AI
	FIGURE 5	MARKET SIZE ESTIMATION METHODOLOGY - APPROACH 2, BOTTOM-UP (SUPPLY-SIDE): COLLECTIVE REVENUE FROM ALL SOLUTIONS/SERVICES OF CITIZEN SERVICES AI
	FIGURE 6	MARKET SIZE ESTIMATION METHODOLOGY - APPROACH 3, BOTTOM-UP (SUPPLY-SIDE): COLLECTIVE REVENUE FROM ALL SOLUTIONS/SERVICES OF CITIZEN SERVICES AI
	FIGURE 7	MARKET SIZE ESTIMATION METHODOLOGY - APPROACH 4, BOTTOM-UP (DEMAND-SIDE): SHARE OF CITIZEN SERVICES AI THROUGH OVERALL CITIZEN SERVICES AI SPENDING
2.4	MARKET FORECAST FACTORS	52
	TABLE 2	FACTOR ANALYSIS
2.5	COMPANY EVALUATION MATRIX METHODOLOGY	53
	FIGURE 8	COMPANY EVALUATION MATRIX: CRITERIA WEIGHTAGE
2.6	STARTUP/SME EVALUATION MATRIX METHODOLOGY	54
	FIGURE 9	STARTUP/SME EVALUATION MATRIX: CRITERIA WEIGHTAGE
2.7	RESEARCH ASSUMPTIONS	54
2.8	RESEARCH LIMITATIONS	56
3	EXECUTIVE SUMMARY	57
	TABLE 3	GLOBAL CITIZEN SERVICES AI MARKET AND GROWTH RATE, 2016-2021
	TABLE 4	GLOBAL CITIZEN SERVICES AI MARKET AND GROWTH RATE, 2022-2027
	FIGURE 10	SOLUTIONS TO ACCOUNT FOR LARGER MARKET SIZE, 2022 (USD MILLION)
	FIGURE 11	PROFESSIONAL SERVICES SEGMENT TO ACCOUNT FOR LARGER MARKET SHARE, 2022
	FIGURE 12	MACHINE LEARNING TO ACCOUNT FOR LARGEST MARKET, 2022 (USD MILLION)
	FIGURE 13	CLOUD SEGMENT TO ACCOUNT FOR LARGER MARKET SIZE IN 2022
	FIGURE 14	LARGE ENTERPRISES TO ACCOUNT FOR LARGER MARKET SHARE, 2022
	FIGURE 15	GOVERNMENT & PUBLIC SECTOR SEGMENT TO ACCOUNT FOR LARGEST MARKET SIZE, 2022 (USD MILLION)
	FIGURE 16	ASIA PACIFIC TO WITNESS HIGHEST CAGR DURING FORECAST PERIOD
4	PREMIUM INSIGHTS	61
4.1	ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN CITIZEN SERVICES AI MARKET	61
	FIGURE 17	GROWING DIGITALIZATION AND SELLING PLATFORMS TO BOOST CITIZEN SERVICES AI MARKET GROWTH
4.2	CITIZEN SERVICES AI MARKET, BY VERTICAL	61
	FIGURE 18	GOVERNMENT & PUBLIC SECTOR VERTICAL TO ACCOUNT FOR LARGEST MARKET DURING FORECAST PERIOD
4.3	CITIZEN SERVICES AI MARKET, BY REGION	62
	FIGURE 19	NORTH AMERICA TO ACCOUNT FOR LARGEST MARKET SHARE, 2022
4.4	CITIZEN SERVICES AI MARKET, BY COMPONENT & DEPLOYMENT MODE	62
	FIGURE 20	SOFTWARE AND CLOUD SEGMENTS TO ACCOUNT FOR LARGER RESPECTIVE MARKET SHARES IN 2022

## 5 MARKET OVERVIEW AND INDUSTRY TRENDS 63

### 5.1 INTRODUCTION 63

### 5.2 MARKET DYNAMICS 63

#### FIGURE 21 DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES: CITIZEN SERVICES AI MARKET 63

##### 5.2.1 DRIVERS 64

###### 5.2.1.1 Need for IT modernization 64

###### 5.2.1.2 Integration of AI and analytics with citizen services 64

###### 5.2.1.3 Greater demand for automation 64

###### 5.2.1.4 Low operational and initial costs 65

##### 5.2.2 RESTRAINTS 65

###### 5.2.2.1 Lack of specialized expertise 65

###### 5.2.2.2 Less awareness among government organizations about new technologies 65

##### 5.2.3 OPPORTUNITIES 66

###### 5.2.3.1 Increase in demand for citizen services AI 66

###### 5.2.3.2 Advent of new technologies 66

###### 5.2.3.3 Organizations' willingness to use advanced technologies 66

##### 5.2.4 CHALLENGES 66

###### 5.2.4.1 Issues related to IT modernization 66

###### 5.2.4.2 Integration issues with organizations' internal processes 67

###### 5.2.4.3 Lack of expertise and infrastructure among end users 67

### 5.3 INVESTMENTS IN CITIZEN SERVICES AI MARKET 67

#### TABLE 5 MAJOR GOVERNMENT INITIATIVES/INVESTMENTS 67

### 5.4 EVOLUTION 69

#### FIGURE 22 EVOLUTION OF CITIZEN SERVICES AI 69

### 5.5 ECOSYSTEM MAPPING 70

#### TABLE 6 CITIZEN SERVICES AI MARKET: ECOSYSTEM 70

### 5.6 CASE STUDY ANALYSIS 71

#### 5.6.1 TRANSPORTATION 71

##### 5.6.1.1 Keolis incorporated Intelagent platform to offer passengers convenient information platform for journey planning 71

#### 5.6.2 HEALTHCARE 71

##### 5.6.2.1 IQVIA selected automation anywhere to boost operational effectiveness across regions 71

#### 5.6.3 GOVERNMENT & PUBLIC SECTOR 72

##### 5.6.3.1 Canadian government uses AI-powered voice of the customer from OpenText Magellan to acquire useful information 72

#### 5.6.4 ENERGY & UTILITIES 72

##### 5.6.4.1 Eni selected OpenText Intelligence Capture to foster long-term loyalty of energy customers in Italy 72

#### 5.6.5 EDUCATION & TRAINING 73

##### 5.6.5.1 University of Melbourne selected automation anywhere to reduce duplication and delays while improving customer experience 73

### 5.7 TECHNOLOGY ANALYSIS 73

#### 5.7.1 CITIZEN SERVICES AI AND BIG DATA ANALYTICS 73

#### 5.7.2 CITIZEN SERVICES AI AND MACHINE LEARNING 73

#### 5.7.3 CITIZEN SERVICES AI AND CLOUD COMPUTING 74

#### 5.7.4 CITIZEN SERVICES AI AND INTERNET OF THINGS (IOT) 74

### 5.8 SUPPLY/VALUE CHAIN ANALYSIS 74

#### FIGURE 23 SUPPLY/VALUE CHAIN ANALYSIS 74

### 5.9 PORTER'S FIVE FORCE ANALYSIS 75

#### FIGURE 24 CITIZEN SERVICES AI: PORTER'S FIVE FORCES ANALYSIS 75

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

TABLE 7	CITIZEN SERVICES AI MARKET: PORTER'S FIVE FORCES ANALYSIS	76
5.9.1	THREAT FROM NEW ENTRANTS	76
5.9.2	THREAT FROM SUBSTITUTES	76
5.9.3	BARGAINING POWER OF SUPPLIERS	76
5.9.4	BARGAINING POWER OF BUYERS	77
5.9.5	INTENSITY OF COMPETITIVE RIVALRY	77
5.10	PRICING MODEL ANALYSIS	77
5.11	PATENT ANALYSIS	78
5.11.1	METHODOLOGY	78
5.11.2	DOCUMENT TYPE	78
TABLE 8	PATENTS FILED, 2019-2021	78
5.11.3	INNOVATION & PATENT APPLICATIONS	78
FIGURE 25	ANNUAL NUMBER OF PATENTS GRANTED, 2019-2021	78
5.11.3.1	Top applicants	79
FIGURE 26	TOP 10 PATENT APPLICANTS, 2019-2021	79
TABLE 9	US: TOP 10 PATENT OWNERS IN CITIZEN SERVICES AI MARKET, 2019-2021	79
5.12	KEY CONFERENCES & EVENTS	80
TABLE 10	CITIZEN SERVICES AI MARKET: LIST OF KEY CONFERENCES & EVENTS, 2022-2023	80
5.13	TARIFF & REGULATORY LANDSCAPE	81
5.13.1	REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	81
TABLE 11	NORTH AMERICA: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	81
TABLE 12	EUROPE: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	81
TABLE 13	ASIA PACIFIC: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	82
TABLE 14	MIDDLE EAST & AFRICA: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	82
TABLE 15	LATIN AMERICA: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	83
5.13.2	NORTH AMERICA: REGULATIONS	83
5.13.2.1	Personal Information Protection and Electronic Documents Act (PIPEDA)	83
5.13.2.2	Gramm-Leach-Bliley (GLB) Act	83
5.13.2.3	Health Insurance Portability and Accountability Act (HIPAA) of 1996	83
5.13.2.4	Federal Information Security Management Act (FISMA)	84
5.13.2.5	Federal Information Processing Standards (FIPS)	84
5.13.2.6	California Consumer Privacy Act (CCPA)	84
5.13.3	EUROPE: TARIFFS & REGULATIONS	85
5.13.3.1	GDPR 2016/679 is a regulation in EU	85
5.13.3.2	General data protection regulation	85
5.13.3.3	European Committee for Standardization (CEN)	85
5.13.3.4	European Technical Standards Institute (ETSI)	85
5.14	KEY STAKEHOLDERS & BUYING CRITERIA	86
5.14.1	KEY STAKEHOLDERS IN BUYING PROCESS	86
TABLE 16	INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR TOP THREE VERTICALS	86
5.14.2	BUYING CRITERIA	86
TABLE 17	KEY BUYING CRITERIA FOR TOP THREE VERTICALS	86
6	CITIZEN SERVICES AI MARKET, BY COMPONENT	87
6.1	INTRODUCTION	88
6.1.1	COMPONENT: MARKET DRIVERS	88
FIGURE 27	SERVICES TO REGISTER HIGHER CAGR DURING FORECAST PERIOD	88
TABLE 18	CITIZEN SERVICES AI MARKET, BY COMPONENT, 2016-2021 (USD MILLION)	88

TABLE 19□CITIZEN SERVICES AI MARKET, BY COMPONENT, 2022-2027 (USD MILLION)□89

6.2□SOLUTIONS□89

6.2.1□NEED TO PROVIDE BETTER CITIZEN EXPERIENCE TO DRIVE ADOPTION AMONG GOVERNMENT AGENCIES□89

TABLE 20□CITIZEN SERVICES AI SOLUTIONS MARKET, BY REGION, 2016-2021 (USD MILLION)□89

TABLE 21□CITIZEN SERVICES AI SOLUTIONS MARKET, BY REGION, 2022-2027 (USD MILLION)□89

6.3□SERVICES□90

FIGURE 28□MANAGED SERVICES TO GROW AT HIGHER CAGR DURING FORECAST PERIOD□90

TABLE 22□CITIZEN SERVICES AI MARKET, BY SERVICE, 2016-2021 (USD MILLION)□90

TABLE 23□CITIZEN SERVICES AI MARKET, BY SERVICE, 2022-2027 (USD MILLION)□90

TABLE 24□CITIZEN SERVICES AI SERVICES MARKET, BY REGION, 2016-2021 (USD MILLION)□91

TABLE 25□CITIZEN SERVICES AI SERVICES MARKET, BY REGION, 2022-2027 (USD MILLION)□91

6.3.1□PROFESSIONAL SERVICES□91

FIGURE 29□CONSULTING TO REGISTER HIGHEST CAGR DURING FORECAST PERIOD□92

TABLE 26□CITIZEN SERVICES AI MARKET, BY PROFESSIONAL SERVICE, 2016-2021 (USD MILLION)□92

TABLE 27□CITIZEN SERVICES AI MARKET, BY PROFESSIONAL SERVICE, 2022-2027 (USD MILLION)□92

6.3.1.1□Consulting□92

6.3.1.1.1□Consulting services to enable organizations to lower risks, reduce complexities, and increase RoI□92

TABLE 28□CITIZEN SERVICES AI CONSULTING SERVICES MARKET, BY REGION, 2016-2021 (USD MILLION)□93

TABLE 29□CITIZEN SERVICES AI CONSULTING SERVICES MARKET, BY REGION, 2022-2027 (USD MILLION)□93

6.3.1.2□Support & maintenance□93

6.3.1.2.1□Support & maintenance services to help in resolution assistance and upgrading existing platforms□93

TABLE 30□CITIZEN SERVICES AI SUPPORT & MAINTENANCE SERVICES MARKET, BY REGION, 2016-2021 (USD MILLION)□94

TABLE 31□CITIZEN SERVICES AI SUPPORT & MAINTENANCE SERVICES MARKET, BY REGION, 2022-2027 (USD MILLION)□94

6.3.1.3□Deployment & integration□94

6.3.1.3.1□Analyzing client needs and operational functionalities to support wide acceptance of deployment & maintenance services□94

TABLE 32□CITIZEN SERVICES AI DEPLOYMENT & INTEGRATION SERVICES MARKET, BY REGION, 2016-2021 (USD MILLION)□95

TABLE 33□CITIZEN SERVICES AI DEPLOYMENT & INTEGRATION SERVICES MARKET, BY REGION, 2022-2027 (USD MILLION)□95

6.3.2□MANAGED SERVICES□95

6.3.2.1□More focus on core business procedures lead to high reliance on third parties for managed services□95

7□CITIZEN SERVICES AI MARKET, BY ORGANIZATION SIZE□96

7.1□INTRODUCTION□97

7.1.1□ORGANIZATION SIZE: MARKET DRIVERS□97

FIGURE 30□SMALL & MEDIUM-SIZED ENTERPRISES SEGMENT TO REGISTER HIGHER CAGR DURING FORECAST PERIOD□97

TABLE 34□CITIZEN SERVICES AI MARKET, BY ORGANIZATION SIZE, 2016-2021 (USD MILLION)□98

TABLE 35□CITIZEN SERVICES AI MARKET, BY ORGANIZATION SIZE, 2022-2027 (USD MILLION)□98

7.2□LARGE ENTERPRISES□98

7.2.1□LARGE ENTERPRISES INCLINED TO ADOPT ADVANCED TECHNOLOGIES TO MANAGE LARGE DATA VOLUMES ACROSS BUSINESS FUNCTIONS□98

TABLE 36□LARGE ENTERPRISES MARKET, BY REGION, 2016-2021 (USD MILLION)□98

TABLE 37□LARGE ENTERPRISES MARKET, BY REGION, 2022-2027 (USD MILLION)□99

7.3□SMALL & MEDIUM-SIZED ENTERPRISES□99

7.3.1□SMALL & MEDIUM-SIZED ENTERPRISES STARTED ADOPTING ADVANCED TECHNOLOGIES TO IMPROVE COMPETITIVENESS AND REDUCE OPERATING COSTS□99

TABLE 38□SMALL & MEDIUM-SIZED ENTERPRISES MARKET, BY REGION, 2016-2021 (USD MILLION)□99

TABLE 39□SMALL & MEDIUM-SIZED ENTERPRISES MARKET, BY REGION, 2022-2027 (USD MILLION)□100

8□CITIZEN SERVICE AI MARKET, BY DEPLOYMENT MODE□101

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

8.1	INTRODUCTION	102
8.1.1	DEPLOYMENT MODE: MARKET DRIVERS	102
	FIGURE 31	CLOUD DEPLOYMENT TO REGISTER HIGHER CAGR DURING FORECAST PERIOD
	TABLE 40	CITIZEN SERVICES AI MARKET, BY DEPLOYMENT MODE, 2016-2021 (USD MILLION)
	TABLE 41	CITIZEN SERVICES AI MARKET, BY DEPLOYMENT MODE, 2022-2027 (USD MILLION)
8.2	ON-PREMISES	103
8.2.1	REAL-TIME DATA AVAILABILITY FOR EXTRACTING INSIGHTS TO PROMOTE ADOPTION OF ON-PREMISE MODELS	103
	TABLE 42	ON-PREMISE CITIZEN SERVICES AI MARKET, BY REGION, 2016-2021 (USD MILLION)
	TABLE 43	ON-PREMISE CITIZEN SERVICES AI MARKET, BY REGION, 2022-2027 (USD MILLION)
8.3	CLOUD	104
8.3.1	COST-EFFECTIVENESS, EASE OF ACCESS, AND SCALABILITY TO BOOST ADOPTION OF CLOUD-BASED AI SOLUTIONS	104
	TABLE 44	CLOUD-BASED CITIZEN SERVICES AI MARKET, BY REGION, 2016-2021 (USD MILLION)
	TABLE 45	CLOUD-BASED CITIZEN SERVICES AI MARKET, BY REGION, 2022-2027 (USD MILLION)
9	CITIZEN SERVICES AI MARKET, BY TECHNOLOGY	106
9.1	INTRODUCTION	107
9.1.1	TECHNOLOGY: MARKET DRIVERS	107
	FIGURE 32	MACHINE LEARNING TECHNOLOGY TO ACCOUNT FOR LARGEST MARKET DURING FORECAST PERIOD
	TABLE 46	CITIZEN SERVICES AI MARKET, BY TECHNOLOGY, 2016-2021 (USD MILLION)
	TABLE 47	CITIZEN SERVICES AI MARKET, BY TECHNOLOGY, 2022-2027 (USD MILLION)
9.2	MACHINE LEARNING	108
9.2.1	ABILITY TO DELIVER MORE SOPHISTICATED AND ECONOMICAL CITIZEN SERVICES TO DRIVE ADOPTION OF MACHINE LEARNING	108
	TABLE 48	CITIZEN SERVICES MACHINE LEARNING MARKET, BY REGION, 2016-2021 (USD MILLION)
	TABLE 49	CITIZEN SERVICES MACHINE LEARNING MARKET, BY REGION, 2022-2027 (USD MILLION)
9.3	NATURAL LANGUAGE PROCESSING	109
9.3.1	NATURAL LANGUAGE PROCESSING TECHNOLOGY TO OFFER NECESSARY TOOLS TO EXTRACT PATTERNS AND INSIGHTS TO ENHANCE QUALITY OF CITIZEN SERVICES	109
	TABLE 50	CITIZEN SERVICES NATURAL LANGUAGE PROCESSING MARKET, BY REGION, 2016-2021 (USD MILLION)
	TABLE 51	CITIZEN SERVICES NATURAL LANGUAGE PROCESSING MARKET, BY REGION, 2022-2027 (USD MILLION)
9.4	IMAGE PROCESSING	110
9.4.1	RISE IN APPLICATIONS OF AI IMAGE PROCESSING ACROSS VARIOUS VERTICALS TO AUTOMATE VARIOUS USE CASES	110
	TABLE 52	CITIZEN SERVICES IMAGE PROCESSING MARKET, BY REGION, 2016-2021 (USD MILLION)
	TABLE 53	CITIZEN SERVICES IMAGE PROCESSING MARKET, BY REGION, 2022-2027 (USD MILLION)
9.5	FACE RECOGNITION	111
9.5.1	FACE RECOGNITION TO GAIN TRACTION DUE TO APPLICATIONS IN CRIME AND IDENTITY DETECTION	111
	TABLE 54	CITIZEN SERVICES FACE RECOGNITION MARKET, BY REGION, 2016-2021 (USD MILLION)
	TABLE 55	CITIZEN SERVICES FACE RECOGNITION MARKET, BY REGION, 2022-2027 (USD MILLION)
9.6	OTHER TECHNOLOGIES	112
	TABLE 56	OTHER CITIZEN SERVICE TECHNOLOGIES MARKET, BY REGION, 2016-2021 (USD MILLION)
	TABLE 57	OTHER CITIZEN SERVICE TECHNOLOGIES MARKET, BY REGION, 2022-2027 (USD MILLION)
10	CITIZEN SERVICES AI MARKET, BY VERTICAL	114
10.1	INTRODUCTION	115
10.1.1	VERTICAL: MARKET DRIVERS	115
10.1.2	VERTICAL: USE CASES	115
	FIGURE 33	HEALTHCARE VERTICAL TO ACCOUNT FOR HIGHEST CAGR DURING FORECAST PERIOD
	TABLE 58	CITIZEN SERVICES AI MARKET, BY VERTICAL, 2016-2021 (USD MILLION)
	TABLE 59	CITIZEN SERVICES AI MARKET, BY VERTICAL, 2022-2027 (USD MILLION)

## 10.2 TRANSPORTATION 117

### TABLE 60 TRANSPORTATION VERTICAL: USE CASES 117

#### TABLE 61 TRANSPORTATION VERTICAL MARKET, BY MODE, 2016-2021 (USD MILLION) 117

#### TABLE 62 TRANSPORTATION VERTICAL MARKET, BY MODE, 2022-2027 (USD MILLION) 117

#### TABLE 63 TRANSPORTATION VERTICAL MARKET, BY APPLICATION, 2016-2021 (USD MILLION) 118

#### TABLE 64 TRANSPORTATION VERTICAL MARKET, BY APPLICATION, 2022-2027 (USD MILLION) 118

#### TABLE 65 TRANSPORTATION VERTICAL MARKET, BY REGION, 2016-2021 (USD MILLION) 118

#### TABLE 66 TRANSPORTATION VERTICAL MARKET, BY REGION, 2022-2027 (USD MILLION) 119

## 10.3 MODE OF TRANSPORT 119

### 10.3.1 AIR 119

10.3.1.1 Potential to improve operational performance of airlines for delivering enhanced citizen services to result in adoption of AI 119

### 10.3.2 ROAD 119

10.3.2.1 Multiple enhancements to road safety with predictive power of AI to lead to enhanced road infrastructure and post-crash response 119

### 10.3.3 RAILWAYS 120

10.3.3.1 Railways incorporate AI-based solutions to compete with autonomous vehicles 120

## 10.4 TRANSPORTATIONS APPLICATION 120

### 10.4.1 SMART TICKETING 120

10.4.1.1 Smart ticketing to offer seamless travel experience to citizens 120

### 10.4.2 URBAN TRAFFIC PLANNING 120

10.4.2.1 Higher need for real-time transportation data from various means to manage traffic congestion to support adoption of AI and ML 120

### 10.4.3 ROUTE PLANNING & MAPPING 121

10.4.3.1 Emergence of advanced technologies to revolutionize route optimization by ensuring most effective path in real-time 121

### 10.4.4 HIGHWAY & ROAD SAFETY 121

10.4.4.1 Rapid adoption of AI-based solutions to increase effectiveness and efficiency of road safety systems 121

### 10.4.5 TOLL & REVENUE MANAGEMENT 121

10.4.5.1 Implementation of AI to streamline revenue operations and reduce commuter wait time 121

### 10.4.6 OTHER TRANSPORTATION APPLICATIONS 122

## 10.5 HEALTHCARE 122

### TABLE 67 HEALTHCARE VERTICAL: USE CASES 122

#### TABLE 68 HEALTHCARE VERTICAL MARKET, BY APPLICATION, 2016-2021 (USD MILLION) 123

#### TABLE 69 HEALTHCARE VERTICAL MARKET, BY APPLICATION, 2022-2027 (USD MILLION) 123

#### TABLE 70 HEALTHCARE VERTICAL MARKET, BY REGION, 2016-2021 (USD MILLION) 123

#### TABLE 71 HEALTHCARE VERTICAL MARKET, BY REGION, 2022-2027 (USD MILLION) 124

### 10.5.1 PERSONALIZED MEDICINE 124

10.5.1.1 Personalized medicine to hold potential as enhanced individualized healthcare for all citizens 124

### 10.5.2 PREDICTIVE HEALTHCARE DIAGNOSTICS 124

10.5.2.1 Adoption of advanced technologies to help achieve precision in medical diagnoses 124

### 10.5.3 PATIENT RECORD & DATA MANAGEMENT 125

10.5.3.1 Vast volume of patient health data to be easily utilized with help of AI in assessment of patient satisfaction 125

### 10.5.4 PATIENT CARE MANAGEMENT 125

10.5.4.1 Demand for personalized care planning to derive optimal results to create potential in advancing population health 125

### 10.5.5 HEALTH EMERGENCY MANAGEMENT 125

10.5.5.1 Adoption of AI to enable health agencies to control pandemic situations with better management and situational visibility 125

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com



10.5.6	OTHER HEALTHCARE APPLICATIONS	126
10.6	GOVERNMENT & PUBLIC SECTOR	126
TABLE 72	GOVERNMENT & PUBLIC SECTOR VERTICAL: USE CASES	126
TABLE 73	GOVERNMENT & PUBLIC SECTOR VERTICAL MARKET, BY APPLICATION, 2016-2021 (USD MILLION)	127
TABLE 74	GOVERNMENT & PUBLIC SECTOR VERTICAL MARKET, BY APPLICATION, 2022-2027 (USD MILLION)	127
TABLE 75	GOVERNMENT & PUBLIC SECTOR VERTICAL MARKET, BY REGION, 2016-2021 (USD MILLION)	128
TABLE 76	GOVERNMENT & PUBLIC SECTOR VERTICAL MARKET, BY REGION, 2022-2027 (USD MILLION)	128
10.6.1	CRIME INVESTIGATION	128
10.6.1.1	Rapid adoption technologies such as AI & ML to assist government agencies in criminal identification and sentencing	128
10.6.2	SECURITY & SURVEILLANCE	129
10.6.2.1	Need to provide safety and security to citizens to lead to rapid adoption of AI-based security & surveillance systems	129
10.6.3	GOVERNANCE & DIGITAL CITY SERVICES	129
10.6.3.1	Sophisticated technology to provide enhanced governance practices to citizens, involving them in decision-making	129
10.6.4	LAW ENFORCEMENT	130
10.6.4.1	Potential use of AI in law enforcement to offer authorities means to predict, foresee, and prevent crime more accurately	130
10.6.5	DISASTER MANAGEMENT & CALAMITY CONTROL	130
10.6.5.1	Governments adopt advanced technologies to provide efficient relief efforts to citizens from natural disasters	130
10.6.6	INFRASTRUCTURE PLANNING & MANAGEMENT	131
10.6.6.1	Rise in living standards and operational effectiveness required by modern cities to help governments offer better service delivery	131
10.6.7	TAX & REVENUE MANAGEMENT	131
10.6.7.1	Tax & revenue management to allow governments to detect irregular financial behavior using AI	131
10.6.8	OTHER GOVERNMENT & PUBLIC SECTOR APPLICATIONS	131
10.7	ENERGY & UTILITIES	132
TABLE 77	ENERGY & UTILITIES VERTICAL: USE CASES	132
TABLE 78	ENERGY & UTILITIES VERTICAL MARKET, BY APPLICATION, 2016-2021 (USD MILLION)	132
TABLE 79	ENERGY & UTILITIES VERTICAL MARKET, BY APPLICATION, 2022-2027 (USD MILLION)	133
TABLE 80	ENERGY & UTILITIES VERTICAL MARKET, BY REGION, 2016-2021 (USD MILLION)	133
TABLE 81	ENERGY & UTILITIES VERTICAL MARKET, BY REGION, 2022-2027 (USD MILLION)	133
10.7.1	RESOURCE MONITORING & MANAGEMENT	134
10.7.1.1	Rise in demand for advanced technologies among utility companies for proper resource management & monitoring	134
10.7.2	CUSTOMER INFORMATION & OUTAGE MANAGEMENT	134
10.7.2.1	AI and ML to support organizations with effective outage management with adequate plans	134
10.7.3	ENVIRONMENT MANAGEMENT	134
10.7.3.1	To aid in adaption and mitigation of environmental changes, governments and tech firms show high interest in ML	134
10.7.4	WASTE MANAGEMENT	135
10.7.4.1	Adoption of sophisticated sensors to identify various kinds of trash to enable efficient smart waste management	135
10.7.5	BILLING & PAYMENT MANAGEMENT	135
10.7.5.1	Digital payment options to offer comfort, convenience, increased accountability, transparency, and traceability	135
10.7.6	OTHER ENERGY & UTILITY APPLICATIONS	136
10.8	AGRICULTURE	136
TABLE 82	AGRICULTURE VERTICAL: USE CASES	136
TABLE 83	AGRICULTURE VERTICAL MARKET, BY APPLICATION, 2016-2021 (USD MILLION)	137
TABLE 84	AGRICULTURE VERTICAL MARKET, BY APPLICATION, 2022-2027 (USD MILLION)	137
TABLE 85	AGRICULTURE VERTICAL MARKET, BY REGION, 2016-2021 (USD MILLION)	137
TABLE 86	AGRICULTURE VERTICAL MARKET, BY REGION, 2022-2027 (USD MILLION)	138

10.8.1	SOIL TESTING	138
10.8.1.1	Adopting advanced technologies to help farmers access parameters of soil health of agricultural fields	138
10.8.2	CROP DISEASES DETECTION & PROTECTION	138
10.8.2.1	Smart farming systems with advanced technologies to help farmers identify diseases and protect crops	138
10.8.3	CROP MONITORING	139
10.8.3.1	Smart crop monitoring to offer wide range of applications in agriculture	139
10.8.4	SMART IRRIGATION	139
10.8.4.1	Augmented advanced technologies to enhance irrigation systems and maximize water usage effectiveness	139
10.8.5	LIVESTOCK MANAGEMENT	139
10.8.5.1	AI in livestock management to increase output rate of high-quality feeding animals	139
10.8.6	AGRICULTURE FINANCE	140
10.8.6.1	Adoption of AI by agri-finance farmers to avoid financial turmoil and improve financial management	140
10.9	EDUCATION & TRAINING	140
TABLE 87	EDUCATION & TRAINING VERTICAL: USE CASES	140
TABLE 88	EDUCATION & TRAINING VERTICAL MARKET, BY APPLICATION, 2016-2021 (USD MILLION)	141
TABLE 89	EDUCATION & TRAINING VERTICAL MARKET, BY APPLICATION, 2022-2027 (USD MILLION)	141
TABLE 90	EDUCATION & TRAINING VERTICAL MARKET, BY REGION, 2016-2021 (USD MILLION)	141
TABLE 91	EDUCATION & TRAINING VERTICAL MARKET, BY REGION, 2022-2027 (USD MILLION)	142
10.9.1	CURRICULUM MANAGEMENT & DELIVERY	142
10.9.1.1	Technologies to assist citizens in eliminating silos and offer enhanced intelligence of government systems	142
10.9.2	ADAPTIVE LEARNING & ASSESSMENT	142
10.9.2.1	Adaptive learning to offer real-time tracking of every encounter and monitoring student development	142
10.9.3	TRAINING & COACHING	143
10.9.3.1	Training & coaching to help individuals develop knowledge and skills at their own pace	143
10.9.4	PERSONALIZED EDUCATION	143
10.9.4.1	Personalized education to enable individuals to meet their needs and learning goals at their convenience	143
10.9.5	SCHOLARSHIP MANAGEMENT	143
10.9.5.1	Scholarships to offer financial assistance and encourage individuals to pursue careers by enrolling in higher studies	143
11	CITIZEN SERVICES AI MARKET, BY REGION	144
11.1	INTRODUCTION	145
FIGURE 34	CHINA TO REGISTER HIGHEST COUNTRY-LEVEL CAGR DURING FORECAST PERIOD	145
FIGURE 35	ASIA PACIFIC TO RECORD HIGHEST CAGR AMONG REGIONS DURING FORECAST PERIOD	146
TABLE 92	CITIZEN SERVICES AI MARKET, BY REGION, 2016-2021 (USD MILLION)	146
TABLE 93	CITIZEN SERVICES AI MARKET, BY REGION, 2022-2027 (USD MILLION)	146
11.2	NORTH AMERICA	147
11.2.1	NORTH AMERICA: MARKET DRIVERS	147
FIGURE 36	NORTH AMERICA: MARKET SNAPSHOT	148
TABLE 94	NORTH AMERICA: CITIZEN SERVICES AI MARKET, BY COMPONENT, 2016-2021 (USD MILLION)	148
TABLE 95	NORTH AMERICA: CITIZEN SERVICES AI MARKET, BY COMPONENT, 2022-2027 (USD MILLION)	149
TABLE 96	NORTH AMERICA: CITIZEN SERVICES AI MARKET, BY SERVICE, 2016-2021 (USD MILLION)	149
TABLE 97	NORTH AMERICA: CITIZEN SERVICES AI MARKET, BY SERVICE, 2022-2027 (USD MILLION)	149
TABLE 98	NORTH AMERICA: CITIZEN SERVICES AI MARKET, BY PROFESSIONAL SERVICE, 2016-2021 (USD MILLION)	149
TABLE 99	NORTH AMERICA: CITIZEN SERVICES AI MARKET, BY PROFESSIONAL SERVICE, 2022-2027 (USD MILLION)	150
TABLE 100	NORTH AMERICA: CITIZEN SERVICES AI MARKET, BY DEPLOYMENT MODE, 2016-2021 (USD MILLION)	150
TABLE 101	NORTH AMERICA: CITIZEN SERVICES AI MARKET, BY DEPLOYMENT MODE, 2022-2027 (USD MILLION)	150
TABLE 102	NORTH AMERICA: CITIZEN SERVICES AI MARKET, BY ORGANIZATION SIZE, 2016-2021 (USD MILLION)	150
TABLE 103	NORTH AMERICA: CITIZEN SERVICES AI MARKET, BY ORGANIZATION SIZE, 2022-2027 (USD MILLION)	151

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

TABLE 104	NORTH AMERICA: CITIZEN SERVICES AI MARKET, BY TECHNOLOGY, 2016-2021 (USD MILLION)	151
TABLE 105	NORTH AMERICA: CITIZEN SERVICES AI MARKET, BY TYPE, 2022-2027 (USD MILLION)	151
TABLE 106	NORTH AMERICA: CITIZEN SERVICES AI MARKET, BY VERTICAL, 2016-2021 (USD MILLION)	152
TABLE 107	NORTH AMERICA: CITIZEN SERVICES AI MARKET, BY VERTICAL, 2022-2027 (USD MILLION)	152
TABLE 108	NORTH AMERICA: CITIZEN SERVICES AI MARKET, BY COUNTRY, 2016-2021 (USD MILLION)	152
TABLE 109	NORTH AMERICA: CITIZEN SERVICES AI MARKET, BY COUNTRY, 2022-2027 (USD MILLION)	153
11.2.2	US	153
11.2.2.1	Presence of several global players to increase demand for AI solutions for enhanced support for government organizations	153
TABLE 110	US: CITIZEN SERVICES AI MARKET, BY TECHNOLOGY, 2016-2021 (USD MILLION)	153
TABLE 111	US: CITIZEN SERVICES AI MARKET, BY TECHNOLOGY, 2022-2027 (USD MILLION)	154
TABLE 112	US: CITIZEN SERVICES AI MARKET, BY DEPLOYMENT MODE, 2016-2021 (USD MILLION)	154
TABLE 113	US: CITIZEN SERVICES AI MARKET, BY DEPLOYMENT MODE, 2022-2027 (USD MILLION)	154
11.2.3	CANADA	154
11.2.3.1	Adopting AI technologies in public sector to help government in making efficient administrative decisions	154
11.3	EUROPE	155
11.3.1	EUROPE: MARKET DRIVERS	155
TABLE 114	EUROPE: CITIZEN SERVICES AI MARKET, BY COMPONENT, 2016-2021 (USD MILLION)	155
TABLE 115	EUROPE: CITIZEN SERVICES AI MARKET, BY COMPONENT, 2022-2027 (USD MILLION)	156
TABLE 116	EUROPE: CITIZEN SERVICES AI MARKET, BY SERVICE, 2016-2021 (USD MILLION)	156
TABLE 117	EUROPE: CITIZEN SERVICES AI MARKET, BY SERVICE, 2022-2027 (USD MILLION)	156
TABLE 118	EUROPE: CITIZEN SERVICES AI MARKET, BY PROFESSIONAL SERVICE, 2016-2021 (USD MILLION)	156
TABLE 119	EUROPE: CITIZEN SERVICES AI MARKET, BY PROFESSIONAL SERVICE, 2022-2027 (USD MILLION)	157
TABLE 120	EUROPE: CITIZEN SERVICES AI MARKET, BY DEPLOYMENT MODE, 2016-2021 (USD MILLION)	157
TABLE 121	EUROPE: CITIZEN SERVICES AI MARKET, BY DEPLOYMENT MODE, 2022-2027 (USD MILLION)	157
TABLE 122	EUROPE: CITIZEN SERVICES AI MARKET, BY ORGANIZATION SIZE, 2016-2021 (USD MILLION)	157
TABLE 123	EUROPE: CITIZEN SERVICES AI MARKET, BY ORGANIZATION SIZE, 2022-2027 (USD MILLION)	158
TABLE 124	EUROPE: CITIZEN SERVICES AI MARKET, BY TECHNOLOGY, 2016-2021 (USD MILLION)	158
TABLE 125	EUROPE: CITIZEN SERVICES AI MARKET, BY TECHNOLOGY, 2022-2027 (USD MILLION)	158
TABLE 126	EUROPE: CITIZEN SERVICES AI MARKET, BY VERTICAL, 2016-2021 (USD MILLION)	159
TABLE 127	EUROPE: CITIZEN SERVICES AI MARKET, BY VERTICAL, 2022-2027 (USD MILLION)	159
TABLE 128	EUROPE: CITIZEN SERVICES AI MARKET, BY COUNTRY, 2016-2021 (USD MILLION)	159
TABLE 129	EUROPE: CITIZEN SERVICES AI MARKET, BY COUNTRY, 2022-2027 (USD MILLION)	160
11.3.2	UK	160
11.3.2.1	Focus on R&D of advanced technologies and higher investments by government organizations to drive market	160
TABLE 130	UK: CITIZEN SERVICES AI MARKET, BY TECHNOLOGY, 2016-2021 (USD MILLION)	160
TABLE 131	UK: CITIZEN SERVICES AI MARKET, BY TECHNOLOGY, 2022-2027 (USD MILLION)	161
TABLE 132	UK: CITIZEN SERVICES AI MARKET, BY DEPLOYMENT MODE, 2016-2021 (USD MILLION)	161
TABLE 133	UK: CITIZEN SERVICES AI MARKET, BY DEPLOYMENT MODE, 2022-2027 (USD MILLION)	161
11.3.3	GERMANY	161
11.3.3.1	Rapid adoption of modern technologies across various verticals to fuel market expansion	161
11.3.4	FRANCE	162
11.3.4.1	Increase in investments in AI startups to expedite development of AI ecosystem in France	162
11.3.5	REST OF EUROPE	162
11.4	ASIA PACIFIC	163
11.4.1	ASIA PACIFIC: MARKET DRIVERS	163
FIGURE 37	ASIA PACIFIC: MARKET SNAPSHOT	164

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

TABLE 134	ASIA PACIFIC: CITIZEN SERVICES AI MARKET, BY COMPONENT, 2016-2021 (USD MILLION)	164
TABLE 135	ASIA PACIFIC: CITIZEN SERVICES AI MARKET, BY COMPONENT, 2022-2027 (USD MILLION)	165
TABLE 136	ASIA PACIFIC: CITIZEN SERVICES AI MARKET, BY SERVICE, 2016-2021 (USD MILLION)	165
TABLE 137	ASIA PACIFIC: CITIZEN SERVICES AI MARKET, BY SERVICE, 2022-2027 (USD MILLION)	165
TABLE 138	ASIA PACIFIC: CITIZEN SERVICES AI MARKET, BY PROFESSIONAL SERVICE, 2016-2021 (USD MILLION)	165
TABLE 139	ASIA PACIFIC: CITIZEN SERVICES AI MARKET, BY PROFESSIONAL SERVICE, 2022-2027 (USD MILLION)	166
TABLE 140	ASIA PACIFIC: CITIZEN SERVICES AI MARKET, BY DEPLOYMENT MODE, 2016-2021 (USD MILLION)	166
TABLE 141	ASIA PACIFIC: CITIZEN SERVICES AI MARKET, BY DEPLOYMENT MODE, 2022-2027 (USD MILLION)	166
TABLE 142	ASIA PACIFIC: CITIZEN SERVICES AI MARKET, BY ORGANIZATION SIZE, 2016-2021 (USD MILLION)	166
TABLE 143	ASIA PACIFIC: CITIZEN SERVICES AI MARKET, BY ORGANIZATION SIZE, 2022-2027 (USD MILLION)	167
TABLE 144	ASIA PACIFIC: CITIZEN SERVICES AI MARKET, BY TECHNOLOGY, 2016-2021 (USD MILLION)	167
TABLE 145	ASIA PACIFIC: CITIZEN SERVICES AI MARKET, BY TECHNOLOGY, 2022-2027 (USD MILLION)	167
TABLE 146	ASIA PACIFIC: CITIZEN SERVICES AI MARKET, BY VERTICAL, 2016-2021 (USD MILLION)	168
TABLE 147	ASIA PACIFIC: CITIZEN SERVICES AI MARKET, BY VERTICAL, 2022-2027 (USD MILLION)	168
TABLE 148	ASIA PACIFIC: CITIZEN SERVICES AI MARKET, BY COUNTRY, 2016-2021 (USD MILLION)	168
TABLE 149	ASIA PACIFIC: CITIZEN SERVICES AI MARKET, BY COUNTRY, 2022-2027 (USD MILLION)	169
11.4.2	CHINA	169
11.4.2.1	Rapid adoption of advanced technologies for smarter services across various verticals to retain help China as market leader	169
TABLE 150	CHINA: CITIZEN SERVICES AI MARKET, BY TECHNOLOGY, 2016-2021 (USD MILLION)	170
TABLE 151	CHINA: CITIZEN SERVICES AI MARKET, BY TECHNOLOGY, 2022-2027 (USD MILLION)	170
TABLE 152	CHINA: CITIZEN SERVICES AI MARKET, BY DEPLOYMENT MODE, 2016-2021 (USD MILLION)	170
TABLE 153	CHINA: CITIZEN SERVICES AI MARKET, BY DEPLOYMENT MODE, 2022-2027 (USD MILLION)	170
11.4.3	JAPAN	171
11.4.3.1	Growth in innovative technologies and initiatives to help Japan remain an AI giant in Asia Pacific	171
11.4.4	INDIA	171
11.4.4.1	Several government initiatives and investments to offer better citizen experience to drive market	171
11.4.5	SINGAPORE	172
11.4.5.1	Investments in citizen services to harness technology for societal and economic advancement to drive adoption of AI solutions	172
11.4.6	REST OF ASIA PACIFIC	173
11.5	MIDDLE EAST & AFRICA	173
11.5.1	MIDDLE EAST & AFRICA: MARKET DRIVERS	173
TABLE 154	MIDDLE EAST & AFRICA: CITIZEN SERVICES AI MARKET, BY COMPONENT, 2016-2021 (USD MILLION)	173
TABLE 155	MIDDLE EAST & AFRICA: CITIZEN SERVICES AI MARKET, BY COMPONENT, 2022-2027 (USD MILLION)	174
TABLE 156	MIDDLE EAST & AFRICA: CITIZEN SERVICES AI MARKET, BY SERVICE, 2016-2021 (USD MILLION)	174
TABLE 157	MIDDLE EAST & AFRICA: CITIZEN SERVICES AI MARKET, BY SERVICE, 2022-2027 (USD MILLION)	174
TABLE 158	MIDDLE EAST & AFRICA: CITIZEN SERVICES AI MARKET, BY PROFESSIONAL SERVICE, 2016-2021 (USD MILLION)	174
TABLE 159	MIDDLE EAST & AFRICA: CITIZEN SERVICES AI MARKET, BY PROFESSIONAL SERVICE, 2022-2027 (USD MILLION)	175
TABLE 160	MIDDLE EAST & AFRICA: CITIZEN SERVICES AI MARKET, BY DEPLOYMENT MODE, 2016-2021 (USD MILLION)	175
TABLE 161	MIDDLE EAST & AFRICA: CITIZEN SERVICES AI MARKET, BY DEPLOYMENT MODE, 2022-2027 (USD MILLION)	175
TABLE 162	MIDDLE EAST & AFRICA: CITIZEN SERVICES AI MARKET, BY ORGANIZATION SIZE, 2016-2021 (USD MILLION)	175
TABLE 163	MIDDLE EAST & AFRICA: CITIZEN SERVICES AI MARKET, BY ORGANIZATION SIZE, 2022-2027 (USD MILLION)	176
TABLE 164	MIDDLE EAST & AFRICA: CITIZEN SERVICES AI MARKET, BY TECHNOLOGY, 2016-2021 (USD MILLION)	176
TABLE 165	MIDDLE EAST & AFRICA: CITIZEN SERVICES AI MARKET, BY TECHNOLOGY, 2022-2027 (USD MILLION)	176
TABLE 166	MIDDLE EAST & AFRICA: CITIZEN SERVICES AI MARKET, BY VERTICAL, 2016-2021 (USD MILLION)	177
TABLE 167	MIDDLE EAST & AFRICA: CITIZEN SERVICES AI MARKET, BY VERTICAL, 2022-2027 (USD MILLION)	177

TABLE 168 MIDDLE EAST & AFRICA: CITIZEN SERVICES AI MARKET, BY COUNTRY, 2016-2021 (USD MILLION) 177

TABLE 169 MIDDLE EAST & AFRICA: CITIZEN SERVICES AI MARKET, BY COUNTRY, 2022-2027 (USD MILLION) 178

11.5.2 KINGDOM OF SAUDI ARABIA 178

11.5.2.1 Economic growth and awareness of advanced technologies to lead to rapid adoption of AI solutions and services 178

11.5.3 UNITED ARAB EMIRATES 178

11.5.3.1 Increase in investment in multiple existing firms and startups to provide opportunities to transform citizen experiences 178

11.5.4 REST OF THE MIDDLE EAST & AFRICA 179

**Citizen Services AI Market by Technology (ML, NLP, Image Processing and Face Recognition), Vertical (Transportation, Healthcare, Government & Public Sector, Energy & Utilities, Agriculture, and Education & Training) and Region - Global Forecast to 2027**

Market Report | 2022-11-07 | 259 pages | MarketsandMarkets

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

**ORDER FORM:**

Select license	License	Price
	Single User	\$4950.00
	Multi User	\$6650.00
	Corporate License	\$8150.00
	Enterprise Site License	\$10000.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	2025-05-20
		Signature	<div></div>