

**Digital Transformation Market by Offering (Solutions & Services), Technology (Cloud Computing, Big Data & Analytics, Blockchain, Cybersecurity, AI), Business Function (Accounting & Finance, IT, HR), Vertical,& Region - Global Forecast to 2030**

Market Report | 2023-07-21 | 353 pages | MarketsandMarkets

**AVAILABLE LICENSES:**

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

**Report description:**

The digital transformation market size is to grow from USD 695.5 billion in 2023 to USD 3,144.9 billion by 2030, at a Compound Annual Growth Rate (CAGR) of 24.1% during the forecast period.

Digital transformation is the rapid advancement of technology. With the continuous development of technologies such as artificial intelligence, machine learning, cloud computing, and the Internet of Things, organizations are increasingly leveraging these tools to optimize their operations, enhance customer experiences, and drive innovation. The ability to collect, analyze, and leverage vast amounts of data in real time has become a critical asset for businesses, enabling them to make data-driven decisions, personalize offerings, and improve overall efficiency. Moreover, the widespread adoption of digital channels and the growing tech-savvy nature of customers have created a demand for seamless and integrated digital experiences across all touchpoints. The AI technology has the highest CAGR during the forecast period.

By technology, the digital transformation market has been segmented into cloud computing, big data & analytics, blockchain, cybersecurity, AI, and IoT. The CAGR of AI technology is estimated to be the highest during the forecast period. Digital transformation with AI technology is the increasing demand for enhanced customer experiences and personalized services. AI-powered solutions enable businesses to analyze vast amounts of data in real time, allowing them to gain valuable insights into customer preferences and behavior. This empowers organizations to deliver tailored and proactive services, resulting in improved customer satisfaction and loyalty.

By offering, the Services segment has the highest CAGR during the forecast period.

By offering, the digital transformation market has been segmented into solutions and services. The CAGR of services is estimated to be the largest during the forecast period. Digital transformation services are experiencing a surge in popularity driven by several key factors. The growing demand for enhanced customer experiences and engagement has pushed organizations to adopt

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

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

www.scotts-international.com

innovative technologies and strategies that enable personalized interactions and seamless omnichannel experiences.

By vertical, the BFSI segment has the largest market size during the forecast period.

The increasing customer demand for seamless and personalized digital experiences has led financial institutions to invest in technologies such as AI, machine learning, and data analytics to enhance customer engagement, streamline processes, and offer personalized financial solutions. The regulatory requirements and the need for enhanced security measures have pushed the BFSI sector to adopt advanced technologies like blockchain and biometrics to ensure secure transactions and protect sensitive data. Additionally, the rise of fintech startups and their disruptive business models have compelled traditional institutions to transform digitally in order to stay competitive, innovate their offerings, and collaborate with fintech players to leverage their technological expertise.

Among regions, Asia Pacific registered the highest CAGR during the forecast period.

By region, the Asia Pacific region has witnessed rapid advancements in technology, such as the proliferation of mobile devices, widespread internet connectivity, and the adoption of cloud computing. These advancements have created a strong foundation for digital transformation initiatives. Governments in the Asia Pacific region are actively promoting digital transformation to drive economic growth and enhance competitiveness. They are implementing policies, providing incentives, and investing in digital infrastructure to facilitate this transformation.

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 digital transformation market.

-□By Company: Tier I: 35%, Tier II: 45%, and Tier III: 20%

-□By Designation: C-Level Executives: 35%, D-Level Executives: 25%, and Managers: 40%

-□By Region: North America: 30%, Europe: 30%, APAC: 25%, MEA: 10%, Latin America: 5%

The report includes the study of key players offering digital transformation solutions and services. It profiles major vendors in the global digital transformation market. The major vendors in the global digital transformation market include Microsoft (US), SAP (Germany), Baidu (China), Adobe Systems (US), Alibaba (China), IBM (US), Google (US), Marlabs (US), Salesforce (US), Broadcom (US), Equinix (US), Oracle (US), Hewlett Packard Enterprise (US), HCL Technologies (India), EY (UK), Cognizant (US), Accenture (Ireland), Tibco Software (US), Alcor Solutions (US), Smartstream (US), Yash Technologies (US), Interfacing (US), Kissflow (India), eMudhra (India), ProcessMaker (US), Process Street (US), Happiest Minds (India), Scoro (UK), Dempton Consulting Group (Canada), Brillio (US), Aexonic Technologies (India), CloudAngles (US), Magnetar IT (England), Scitara (US), Intrinsic (US), and Soundful (US).

Research Coverage

The market study covers the digital transformation market across segments. It aims at estimating the market size and the growth potential of this market across different segments, such as components, technology, deployment mode, organization size, business function, 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 market for digital transformation 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. □

The report provides insights on the following pointers:

-□Analysis of key drivers (Rising adoption of big data and other related technologies, Advent of ML and digital transformation, Cost benefits of cloud-based digital transformation solutions, and Adoption and scaling of digital initiatives), restraints (Changing regional data regulations to lead to a time-consuming restructuring of predictive models, Data privacy and security concerns, Issues about privacy and security of information), opportunities (Rising internet proliferation and growing usage of connected and integrated technologies, Demand for personalized digital transformation, Increasing willingness of organizations to use digital

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

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

www.scotts-international.com

technology ), and challenges (Integration of data from data silos, Issues related to IT modernization, Ownership and privacy of collected data) influencing the growth of the digital transformation market.

-□Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the digital transformation market.

-□Market Development: Comprehensive information about lucrative markets - the report analyses the digital transformation market across varied regions

-□Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in digital transformation market strategies; the report also helps stakeholders understand the pulse of the digital transformation market and provides them with information on key market drivers, restraints, challenges, and opportunities

-□Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players such as Microsoft (US), SAP (Germany), Baidu (China), Adobe Systems (US), Alibaba (China), IBM (US), Google (US), and Marlabs (US) among others in the digital transformation market.

## **Table of Contents:**

1	INTRODUCTION	45
1.1	STUDY OBJECTIVES	45
1.2	MARKET DEFINITION	45
1.2.1	INCLUSIONS AND EXCLUSIONS	46
1.3	MARKET SCOPE	46
1.3.1	MARKET SEGMENTATION	47
1.3.2	REGIONS COVERED	47
1.3.3	YEARS CONSIDERED	48
1.4	CURRENCY CONSIDERED	48
TABLE 1	USD EXCHANGE RATES, 2020-2022	48
1.5	STAKEHOLDERS	48
1.6	SUMMARY OF CHANGES	49
2	RESEARCH METHODOLOGY	50
2.1	RESEARCH DATA	50
FIGURE 1	DIGITAL TRANSFORMATION MARKET: RESEARCH DESIGN	50
2.1.1	SECONDARY DATA	51
2.1.2	PRIMARY DATA	51
TABLE 2	LIST OF PRIMARY INTERVIEWS	51
2.1.2.1	Breakup of primary sources	52
2.1.2.2	Key industry insights	52
2.2	DATA TRIANGULATION	53
FIGURE 2	DATA TRIANGULATION	53
2.3	MARKET SIZE ESTIMATION	54
FIGURE 3	DIGITAL TRANSFORMATION MARKET: TOP-DOWN AND BOTTOM-UP APPROACHES	54
2.3.1	TOP-DOWN APPROACH	54
2.3.2	BOTTOM-UP APPROACH	55
FIGURE 4	MARKET SIZE ESTIMATION METHODOLOGY-APPROACH 1 (SUPPLY SIDE): REVENUE OF SOLUTIONS/SERVICES OF DIGITAL TRANSFORMATION MARKET	55
FIGURE 5	MARKET SIZE ESTIMATION METHODOLOGY-APPROACH 2 - BOTTOM-UP (SUPPLY SIDE): COLLECTIVE REVENUE OF	

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

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

www.scotts-international.com

SOLUTIONS/SERVICES OF DIGITAL TRANSFORMATION MARKET	56
FIGURE 6 MARKET SIZE ESTIMATION METHODOLOGY-APPROACH 3, BOTTOM-UP (SUPPLY SIDE): COLLECTIVE REVENUE FROM SOFTWARE/SERVICES OF DIGITAL TRANSFORMATION MARKET	57
FIGURE 7 MARKET SIZE ESTIMATION METHODOLOGY-APPROACH 4, BOTTOM-UP (DEMAND SIDE): SHARE OF DIGITAL TRANSFORMATION THROUGH OVERALL DIGITAL TRANSFORMATION SPENDING	57
2.4 MARKET FORECAST	58
TABLE 3 FACTOR ANALYSIS	58
2.5 ASSUMPTIONS	59
2.6 LIMITATIONS	60
2.7 IMPLICATIONS OF RECESSION ON DIGITAL TRANSFORMATION MARKET	61
3 EXECUTIVE SUMMARY	62
TABLE 4 DIGITAL TRANSFORMATION MARKET AND GROWTH RATE, 2018-2022 (USD MILLION, Y-O-Y %)	63
TABLE 5 DIGITAL TRANSFORMATION MARKET AND GROWTH RATE, 2023-2030 (USD MILLION, Y-O-Y %)	63
FIGURE 8 SOLUTIONS SEGMENT TO ACCOUNT FOR LARGER MARKET SHARE IN 2023	63
FIGURE 9 CONSULTING SEGMENT TO ACCOUNT FOR LARGEST MARKET SHARE IN 2023	64
FIGURE 10 CLOUD COMPUTING SEGMENT TO DOMINATE MARKET IN 2023	64
FIGURE 11 CLOUD SEGMENT TO ACCOUNT FOR LARGER MARKET SHARE IN 2023	64
FIGURE 12 BFSI SEGMENT TO ACCOUNT FOR LARGEST MARKET SHARE IN 2023	64
FIGURE 13 MARKETING & SALES SEGMENT TO ACCOUNT FOR LARGEST MARKET SHARE IN 2023	65
FIGURE 14 NORTH AMERICA TO ACCOUNT FOR LARGEST MARKET SHARE IN 2023	66
4 PREMIUM INSIGHTS	67
4.1 ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN DIGITAL TRANSFORMATION MARKET	67
FIGURE 15 DEMAND FOR PERSONALIZED DIGITAL TRANSFORMATION TO DRIVE MARKET GROWTH DURING FORECAST PERIOD	67
4.2 OVERVIEW OF RECESSION IN GLOBAL DIGITAL TRANSFORMATION MARKET	67
FIGURE 16 DIGITAL TRANSFORMATION MARKET TO WITNESS MINOR DECLINE IN Y-O-Y GROWTH IN 2023	67
4.3 DIGITAL TRANSFORMATION MARKET: BY REGION	68
FIGURE 17 NORTH AMERICA TO ACCOUNT FOR LARGEST MARKET SHARE IN 2023	68
4.4 DIGITAL TRANSFORMATION MARKET: TOP THREE VERTICALS	68
FIGURE 18 BFSI TO ACCOUNT FOR LARGEST MARKET SHARE DURING FORECAST PERIOD	68
4.5 DIGITAL TRANSFORMATION MARKET, BY TECHNOLOGY AND VERTICAL	69
FIGURE 19 CLOUD COMPUTING AND BFSI SEGMENTS TO ACCOUNT FOR LARGEST SHARES IN 2023	69
5 MARKET OVERVIEW AND INDUSTRY TRENDS	70
5.1 INTRODUCTION	70
5.2 MARKET DYNAMICS	70
FIGURE 20 DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES: DIGITAL TRANSFORMATION MARKET	70
5.2.1 DRIVERS	71
5.2.1.1 Rising adoption of big data and other related technologies	71
5.2.1.2 Advent of ML and digital transformation	71
5.2.1.3 Cost benefits of cloud-based digital transformation solutions	72
5.2.1.4 Rapid proliferation of mobile devices and apps	72
5.2.1.5 Adoption and scaling of digital initiatives	72
5.2.2 RESTRAINTS	73
5.2.2.1 Changing regional data regulations to lead to time-consuming restructuring of predictive models	73
5.2.2.2 Data security concerns	73
5.2.2.3 Issues about privacy and security of information	74
5.2.3 OPPORTUNITIES	74
5.2.3.1 Rising internet proliferation and growing usage of connected and integrated technologies	74

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

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

www.scotts-international.com

5.2.3.2	Demand for personalized digital transformation	74
5.2.3.3	Increasing willingness of organizations to use digital technology	75
5.2.4	CHALLENGES	75
5.2.4.1	Integration of data from data silos	75
5.2.4.2	Issues related to IT modernization	75
5.2.4.3	Ownership and privacy of collected data	76
5.3	DIGITAL TRANSFORMATION: EVOLUTION	76
FIGURE 21	EVOLUTION OF DIGITAL TRANSFORMATION	76
5.4	ECOSYSTEM	77
FIGURE 22	DIGITAL TRANSFORMATION MARKET: ECOSYSTEM	77
TABLE 6	DIGITAL TRANSFORMATION MARKET: ECOSYSTEM	77
5.5	CASE STUDY ANALYSIS	79
5.5.1	BFSI	79
5.5.1.1	Case study 1: Cognizant's AI and automation solution helped insurance company improve insurance claims process	79
5.5.1.2	Case study 2: Microsoft Azure platform enabled Milliman Consulting to improve its business models	79
5.5.1.3	Case study 3: BSE made real-time decisions and reduced operational costs with Cloudera solutions	80
5.5.2	TELECOMMUNICATION	80
5.5.2.1	Case study 1: American telecommunication service provider (TSP) collaborated with HCL to refine its digital journey	80
5.5.2.2	Case study 2: A1 Srbija accelerated 5G, revolutionizing digital services with HPE solutions	81
5.5.3	RETAIL & ECOMMERCE	81
5.5.3.1	Case study 1: ASOS used Microsoft Azure ML service to reduce time-to-market for recommendation model	81
5.5.3.2	Case study 2: Walmart optimized shopping experience by applying data mining	82
5.5.3.3	Case study 3: DOCOMO Digital categorized user behavior and improved campaign targeting by deploying Cloudera solutions	82
5.5.4	ENERGY & UTILITIES	82
5.5.4.1	Case study 1: Searcher Seismic made easy access in oil & gas industry with Cloudera solutions	82
5.5.4.2	Case study 2: TechnipFMC created data centralization by deploying Cloudera solutions	83
5.5.5	HEALTHCARE & LIFE SCIENCES	83
5.5.5.1	Case study 1: Leading healthcare company adopted Cognizant's AI-driven solution to identify drug-seeking behavior	83
5.5.5.2	Case study 2: Inspire used ML to connect millions of patients and caregivers on AWS	84
5.5.6	MANUFACTURING	84
5.5.6.1	Case Study 1: IBM helped SHENZHEN CSOT boost production quality and output	84
5.5.6.2	Case study 2: Dell built 360-degree customer view with Cloudera	85
5.5.7	MEDIA & ENTERTAINMENT	85
5.5.7.1	Case study 1: Leading media conglomerate adopted HCL's digital transformation solution to redefine user experience through human-centric design	85
5.5.7.2	Case study 2: Gaia boosted subscriber engagement and data-driven decision-making	86
5.5.8	GOVERNMENT & DEFENSE	86
5.5.8.1	Case study 1: OANDA provided real-time access to foreign exchange trading market by moving to Equinix's TY3 facility	86
5.5.8.2	Case study 2: Dubai government monetized and harnessed real-time data for community benefit with Cloudera	87
5.6	TECHNOLOGY ANALYSIS	87
5.6.1	KEY TECHNOLOGIES	87
5.6.1.1	Cloud computing	87
5.6.1.2	Artificial intelligence and machine learning	88
5.6.1.3	Internet of things	88
5.6.1.4	Big data analytics	89
5.6.1.5	Blockchain	89

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

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

www.scotts-international.com

5.6.2	ADJACENT TECHNOLOGIES	89
5.6.2.1	Edge computing	89
5.6.2.2	5G networks	90
5.6.2.3	API management	90
5.6.2.4	DevOps	90
5.6.2.5	Digital twin	91
5.6.2.6	AR/VR	91
5.7	MARKET ANALYSIS, BY APPLICATION	92
5.7.1	CUSTOMER TRANSFORMATION	92
5.7.2	WORKFORCE TRANSFORMATION	92
5.7.3	OPERATIONAL TRANSFORMATION	92
5.7.4	PRODUCT TRANSFORMATION	93
5.8	SUPPLY/VALUE CHAIN ANALYSIS	93
FIGURE 23	SUPPLY/VALUE CHAIN ANALYSIS	93
5.9	PORTER'S FIVE FORCES ANALYSIS	94
FIGURE 24	DIGITAL TRANSFORMATION MARKET: PORTER'S FIVE FORCES ANALYSIS	94
TABLE 7	DIGITAL TRANSFORMATION MARKET: PORTER'S FIVE FORCES ANALYSIS	95
5.9.1	THREAT OF NEW ENTRANTS	95
5.9.2	THREAT OF SUBSTITUTES	95
5.9.3	BARGAINING POWER OF SUPPLIERS	95
5.9.4	BARGAINING POWER OF BUYERS	96
5.9.5	INTENSITY OF COMPETITIVE RIVALRY	96
5.10	PRICING MODEL ANALYSIS	96
5.10.1	INDICATIVE PRICING OF KEY OFFERINGS	97
TABLE 8	PRICING ANALYSIS	97
5.11	PATENT ANALYSIS	98
5.11.1	METHODOLOGY	98
5.11.2	DOCUMENT TYPE	98
TABLE 9	PATENTS FILED, 2013-2023	98
5.11.3	INNOVATION AND PATENT APPLICATIONS	98
FIGURE 25	TOTAL NUMBER OF PATENTS GRANTED ANNUALLY, 2013-2023	98
5.11.3.1	Top applicants	99
FIGURE 26	TOP 10 COMPANIES WITH HIGHEST NUMBER OF PATENT APPLICATIONS, 2013-2023	99
TABLE 10	TOP 20 PATENT OWNERS IN DIGITAL TRANSFORMATION MARKET, 2013-2023	99
5.12	KEY CONFERENCES & EVENTS IN 2023-2024	100
TABLE 11	DIGITAL TRANSFORMATION MARKET: LIST OF CONFERENCES & EVENTS	100
5.13	TARIFF AND REGULATORY LANDSCAPE	102
5.13.1	REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	102
TABLE 12	NORTH AMERICA: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	102
TABLE 13	EUROPE: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	102
TABLE 14	ASIA PACIFIC: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	103
TABLE 15	MIDDLE EAST & AFRICA: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	103
TABLE 16	LATIN AMERICA: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	104
5.14	TRENDS/DISRUPTIONS IMPACTING BUYERS/CLIENTS IN DIGITAL TRANSFORMATION MARKET	104
FIGURE 27	DIGITAL TRANSFORMATION MARKET: TRENDS/DISRUPTIONS IMPACTING BUYERS/CLIENTS	104
5.15	KEY STAKEHOLDERS AND BUYING CRITERIA	105
5.15.1	KEY STAKEHOLDERS IN BUYING PROCESS	105

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

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

www.scotts-international.com

FIGURE 28 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR TOP THREE VERTICALS 105

TABLE 17 INFLUENCE OF STAKEHOLDERS IN BUYING PROCESS FOR TOP THREE VERTICALS (%) 105

5.15.2 BUYING CRITERIA 106

FIGURE 29 KEY BUYING CRITERIA FOR TOP THREE VERTICALS 106

TABLE 18 KEY BUYING CRITERIA FOR TOP THREE VERTICALS 106

5.16 BEST PRACTISES IN DIGITAL TRANSFORMATION MARKET 106

5.16.1 SYNCHRONIZING EFFORTS 106

5.16.2 ALIGNING STAFFS 107

5.16.3 LOOKING THROUGH PERSPECTIVE OF CUSTOMERS 107

5.16.4 LEVERAGING LATEST TECHNOLOGY 107

5.17 VALUE PROPOSITION - BY INDUSTRY 107

TABLE 19 VALUE PROPOSITION 107

5.18 TECHNOLOGY ROADMAP OF DIGITAL TRANSFORMATION MARKET 108

TABLE 20 TECHNOLOGY ROADMAP OF DIGITAL TRANSFORMATION MARKET, 2023-2030 108

5.19 BUSINESS MODELS OF DIGITAL TRANSFORMATION MARKET 110

FIGURE 30 BUSINESS MODELS OF DIGITAL TRANSFORMATION MARKET 110

5.20 MATURITY MODELS OF DIGITAL TRANSFORMATION MARKET 111

FIGURE 31 MATURITY MODELS OF DIGITAL TRANSFORMATION MARKET 111

6 DIGITAL TRANSFORMATION MARKET, BY OFFERING 112

6.1 INTRODUCTION 113

6.1.1 OFFERING: DIGITAL TRANSFORMATION MARKET DRIVERS 113

FIGURE 32 SERVICES SEGMENT TO GROW AT HIGHER CAGR DURING FORECAST PERIOD 113

TABLE 21 DIGITAL TRANSFORMATION MARKET, BY OFFERING, 2018-2022 (USD MILLION) 114

TABLE 22 DIGITAL TRANSFORMATION MARKET, BY OFFERING, 2023-2030 (USD MILLION) 114

6.2 SOLUTIONS 114

6.2.1 DIGITAL TRANSFORMATION SOLUTIONS TO BE USED ACROSS ALL SECTORS TO DIGITALIZE PROCESS 114

TABLE 23 SOLUTIONS: DIGITAL TRANSFORMATION MARKET, BY REGION, 2018-2022 (USD MILLION) 114

TABLE 24 SOLUTIONS: DIGITAL TRANSFORMATION MARKET, BY REGION, 2023-2030 (USD MILLION) 115

6.2.2 BY DEPLOYMENT MODE 115

TABLE 25 DIGITAL TRANSFORMATION MARKET, BY DEPLOYMENT MODE, 2018-2022 (USD MILLION) 115

TABLE 26 DIGITAL TRANSFORMATION MARKET, BY DEPLOYMENT MODE, 2023-2030 (USD MILLION) 115

6.2.2.1 Cloud 116

6.2.2.1.1 Availability of subscription-based cloud solutions to offer flexibility and ease of adoption to end users 116

TABLE 27 CLOUD: DIGITAL TRANSFORMATION MARKET, BY REGION, 2018-2022 (USD MILLION) 116

TABLE 28 CLOUD: DIGITAL TRANSFORMATION MARKET, BY REGION, 2023-2030 (USD MILLION) 117

6.2.2.2 On-Premises 117

6.2.2.2.1 Security concerns over sensitive data to drive adoption of on-premises solutions 117

TABLE 29 ON-PREMISES: DIGITAL TRANSFORMATION MARKET, BY REGION, 2018-2022 (USD MILLION) 117

TABLE 30 ON-PREMISES: DIGITAL TRANSFORMATION MARKET, BY REGION, 2023-2030 (USD MILLION) 118

6.3 SERVICES 118

6.3.1 COMPLEX ALGORITHMS OF ADVANCED TECHNOLOGIES TO PROVIDE ONLINE AND OFFLINE SUPPORT SERVICES TO AI VENDORS 118

TABLE 31 DIGITAL TRANSFORMATION MARKET, BY SERVICE, 2018-2022 (USD MILLION) 118

TABLE 32 DIGITAL TRANSFORMATION MARKET, BY SERVICE, 2023-2030 (USD MILLION) 119

TABLE 33 SERVICES: DIGITAL TRANSFORMATION MARKET, BY REGION, 2018-2022 (USD MILLION) 119

TABLE 34 SERVICES: DIGITAL TRANSFORMATION MARKET, BY REGION, 2023-2030 (USD MILLION) 119

6.3.2 CONSULTING SERVICES 120

TABLE 35 □CONSULTING SERVICES: DIGITAL TRANSFORMATION MARKET, BY REGION, 2018-2022 (USD MILLION) □120

TABLE 36 □CONSULTING SERVICES: DIGITAL TRANSFORMATION MARKET, BY REGION, 2023-2030 (USD MILLION) □120

6.3.3 □SUPPORT & MAINTENANCE □120

TABLE 37 □SUPPORT & MAINTENANCE: DIGITAL TRANSFORMATION MARKET, BY REGION, 2018-2022 (USD MILLION) □121

TABLE 38 □SUPPORT & MAINTENANCE: DIGITAL TRANSFORMATION MARKET, BY REGION, 2023-2030 (USD MILLION) □121

6.3.4 □PLANNING & DESIGNING □121

TABLE 39 □PLANNING & DESIGNING: DIGITAL TRANSFORMATION MARKET, BY REGION, 2018-2022 (USD MILLION) □121

TABLE 40 □PLANNING & DESIGNING: DIGITAL TRANSFORMATION MARKET, BY REGION, 2023-2030 (USD MILLION) □121

6.3.5 □ENGINEERING & RE-ENGINEERING SERVICES □122

TABLE 41 □ENGINEERING & RE-ENGINEERING SERVICES: DIGITAL TRANSFORMATION MARKET, BY REGION, 2018-2022 (USD MILLION) □122

TABLE 42 □ENGINEERING & RE-ENGINEERING SERVICES: DIGITAL TRANSFORMATION MARKET, BY REGION, 2023-2030 (USD MILLION) □123

6.3.6 □NETWORK & INFRASTRUCTURE MANAGEMENT □123

TABLE 43 □NETWORK & INFRASTRUCTURE MANAGEMENT: DIGITAL TRANSFORMATION MARKET, BY REGION, 2018-2022 (USD MILLION) □123

TABLE 44 □NETWORK & INFRASTRUCTURE MANAGEMENT: DIGITAL TRANSFORMATION MARKET, BY REGION, 2023-2030 (USD MILLION) □124

6.3.7 □APPLICATION DEVELOPMENT □124

TABLE 45 □APPLICATION DEVELOPMENT: DIGITAL TRANSFORMATION MARKET, BY REGION, 2018-2022 (USD MILLION) □124

TABLE 46 □APPLICATION DEVELOPMENT: DIGITAL TRANSFORMATION MARKET, BY REGION, 2023-2030 (USD MILLION) □124

7 □DIGITAL TRANSFORMATION MARKET, BY TECHNOLOGY □125

7.1 □INTRODUCTION □126

7.1.1 □TECHNOLOGY: DIGITAL TRANSFORMATION MARKET DRIVERS □126

FIGURE 33 □ARTIFICIAL INTELLIGENCE SEGMENT TO GROW AT HIGHEST CAGR DURING FORECAST PERIOD □127

TABLE 47 □DIGITAL TRANSFORMATION MARKET, BY TECHNOLOGY, 2018-2022 (USD MILLION) □127

TABLE 48 □DIGITAL TRANSFORMATION MARKET, BY TECHNOLOGY, 2023-2030 (USD MILLION) □127

7.2 □CLOUD COMPUTING □128

7.2.1 □NEED FOR DATA SECURITY, FASTER DISASTER RECOVERY, AND MEETING COMPLIANCE REQUIREMENTS TO DRIVE GROWTH □128

TABLE 49 □CLOUD COMPUTING: DIGITAL TRANSFORMATION MARKET, BY REGION, 2018-2022 (USD MILLION) □128

TABLE 50 □CLOUD COMPUTING: DIGITAL TRANSFORMATION MARKET, BY REGION, 2023-2030 (USD MILLION) □129

7.3 □ARTIFICIAL INTELLIGENCE □129

7.3.1 □CUSTOMER SATISFACTION ENHANCEMENT AND INCREASED PRODUCTIVITY TO DRIVE GROWTH □129

TABLE 51 □ARTIFICIAL INTELLIGENCE: DIGITAL TRANSFORMATION MARKET, BY REGION, 2018-2022 (USD MILLION) □130

TABLE 52 □ARTIFICIAL INTELLIGENCE: DIGITAL TRANSFORMATION MARKET, BY REGION, 2023-2030 (USD MILLION) □130

7.4 □BIG DATA & ANALYTICS □130

7.4.1 □RISING UNSTRUCTURED DATA AND NEED TO OPTIMIZE LARGE DATA WORKLOADS TO DRIVE DEMAND □130

TABLE 53 □BIG DATA & ANALYTICS: DIGITAL TRANSFORMATION MARKET, BY REGION, 2018-2022 (USD MILLION) □131

TABLE 54 □BIG DATA & ANALYTICS: DIGITAL TRANSFORMATION MARKET, BY REGION, 2023-2030 (USD MILLION) □131

7.5 □BLOCKCHAIN □131

7.5.1 □ADOPTION OF BLOCKCHAIN TECHNOLOGY TO CATALYZE DIGITAL TRANSFORMATION BY REVOLUTIONIZING PROCESSES □131

TABLE 55 □BLOCKCHAIN: DIGITAL TRANSFORMATION MARKET, BY REGION, 2018-2022 (USD MILLION) □132

TABLE 56 □BLOCKCHAIN: DIGITAL TRANSFORMATION MARKET, BY REGION, 2023-2030 (USD MILLION) □132

7.6 □CYBERSECURITY □132

7.6.1 □GROWING CYBERATTACKS, DATA BREACHES, AND IDENTITY THEFTS TO INCREASE DEMAND FOR CYBERSECURITY □132

TABLE 57 □CYBERSECURITY: DIGITAL TRANSFORMATION MARKET, BY REGION, 2018-2022 (USD MILLION) □133

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

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

www.scotts-international.com

TABLE 58 □ CYBERSECURITY: DIGITAL TRANSFORMATION MARKET, BY REGION, 2023-2030 (USD MILLION) □ 133

7.7 □ INTERNET OF THINGS □ 134

7.7.1 □ INTERNET OF THINGS TO HELP ORGANIZATIONS INCREASE OPERATIONAL EFFICIENCY AND PROVIDE PROFICIENT CUSTOMER SERVICE □ 134

TABLE 59 □ INTERNET OF THINGS: DIGITAL TRANSFORMATION MARKET, BY REGION, 2018-2022 (USD MILLION) □ 134

TABLE 60 □ INTERNET OF THINGS: DIGITAL TRANSFORMATION MARKET, BY REGION, 2023-2030 (USD MILLION) □ 134

8 □ DIGITAL TRANSFORMATION MARKET, BY BUSINESS FUNCTION □ 135

8.1 □ INTRODUCTION □ 136

8.1.1 □ BUSINESS FUNCTION: DIGITAL TRANSFORMATION MARKET DRIVERS □ 136

FIGURE 34 □ HUMAN RESOURCE SEGMENT TO GROW AT HIGHEST CAGR DURING FORECAST PERIOD □ 136

TABLE 61 □ DIGITAL TRANSFORMATION MARKET, BY BUSINESS FUNCTION, 2018-2022 (USD MILLION) □ 137

TABLE 62 □ DIGITAL TRANSFORMATION MARKET, BY BUSINESS FUNCTION, 2023-2030 (USD MILLION) □ 137

8.2 □ DIGITAL TRANSFORMATION: ENTERPRISE USE CASES □ 137

8.3 □ ACCOUNTING & FINANCE □ 138

8.3.1 □ ADVANCED TECHNOLOGIES TO GENERATE NEW POSSIBILITIES AND ACCELERATE REVOLUTION OF FINANCE ACROSS BUSINESSES □ 138

TABLE 63 □ ACCOUNTING & FINANCE: DIGITAL TRANSFORMATION MARKET, BY REGION, 2018-2022 (USD MILLION) □ 138

TABLE 64 □ ACCOUNTING & FINANCE: DIGITAL TRANSFORMATION MARKET, BY REGION, 2023-2030 (USD MILLION) □ 138

8.4 □ IT & OPERATIONS □ 139

8.4.1 □ RAPID ADOPTION OF DIGITAL TRANSFORMATION SOLUTIONS TO HELP MAINTAIN DATA CONFIDENTIALITY AND INTEGRITY □ 139

TABLE 65 □ IT & OPERATIONS: DIGITAL TRANSFORMATION MARKET, BY REGION, 2018-2022 (USD MILLION) □ 139

TABLE 66 □ IT & OPERATIONS: DIGITAL TRANSFORMATION MARKET, BY REGION, 2023-2030 (USD MILLION) □ 140

8.5 □ HUMAN RESOURCES □ 140

8.5.1 □ DIGITAL TRANSFORMATION IN HUMAN RESOURCES TO PROVIDE ENHANCED DATA-DRIVEN JUDGMENT AND IMPROVED STAFF ENGAGEMENT □ 140

TABLE 67 □ HUMAN RESOURCE: DIGITAL TRANSFORMATION MARKET, BY REGION, 2018-2022 (USD MILLION) □ 140

TABLE 68 □ HUMAN RESOURCE: DIGITAL TRANSFORMATION MARKET, BY REGION, 2023-2030 (USD MILLION) □ 141

8.6 □ MARKETING & SALES □ 141

8.6.1 □ DIGITAL TRANSFORMATION IN SALES & MARKETING TO PROVIDE WIDER MARKETING INSIGHTS AND CUSTOMER DATA □ 141

TABLE 69 □ MARKETING & SALES: DIGITAL TRANSFORMATION MARKET, BY REGION, 2018-2022 (USD MILLION) □ 142

TABLE 70 □ MARKETING & SALES: DIGITAL TRANSFORMATION MARKET, BY REGION, 2023-2030 (USD MILLION) □ 142

9 □ DIGITAL TRANSFORMATION MARKET, BY VERTICAL □ 143

9.1 □ INTRODUCTION □ 144

9.1.1 □ VERTICAL: DIGITAL TRANSFORMATION MARKET DRIVERS □ 144

FIGURE 35 □ BFSI TO ACCOUNT FOR LARGEST MARKET SIZE DURING FORECAST PERIOD □ 145

TABLE 71 □ DIGITAL TRANSFORMATION MARKET, BY VERTICAL, 2018-2022 (USD MILLION) □ 145

TABLE 72 □ DIGITAL TRANSFORMATION MARKET, BY VERTICAL, 2023-2030 (USD MILLION) □ 146

9.2 □ BFSI □ 146

9.2.1 □ IMPROVED BUSINESS PERFORMANCE AND REDUCED COST TO BOOST DEMAND FOR DIGITAL TRANSFORMATION SOLUTIONS □ 146

TABLE 73 □ BFSI: USE CASES □ 147

TABLE 74 □ BFSI: DIGITAL TRANSFORMATION MARKET, BY REGION, 2018-2022 (USD MILLION) □ 148

TABLE 75 □ BFSI: DIGITAL TRANSFORMATION MARKET, BY REGION, 2023-2030 (USD MILLION) □ 148

9.2.2 □ FRAUD DETECTION AND PREVENTION □ 148

9.2.3 □ ASSET AND INVESTMENT MANAGEMENT □ 148

9.2.4 □ CUSTOMER SERVICE AUTOMATION (CHATBOTS) □ 148

9.2.5 □ PERSONALIZED FINANCIAL RECOMMENDATIONS □ 149

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

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

www.scotts-international.com

9.2.6	REGULATORY COMPLIANCE MONITORING	149
9.2.7	OTHERS	149
9.3	RETAIL & E-COMMERCE	149
9.3.1	ADOPTION OF DIGITAL TRANSFORMATION SOLUTIONS TO BOOST BUSINESS DECISION PERFORMANCE AND PROFIT MARGINS	149
TABLE 76	RETAIL & E-COMMERCE: USE CASES	150
TABLE 77	RETAIL & E-COMMERCE: DIGITAL TRANSFORMATION MARKET, BY REGION, 2018-2022 (USD MILLION)	151
TABLE 78	RETAIL & E-COMMERCE: DIGITAL TRANSFORMATION MARKET, BY REGION, 2023-2030 (USD MILLION)	151
9.3.2	PERSONALIZED PRODUCT RECOMMENDATIONS	152
9.3.3	CUSTOMER RELATIONSHIP MANAGEMENT	152
9.3.4	PAYMENT SERVICES MANAGEMENT	152
9.3.5	VIRTUAL CUSTOMER SUPPORT	152
9.3.6	CONTACTLESS PAYMENTS AND MOBILE WALLETS	152
9.3.7	OTHERS	153
9.4	INFORMATION TECHNOLOGY/INFORMATION TECHNOLOGY-ENABLED SERVICES	153
9.4.1	DIGITALIZING BUSINESS PROCESSES TO MEET GROWING CUSTOMER DEMANDS TO DRIVE MARKET	153
TABLE 79	INFORMATION TECHNOLOGY/INFORMATION TECHNOLOGY-ENABLED SERVICES: USE CASES	153
TABLE 80	INFORMATION TECHNOLOGY/INFORMATION TECHNOLOGY-ENABLED SERVICES: DIGITAL TRANSFORMATION MARKET, BY REGION, 2018-2022 (USD MILLION)	154
TABLE 81	INFORMATION TECHNOLOGY/INFORMATION TECHNOLOGY-ENABLED SERVICES: DIGITAL TRANSFORMATION MARKET, BY REGION, 2023-2030 (USD MILLION)	154
9.4.2	AUTOMATED CODE GENERATION AND OPTIMIZATION	154
9.4.3	AUTOMATED IT ASSET MANAGEMENT	154
9.4.4	IT TICKETING AND SUPPORT AUTOMATION	155
9.4.5	INTELLIGENT DATA BACKUP AND RECOVERY	155
9.4.6	AUTOMATED SOFTWARE TESTING AND QUALITY ASSURANCE	155
9.4.7	OTHERS	156
9.5	MEDIA & ENTERTAINMENT	156
9.5.1	RISING CONTENT CONSUMPTION, DIGITAL ENTERTAINMENT, AND CLOUD ADOPTION TO GENERATE DEMAND FOR DIGITAL TRANSFORMATION	156
TABLE 82	MEDIA & ENTERTAINMENT: USE CASES	156
TABLE 83	MEDIA & ENTERTAINMENT: DIGITAL TRANSFORMATION MARKET, BY REGION, 2018-2022 (USD MILLION)	157
TABLE 84	MEDIA & ENTERTAINMENT: DIGITAL TRANSFORMATION MARKET, BY REGION, 2023-2030 (USD MILLION)	157
9.5.2	CONTENT RECOMMENDATION SYSTEMS	158
9.5.3	CONTENT CREATION AND GENERATION	158
9.5.4	CONTENT COPYRIGHT PROTECTION	158
9.5.5	AUDIENCE ENGAGEMENT AND PERSONALIZATION	158
9.5.6	PERSONALIZED ADVERTISING	158
9.5.7	OTHERS	159
9.6	MANUFACTURING	159
9.6.1	ADOPTION OF DIGITAL TRANSFORMATION WITH NEW TECHNOLOGIES TO BOOST PERFORMANCE AND IMPROVE DECISION-MAKING	159
TABLE 85	MANUFACTURING: USE CASES	160
TABLE 86	MANUFACTURING: DIGITAL TRANSFORMATION MARKET, BY REGION, 2018-2022 (USD MILLION)	160
TABLE 87	MANUFACTURING: DIGITAL TRANSFORMATION MARKET, BY REGION, 2023-2030 (USD MILLION)	161
9.6.2	PREDICTIVE MAINTENANCE AND MACHINERY INSPECTION	161
9.6.3	PRODUCTION PLANNING	161

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

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

www.scotts-international.com

9.6.4	DEFECT DETECTION AND PREVENTION	161
9.6.5	QUALITY CONTROL	162
9.6.6	PRODUCTION LINE OPTIMIZATION	162
9.6.7	INTELLIGENT INVENTORY MANAGEMENT	162
9.6.8	OTHERS	162
9.7	HEALTHCARE, LIFE SCIENCES & PHARMACEUTICALS	162
9.7.1	REAL-TIME DECISION-MAKING TO DELIVER PROPER INSIGHTS FOR PATIENTS TO BOOST NEED FOR DIGITAL TRANSFORMATION SOLUTIONS	162
TABLE 88	HEALTHCARE, LIFE SCIENCES & PHARMACEUTICALS: USE CASES	163
TABLE 89	HEALTHCARE, LIFE SCIENCES & PHARMACEUTICALS: DIGITAL TRANSFORMATION MARKET, BY REGION, 2018-2022 (USD MILLION)	164
TABLE 90	HEALTHCARE, LIFE SCIENCES & PHARMACEUTICALS: DIGITAL TRANSFORMATION MARKET, BY REGION, 2023-2030 (USD MILLION)	164
9.7.2	ELECTRONIC HEALTH RECORDS AND ELECTRONIC MEDICAL RECORDS (E-HR & E-MR)	164
9.7.3	TELEMEDICINE AND REMOTE PATIENT MONITORING	165
9.7.4	HEALTH INFORMATION EXCHANGE	165
9.7.5	MEDICAL IMAGING AND DIAGNOSTICS	165
9.7.6	HEALTH APPLICATIONS	165
9.7.7	OTHERS	165
9.8	ENERGY & UTILITIES	166
9.8.1	RISE IN NEED TO MANAGE MASSIVE AMOUNT OF MISSION-CRITICAL MATERIAL IN REAL TIME TO DRIVE MARKET	166
TABLE 91	ENERGY & UTILITIES: USE CASES	166
TABLE 92	ENERGY & UTILITIES: DIGITAL TRANSFORMATION MARKET, BY REGION, 2018-2022 (USD MILLION)	167
TABLE 93	ENERGY & UTILITIES: DIGITAL TRANSFORMATION MARKET, BY REGION, 2023-2030 (USD MILLION)	167
9.8.2	ENERGY DEMAND FORECASTING	167
9.8.3	GRID OPTIMIZATION AND MANAGEMENT	167
9.8.4	ENERGY CONSUMPTION ANALYTICS	168
9.8.5	SMART METERING AND ENERGY DATA MANAGEMENT	168
9.8.6	REAL-TIME ENERGY MONITORING AND CONTROL	168
9.8.7	OTHERS	168
9.9	GOVERNMENT & DEFENSE	168
9.9.1	TAX COLLECTION, SAFETY, PUBLIC INTEREST, AND CRITICAL INTERNATIONAL DATA SHARING TO BOOST GROWTH	168
TABLE 94	GOVERNMENT & DEFENSE: USE CASES	169
TABLE 95	GOVERNMENT & DEFENSE: DIGITAL TRANSFORMATION MARKET, BY REGION, 2018-2022 (USD MILLION)	170
TABLE 96	GOVERNMENT & DEFENSE: DIGITAL TRANSFORMATION MARKET, BY REGION, 2023-2030 (USD MILLION)	170
9.9.2	INTELLIGENCE ANALYSIS AND DATA PROCESSING	170
9.9.3	E-GOVERNANCE AND DIGITAL CITY SERVICES	170
9.9.4	BORDER SECURITY AND SURVEILLANCE	170
9.9.5	DIGITAL IDENTITY AND AUTHENTICATION	171
9.9.6	COMMAND AND CONTROL SYSTEMS	171
9.9.7	TAX AND REVENUE MANAGEMENT	171
9.9.8	OTHERS	171
9.10	TELECOMMUNICATIONS	171
9.10.1	INCREASING USE OF CONNECTED DEVICES, IOT, AND 5G TO HELP ADOPTION OF DIGITAL TRANSFORMATION SOLUTIONS	171
TABLE 97	TELECOMMUNICATIONS: USE CASES	172
TABLE 98	TELECOMMUNICATIONS: DIGITAL TRANSFORMATION MARKET, BY REGION, 2018-2022 (USD MILLION)	173
TABLE 99	TELECOMMUNICATIONS: DIGITAL TRANSFORMATION MARKET, BY REGION, 2023-2030 (USD MILLION)	173

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

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

www.scotts-international.com

9.10.2	NETWORK OPTIMIZATION	173
9.10.3	NETWORK SECURITY	173
9.10.4	CUSTOMER SERVICE AND SUPPORT	173
9.10.5	NETWORK PLANNING AND OPTIMIZATION	174
9.10.6	VOICE AND SPEECH RECOGNITION	174
9.10.7	OTHERS	174
9.11	EDUCATION	174
9.11.1	NEED FOR INNOVATIVE AND FLEXIBLE LEARNING SOLUTIONS IN DIGITAL AGE TO DRIVE MARKET	174
TABLE 100	EDUCATION: USE CASES	175
TABLE 101	EDUCATION: DIGITAL TRANSFORMATION MARKET, BY REGION, 2018-2022 (USD MILLION)	175
TABLE 102	EDUCATION: DIGITAL TRANSFORMATION MARKET, BY REGION, 2023-2030 (USD MILLION)	175
9.11.2	MOBILE LEARNING	176
9.11.3	LEARNING MANAGEMENT SYSTEMS	176
9.11.4	ADAPTIVE LEARNING AND ASSESSMENT	176
9.11.5	DIGITAL TEXTBOOKS AND E-BOOKS	176
9.11.6	E-LEARNING	176
9.11.7	ADMINISTRATIVE AUTOMATION	177
9.11.8	OTHERS	177
9.12	AGRICULTURE	177
9.12.1	NEED FOR INCREASED FOOD PRODUCTION TO DRIVE MARKET	177
TABLE 103	AGRICULTURE: USE CASES	177
TABLE 104	AGRICULTURE: DIGITAL TRANSFORMATION MARKET, BY REGION, 2018-2022 (USD MILLION)	178
TABLE 105	AGRICULTURE: DIGITAL TRANSFORMATION MARKET, BY REGION, 2023-2030 (USD MILLION)	178
9.12.2	CROP MONITORING	178
9.12.3	YIELD MONITORING AND PREDICTION	178
9.12.4	IRRIGATION AND WATER MANAGEMENT	178
9.12.5	FEEDING MANAGEMENT	179
9.12.6	WEATHER AND CLIMATE MONITORING	179
9.12.7	FARM MANAGEMENT SYSTEMS	179
9.12.8	OTHERS	179
9.13	AUTOMOTIVE, TRANSPORTATION & LOGISTICS	179
9.13.1	INCREASING DEMAND FOR SEAMLESS CONNECTIVITY, AUTONOMOUS VEHICLES, AND EFFICIENT LOGISTICS TO DRIVE MARKET	179
TABLE 106	AUTOMOTIVE, TRANSPORTATION & LOGISTICS: USE CASES	180
TABLE 107	AUTOMOTIVE, TRANSPORTATION & LOGISTICS: DIGITAL TRANSFORMATION MARKET, BY REGION, 2018-2022 (USD MILLION)	180
TABLE 108	AUTOMOTIVE, TRANSPORTATION & LOGISTICS: DIGITAL TRANSFORMATION MARKET, BY REGION, 2023-2030 (USD MILLION)	180
9.13.2	ROUTE OPTIMIZATION	181
9.13.3	TRAFFIC MANAGEMENT	181
9.13.4	DRIVER ASSISTANCE SYSTEMS	181
9.13.5	FLEET MANAGEMENT	181
9.13.6	INTELLIGENT PARKING SYSTEMS	181
9.13.7	OTHERS	182
9.14	OTHER VERTICALS	182
TABLE 109	OTHER VERTICALS: DIGITAL TRANSFORMATION MARKET, BY REGION, 2018-2022 (USD MILLION)	182
TABLE 110	OTHER VERTICALS: DIGITAL TRANSFORMATION MARKET, BY REGION, 2023-2030 (USD MILLION)	183

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

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

www.scotts-international.com

## 10 DIGITAL TRANSFORMATION MARKET, BY REGION 184

### 10.1 INTRODUCTION 185

FIGURE 36 ASIA PACIFIC TO ACCOUNT FOR HIGHEST CAGR DURING FORECAST PERIOD 185

TABLE 111 DIGITAL TRANSFORMATION MARKET, BY REGION, 2018-2022 (USD MILLION) 185

TABLE 112 DIGITAL TRANSFORMATION MARKET, BY REGION, 2023-2030 (USD MILLION) 186

### 10.2 NORTH AMERICA 186

10.2.1 NORTH AMERICA: DIGITAL TRANSFORMATION MARKET DRIVERS 186

10.2.2 NORTH AMERICA: RECESSION IMPACT 187

TABLE 113 NORTH AMERICA: PROMINENT PLAYERS 187

FIGURE 37 NORTH AMERICA: MARKET SNAPSHOT 188

TABLE 114 NORTH AMERICA: DIGITAL TRANSFORMATION MARKET, BY OFFERING, 2018-2022 (USD MILLION) 188

TABLE 115 NORTH AMERICA: DIGITAL TRANSFORMATION MARKET, BY OFFERING, 2023-2030 (USD MILLION) 189

TABLE 116 NORTH AMERICA: DIGITAL TRANSFORMATION MARKET, BY DEPLOYMENT MODE, 2018-2022 (USD MILLION) 189

TABLE 117 NORTH AMERICA: DIGITAL TRANSFORMATION MARKET, BY DEPLOYMENT MODE, 2023-2030 (USD MILLION) 189

TABLE 118 NORTH AMERICA: DIGITAL TRANSFORMATION MARKET, BY SERVICE, 2018-2022 (USD MILLION) 189

TABLE 119 NORTH AMERICA: DIGITAL TRANSFORMATION MARKET, BY SERVICE, 2023-2030 (USD MILLION) 190

TABLE 120 NORTH AMERICA: DIGITAL TRANSFORMATION MARKET, BY TECHNOLOGY, 2018-2022 (USD MILLION) 190

TABLE 121 NORTH AMERICA: DIGITAL TRANSFORMATION MARKET, BY TECHNOLOGY, 2023-2030 (USD MILLION) 190

TABLE 122 NORTH AMERICA: DIGITAL TRANSFORMATION MARKET, BY BUSINESS FUNCTION, 2018-2022 (USD MILLION) 191

TABLE 123 NORTH AMERICA: DIGITAL TRANSFORMATION MARKET, BY BUSINESS FUNCTION, 2023-2030 (USD MILLION) 191

TABLE 124 NORTH AMERICA: DIGITAL TRANSFORMATION MARKET, BY VERTICAL, 2018-2022 (USD MILLION) 191

TABLE 125 NORTH AMERICA: DIGITAL TRANSFORMATION MARKET, BY VERTICAL, 2023-2030 (USD MILLION) 192

TABLE 126 NORTH AMERICA: DIGITAL TRANSFORMATION MARKET, BY COUNTRY, 2018-2022 (USD MILLION) 192

TABLE 127 NORTH AMERICA: DIGITAL TRANSFORMATION MARKET, BY COUNTRY, 2023-2030 (USD MILLION) 192

### 10.2.3 US 193

10.2.3.1 Increase in digitalization in various verticals to drive growth 193

TABLE 128 US: DIGITAL TRANSFORMATION MARKET, BY OFFERING, 2018-2022 (USD MILLION) 193

TABLE 129 US: DIGITAL TRANSFORMATION MARKET, BY OFFERING, 2023-2030 (USD MILLION) 193

TABLE 130 US: DIGITAL TRANSFORMATION MARKET, BY DEPLOYMENT MODE, 2018-2022 (USD MILLION) 194

TABLE 131 US: DIGITAL TRANSFORMATION MARKET, BY DEPLOYMENT MODE, 2023-2030 (USD MILLION) 194

TABLE 132 US: DIGITAL TRANSFORMATION MARKET, BY TECHNOLOGY, 2018-2022 (USD MILLION) 194

TABLE 133 US: DIGITAL TRANSFORMATION MARKET, BY TECHNOLOGY, 2023-2030 (USD MILLION) 194

### 10.2.4 CANADA 195

10.2.4.1 Huge investments and growing availability of advanced technologies to drive growth 195

## 10.3 EUROPE 195

10.3.1 EUROPE: DIGITAL TRANSFORMATION MARKET DRIVERS 196

10.3.2 EUROPE: RECESSION IMPACT 196

TABLE 134 EUROPE: PROMINENT PLAYERS 197

TABLE 135 EUROPE: DIGITAL TRANSFORMATION MARKET, BY OFFERING, 2018-2022 (USD MILLION) 197

TABLE 136 EUROPE: DIGITAL TRANSFORMATION MARKET, BY OFFERING, 2023-2030 (USD MILLION) 197

TABLE 137 EUROPE: DIGITAL TRANSFORMATION MARKET, BY DEPLOYMENT MODE, 2018-2022 (USD MILLION) 197

TABLE 138 EUROPE: DIGITAL TRANSFORMATION MARKET, BY DEPLOYMENT MODE, 2023-2030 (USD MILLION) 198

TABLE 139 EUROPE: DIGITAL TRANSFORMATION MARKET, BY SERVICE, 2018-2022 (USD MILLION) 198

TABLE 140 EUROPE: DIGITAL TRANSFORMATION MARKET, BY SERVICE, 2023-2030 (USD MILLION) 198

TABLE 141 EUROPE: DIGITAL TRANSFORMATION MARKET, BY TECHNOLOGY, 2018-2022 (USD MILLION) 199

TABLE 142 EUROPE: DIGITAL TRANSFORMATION MARKET, BY TECHNOLOGY, 2023-2030 (USD MILLION) 199

TABLE 143 EUROPE: DIGITAL TRANSFORMATION MARKET, BY BUSINESS FUNCTION, 2018-2022 (USD MILLION) 199

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

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

www.scotts-international.com

TABLE 144 EUROPE: DIGITAL TRANSFORMATION MARKET, BY BUSINESS FUNCTION, 2023-2030 (USD MILLION) 200

TABLE 145 EUROPE: DIGITAL TRANSFORMATION MARKET, BY VERTICAL, 2018-2022 (USD MILLION) 200

TABLE 146 EUROPE: DIGITAL TRANSFORMATION MARKET, BY VERTICAL, 2023-2030 (USD MILLION) 201

TABLE 147 EUROPE: DIGITAL TRANSFORMATION MARKET, BY COUNTRY, 2018-2022 (USD MILLION) 201

TABLE 148 EUROPE: DIGITAL TRANSFORMATION MARKET, BY COUNTRY, 2023-2030 (USD MILLION) 202

10.3.3 UK 202

10.3.3.1 Advanced IT infrastructure and initiatives boosting digital transformation to drive demand 202

TABLE 149 UK: DIGITAL TRANSFORMATION MARKET, BY OFFERING, 2018-2022 (USD MILLION) 203

TABLE 150 UK: DIGITAL TRANSFORMATION MARKET, BY OFFERING, 2023-2030 (USD MILLION) 203

TABLE 151 UK: DIGITAL TRANSFORMATION MARKET, BY DEPLOYMENT MODE, 2018-2022 (USD MILLION) 203

TABLE 152 UK: DIGITAL TRANSFORMATION MARKET, BY DEPLOYMENT MODE, 2023-2030 (USD MILLION) 203

TABLE 153 UK: DIGITAL TRANSFORMATION MARKET, BY TECHNOLOGY, 2018-2022 (USD MILLION) 204

TABLE 154 UK: DIGITAL TRANSFORMATION MARKET, BY TECHNOLOGY, 2023-2030 (USD MILLION) 204

10.3.4 GERMANY 204

10.3.4.1 Huge investments in technological developments and government initiatives to drive demand 204

10.3.5 FRANCE 205

10.3.5.1 Heavy demand for digitalization along with huge investments in R&D to drive growth 205

10.3.6 POLAND 205

10.3.6.1 Private and public sectors to rapidly adopt digital transformation solutions 205

10.3.7 SPAIN 205

10.3.7.1 Initiatives taken by government to promote widespread adoption of AI 205

10.3.8 ITALY 206

10.3.8.1 Rising adoption of cutting-edge technologies to drive growth 206

10.3.9 REST OF EUROPE 206

**Digital Transformation Market by Offering (Solutions & Services), Technology (Cloud Computing, Big Data & Analytics, Blockchain, Cybersecurity, AI), Business Function (Accounting & Finance, IT, HR), Vertical,& Region - Global Forecast to 2030**

Market Report | 2023-07-21 | 353 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"/>
Zip Code*	<input type="text"/>	Country*	<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

Date

2025-05-20

Signature

A large, empty rectangular box intended for a signature.

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

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

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