

## **AI Orchestration Market by Offering (Agent Orchestration Platforms, Model Serving Tools, Agent Builders, Data Orchestration Platforms), Deployment Model (SaaS, Air-gapped), Application (ITSM, Marketing Automation, Field Services) - Global Forecast to 2030**

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### **Report description:**

The global AI orchestration market size is projected to grow from USD 11.02 billion in 2025 to USD 30.23 billion by 2030, at a CAGR of 22.3%. Growth is being driven by the increasing need for a unified governance layer across applications, as organizations seek centralized approvals, lineage tracking, and policy enforcement that apply uniformly across IT and business workflows. Regulatory pressure is also adding momentum, with compliance frameworks in banking, healthcare, and the public sector driving buyers toward audit-ready orchestration layers that incorporate evidence, role-aware approvals, and rollback controls.

<https://mnmmimg.marketsandmarkets.com/Images/ai-orchestration-market-overview.webp>

These factors are turning AI orchestration into the central layer of enterprise automation strategies, bridging assistants, workflows, and legacy systems with transparent controls. Vendors that can combine fast time-to-value with governance, portable policies, and measurable ROI are expected to lead adoption as enterprises expand orchestrated actions across customer service, IT operations, security, finance, and supply chain use cases. The intricate nature of pricing structures and the division of budgets across functions are impeding enterprise-level commitments. Additionally, the potential for unintentional write-backs is constraining the autonomy of AI orchestration tools, which could hinder overall market expansion.

"Agent builder tools offering to witness breakout demand over the forecast period as enterprises scale from assist to safe, production-grade actions"

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Agent builder tools are emerging as a standout growth engine within AI orchestration, enabling teams to move quickly without compromising data control. Business users can compose agents with prebuilt actions, while platform teams set typed inputs and outputs, approvals, and limits, ensuring that every write-back is traceable and reversible. Dividing responsibilities helps reduce build time and ensures consistent governance across various areas, including customer service, IT operations, finance, and supply chain management. Vendors are providing catalogs of ready-to-use actions for common tasks such as case updates, entitlement checks, data lookups, and change requests. Additionally, they offer evaluation kits to assist with testing plans and selecting tools before implementation.

Low-code and pro-code options run side by side, allowing a service owner to assemble a flow and an engineer to add secure connectors or custom actions without requiring rework. Pricing aligns with real usage, featuring a mix of builder seats and action consumption, which enables departments to start small and scale with confidence. As organizations expand from pilots to live, policy-bound automation, these tools act as the assembly line for new agents, feeding orchestrators with consistent telemetry and evidence. The result is a faster time to first value, cleaner audits, and a growing library of reusable agents that run across multi-tenant SaaS, single-tenant SaaS, or customer-managed cloud environments.

"BFSI end user leads AI orchestration adoption in 2025, driven by regulated workflows and measurable ROI"

Banking, financial services, and insurance (BFSI) represent the largest end-user segment in the AI orchestration market, reflecting the scale of operations and the intensity of regulatory oversight. Institutions are under pressure to streamline processes such as KYC updates, payment investigations, loan approvals, and claims handling while keeping every step auditable. Orchestration platforms provide the governance layer necessary to ensure that actions are bound by policy, approvals are enforced based on role, and evidence is logged for regulators and auditors. This helps banks and insurers reduce exception handling costs and expedite resolution times without compromising compliance. Vendors such as IBM, Palantir, and UiPath have already showcased BFSI case studies where orchestrated workflows reduced manual touchpoints, ensured audit readiness, and improved customer satisfaction scores.

Growth is reinforced by the high transaction volume and risk profile of BFSI operations, which makes orchestration's combination of speed and control especially attractive. For example, orchestrated agents can automatically flag anomalies, assemble evidence, and route approvals in payment flows, while ensuring that rollback is always possible. BFSI is expected to contribute the largest revenue share in 2025 and set the pace for adoption in other regulated industries, demonstrating that AI orchestration can deliver both efficiency and compliance at scale.

"North America will have the largest market share in 2025, and Asia Pacific is slated to grow at the fastest rate during the forecast period"

North America is set to capture the largest share of AI orchestration revenue in 2025, anchored by the US with additional momentum from Canada. Enterprises in the region are moving beyond pilots and are standardizing on an orchestration layer that can execute approved actions inside CRM, ERP, ITSM, and data platforms with full evidence. Demand is strongest in banking, healthcare, telecom, software, and public sector programs where audit trails, identity scopes, and clean rollback are non-negotiable. The region benefits from deep hyperscaler footprints and a dense network of global system integrators and boutique specialists that package certified connectors, industry playbooks, and managed services. Buyers also favor deployment choice.

Customer-managed and single-tenant options are commonly used for sensitive workloads, while multi-tenant SaaS supports rapid entry and departmental expansion. Procurement teams request unit economics dashboards, exportable run telemetry, and reference architectures that integrate with existing observability stacks. As organizations expand from assist use cases to governed write-backs and broaden coverage across service, operations, and finance, North America's large installed base and compliance intensity sustain leadership and drive multi-year, portfolio-level rollouts across Fortune 1000 accounts.

Meanwhile, Asia Pacific is expected to record the fastest growth through 2025-2030 as large, distributed enterprises push for efficiency and local regulators clarify rules for responsible AI. Telecom operators, manufacturers, banks, and public agencies in India, China, Japan, and South Korea are scaling programs that connect planning, tool execution, and approvals in one governed run. Growth is facilitated by rising cloud adoption, local data center build-outs, and the need to automate exception-heavy processes across shared-service hubs and field operations. Vendors are tailoring offers to regional needs with localized

connectors, language support, and deployment choices that include customer-managed cloud and on-premises runtimes for data residency and key control.

Partners in the region, including global system integrators, local consulting firms, and channel providers, are creating rapid-start kits for various use cases such as customer service automation, IT incident response, and handling non-conformance issues. These kits help organizations achieve quicker returns on investment. As companies assess improvements in cycle time, accuracy, and cost-to-serve, they are likely to shift their budgets from experimentation to expansion. This trend positions the Asia Pacific region as the most dynamic growth driver for AI orchestration in the coming years.

#### 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 AI orchestration market.

-□By Company: Tier I - 33%, Tier II - 44%, and Tier III - 23%

-□By Designation: C-Level Executives - 36%, D-Level Executives - 41%, and others - 23%

-□By Region: North America - 39%, Europe - 18%, Asia Pacific - 32%, Middle East & Africa - 4%, and Latin America - 7%

The report includes the study and in-depth company profiles of key players offering AI orchestration software and services. The major players in the AI orchestration market include IBM (US), AWS (US), Salesforce (US), Adobe (US), Microsoft (US), SAP (Germany), Google (US), Coforge (India), ServiceNow (US), UiPath (US), NVIDIA (US), LivePerson (US), Genesys (US), Palantir (US), Kore.ai (US), Altair (US), Yellow.ai (US), Glean (US), Digital.ai (US), Workato (US), Appian (US), Solace (Canada), Jitterbit (US), SnapLogic (US), Aisera (US), OneReach.ai (US), Domino Data Labs (US), Anyscale (US), Forethought.ai (US), Vue.ai (US), Rafay Systems (US), Spacelift.io (US), Airia (US), Dagster Labs (US), Humanitec (Germany), Tonkean (US), Akka.io (US), SparkBeyond (US), Union.ai (US), Orkes (US), Teneo.ai (Sweden), Orby AI (US), Multimodal.dev (US), and Hopsworks (Sweden).

#### Research Coverage

This research report categorizes the AI orchestration market by offering, orchestration architecture, deployment model, application, and end user. The offering segment is split into AI orchestration software and AI orchestration services. The software segment is further split into agent orchestration platforms, agent builder tools, workflow orchestration platforms, data orchestration platforms, model serving platforms, and infrastructure orchestration platforms. The services segment comprises managed services and professional services (training and consulting, system integration and implementation, and support and maintenance). The orchestration architecture segment includes centralized orchestration, decentralized orchestration, distributed orchestration, and hybrid orchestration. The deployment model segment spans single tenant SaaS, multi-tenant SaaS, customer managed cloud, and on-premises & air gapped deployment.

Application segment covers customer service automation, sales & revenue automation, marketing automation, IT service management, security operations, finance & procurement automation, supply chain automation, HR & employee service desk, enterprise knowledge search, software engineering & coding automation, field service & asset operations, and other applications (legal operations & contract lifecycle, risk & internal audit, and research & lab workflows). The end user segment is split into BFSI, retail & CPG, professional service providers, healthcare & life sciences, telecommunications, software & technology providers, media & entertainment, logistics & transportation, government & defense, automotive, energy & utilities, manufacturing, and other enterprises (education, travel & hospitality, and construction & real estate). The regional analysis of the AI orchestration market covers North America, Europe, Asia Pacific, the Middle East & Africa (MEA), and Latin America.

The report's scope encompasses detailed information on the major factors, including drivers, restraints, challenges, and opportunities, that influence the growth of the AI orchestration market. A detailed analysis of key industry players has been conducted to provide insights into their business overview, solutions, and services, as well as key strategies, contracts, partnerships, agreements, new product & service launches, mergers and acquisitions, and recent developments associated with the AI orchestration market. This report covers the competitive analysis of upcoming startups in the AI orchestration market ecosystem.

#### Key Benefits of Buying the Report

The report will provide market leaders and new entrants with information on the closest approximations of the revenue numbers for the overall AI orchestration market and its subsegments. It would help stakeholders understand the competitive landscape and

gain more insights to better 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 into the following pointers:

Analysis of key drivers (enterprise shift from reactive chat to governed, outcome-linked automation; AI orchestration reducing cost-to-serve and time-to-resolution by executing system actions; need for a common governance layer across apps to centralize approvals, lineage, and policy enforcement; stringent focus on regulatory compliance pushing buyers toward governed AI orchestration), restraints (pricing complexity and cross-function budget splits stalling enterprise-wide commitments; risk of unintended write-backs limiting autonomy and efficiency of AI orchestration tools), opportunities (demand for sovereign and air-gapped AI orchestration in public sector and regulated industries; replacement of overlapping RPA, iPaaS, and workflow stacks with AI orchestration suites; prebuilt template libraries and certified action packs accelerating ROI cycles for mid-market), and challenges (enterprise app sprawl across multi-cloud environments causing vendor lock-in concerns; end-to-end observability across multi-agent orchestration remains complex)

Product Development/Innovation: Detailed insights into upcoming technologies, research & development activities, and new product & service launches in the AI orchestration market

Market Development: Comprehensive information about lucrative markets - analysis of the AI orchestration market across varied regions

Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the AI orchestration market

Competitive Assessment: In-depth assessment of market shares, growth strategies and service offerings of IBM (US), AWS (US), Salesforce (US), Adobe (US), Microsoft (US), SAP (Germany), Google (US), Coforge (India), ServiceNow (US), UiPath (US), NVIDIA (US), LivePerson (US), Genesys (US), Palantir (US), Kore.ai (US), Altair (US), Yellow.ai (US), Glean (US), Digital.ai (US), Workato (US), Appian (US), Solace (Canada), Jitterbit (US), SnapLogic (US), Aisera (US), OneReach.ai (US), Domino Data Labs (US), Anyscale (US), Forethought.ai (US), Vue.ai (US), Rafay Systems (US), Spacelift.io (US), Airia (US), Dagster Labs (US), Humanitec (Germany), Tonkean (US), Akka.io (US), SparkBeyond (US), Union.ai (US), Orkes (US), Teneo.ai (Sweden), Orby AI (US), Multimodal.dev (US), and Hopsworks (Sweden), among others, in the AI orchestration market. The report also helps stakeholders understand the pulse of the AI orchestration market and provides them with information on key market drivers, restraints, challenges, and opportunities.

## **Table of Contents:**

1	INTRODUCTION	48
1.1	STUDY OBJECTIVES	48
1.2	MARKET DEFINITION	48
1.2.1	INCLUSIONS AND EXCLUSIONS	49
1.3	MARKET SCOPE	50
1.3.1	MARKET SEGMENTATION	50
1.3.2	YEARS CONSIDERED	51
1.4	CURRENCY CONSIDERED	51
1.5	STAKEHOLDERS	51
2	RESEARCH METHODOLOGY	53
2.1	RESEARCH DATA	53
2.1.1	SECONDARY DATA	54
2.1.2	PRIMARY DATA	54
2.1.2.1	Breakup of primary profiles	55
2.1.2.2	Key industry insights	55
2.2	MARKET BREAKUP AND DATA TRIANGULATION	56
2.3	MARKET SIZE ESTIMATION	57

2.3.1 TOP-DOWN APPROACH	57
2.3.2 BOTTOM-UP APPROACH	57
2.4 MARKET FORECAST	61
2.5 RESEARCH ASSUMPTIONS	62
2.6 RESEARCH LIMITATIONS	64
3 EXECUTIVE SUMMARY	65
3.1 RISE OF AI ORCHESTRATION	65
3.2 UNDERSTANDING AI ORCHESTRATION: SCOPE AND BOUNDARIES	65
3.2.1 CONTROL PLANE VS. EXECUTION PLANE VS. DATA PLANE	66
3.2.2 GOVERNANCE, EVALUATION, AND OBSERVABILITY LOOPS	66
3.2.3 BOUNDARIES VS. IPAAS, RPA, AND AI ORCHESTRATION	67
3.3 PACKAGING AND MONETIZATION	67
3.3.1 STANDALONE ORCHESTRATOR SKUS VS. SUITE COMPONENTS	67
3.3.2 PRIMARY PRICING METRICS: USER, TASK, TOKEN, RUNTIME	67
3.3.3 CONNECTOR AND ACTION MONETIZATION	68
3.4 KPIs AND VALUE REALIZATION	68
3.4.1 AUTOMATION RATE, COST PER TASK, AND MTTR	68
3.4.2 ACCURACY, COMPLIANCE, AND AUDIT READINESS	68
3.4.3 ADOPTION, SEAT INTENSITY, AND ROI PROOF POINTS	68
?	
3.5 STRATEGIC IMPERATIVES FOR DECISION-MAKERS	69
3.5.1 CHOOSING ORCHESTRATION TYPE ALIGNED TO WORKLOAD	69
3.5.2 LANDING WITH GOVERNED PILOT AND MEASURABLE KPIs	69
3.5.3 BUILDING OPERATING MODEL: STEWARDSHIP, APPROVALS, RUNBOOKS	70
3.5.4 SCALING THROUGH TEMPLATES, CONNECTOR COVERAGE, AND GUARDRAILS	70
3.6 OUTLOOK AND NEXT HORIZONS	70
3.6.1 STANDARDIZATION OF TOOLS, ACTIONS, AND POLICIES	71
3.6.2 MULTI-AGENT COORDINATION MATURITY	71
3.6.3 AUTONOMOUS OPERATIONS IN REGULATED ENVIRONMENTS	71
3.7 VENDOR LANDSCAPE AND MARKET TRENDS	72
4 PREMIUM INSIGHTS	76
4.1 ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN AI ORCHESTRATION MARKET	76
4.2 AI ORCHESTRATION MARKET, BY TOP THREE APPLICATIONS	76
4.3 NORTH AMERICA: AI ORCHESTRATION MARKET, BY DEPLOYMENT MODEL AND SOFTWARE	77
4.4 AI ORCHESTRATION MARKET, BY REGION	77
5 MARKET OVERVIEW AND INDUSTRY TRENDS	78
5.1 INTRODUCTION	78
5.2 MARKET DYNAMICS	78
5.2.1 DRIVERS	79
5.2.1.1 Enterprise shift from reactive chat to governed, outcome-linked automation	79
5.2.1.2 AI orchestration reducing cost-to-serve and time-to-resolution by executing system actions	80
5.2.1.3 Need for common governance layer across apps to centralize approvals, lineage, and policy enforcement	80
5.2.1.4 Stringent focus on regulatory compliance to push buyers toward governed AI orchestration	81
5.2.2 RESTRAINTS	81
5.2.2.1 Pricing complexity and cross-function budget splits stalling enterprise-wide commitments	81
5.2.2.2 Risk of unintended write-backs limiting autonomy and efficiency of AI orchestration tools	82
5.2.3 OPPORTUNITIES	82

5.2.3.1 Demand for sovereign and air-gapped AI orchestration in public sector and regulated industries	82
5.2.3.2 Replacement of overlapping RPA, iPaaS, and workflow stacks with AI orchestration suites	83
5.2.3.3 Prebuilt template libraries and certified action packs accelerating ROI cycles for mid-market	83
?	
5.2.4 CHALLENGES	84
5.2.4.1 Enterprise app sprawl across multi-cloud environments to cause vendor lock-in concerns	84
5.2.4.2 End-to-end observability across multi-agent orchestration to build complexity	84
5.3 EVOLUTION OF AI ORCHESTRATION	85
5.4 SUPPLY CHAIN ANALYSIS	87
5.5 ECOSYSTEM ANALYSIS	89
5.5.1 AGENT ORCHESTRATION PLATFORM PROVIDERS	91
5.5.2 AGENT BUILDER TOOL PROVIDERS	92
5.5.3 WORKFLOW ORCHESTRATION PROVIDERS	92
5.5.4 MODEL SERVING PLATFORM PROVIDERS	92
5.5.5 DATA ORCHESTRATION PROVIDERS	93
5.5.6 INFRASTRUCTURE ORCHESTRATION PROVIDERS	93
5.5.7 SERVICE PROVIDERS	93
5.6 IMPACT OF 2025 US TARIFF - AI ORCHESTRATION MARKET	94
5.6.1 INTRODUCTION	94
5.6.1.1 Tariff/Trade policy updates (Aug-Sep 2025)	95
5.6.2 KEY TARIFF RATES	95
5.6.3 PRICE IMPACT ANALYSIS	96
5.6.3.1 Strategic shifts and emerging trends	96
5.6.4 IMPACT ON COUNTRY/REGION	97
5.6.4.1 US	97
5.6.4.2 China	98
5.6.4.3 Europe	99
5.6.4.4 Asia Pacific (excluding China)	100
5.6.5 IMPACT ON END-USE INDUSTRIES	101
5.6.5.1 BFSI	101
5.6.5.2 Telecommunications	101
5.6.5.3 Government & public sector	102
5.6.5.4 Healthcare & life sciences	102
5.6.5.5 Manufacturing	102
5.6.5.6 Retail & e-commerce	103
5.6.5.7 Software & technology providers	103
5.7 INVESTMENT AND FUNDING SCENARIO	104
5.8 CASE STUDY ANALYSIS	105
5.8.1 BOOKING.COM SCALES AI TO 14,000 EMPLOYEES WITH GLEAN ASSISTANT	105
5.8.2 ASTRAZENECA ACCELERATES DRUG DISCOVERY WITH AMAZON BEDROCK AGENT ORCHESTRATION	105
5.8.3 TAMPA GENERAL HOSPITAL IMPROVES PATIENT FLOW WITH PALANTIR AIP	106
5.8.4 HOLLAND AMERICA LINE LAUNCHES "ANNA" WITH MICROSOFT COPILOT STUDIO	106
5.8.5 HERITAGE BANK STREAMLINES OPERATIONS WITH UIPATH AI-POWERED ORCHESTRATION	107
5.8.6 FANATICS CONSOLIDATES CX ORCHESTRATION ON GENESYS CLOUD AI	107
5.9 TECHNOLOGY ANALYSIS	108
5.9.1 KEY TECHNOLOGIES	108
5.9.1.1 Language model inference and routing	108

5.9.1.2 Embeddings and vector indexing	108
5.9.1.3 Ontologies and knowledge graphs	109
5.9.1.4 Policy-as-code	109
5.9.1.5 Function invocation semantics	109
5.9.2 COMPLEMENTARY TECHNOLOGIES	109
5.9.2.1 On-device/edge compute	109
5.9.2.2 Data quality and lineage	110
5.9.2.3 Chaos/resilience testing	110
5.9.2.4 Caching and optimization	110
5.9.3 ADJACENT TECHNOLOGIES	111
5.9.3.1 iPaaS and BPM engines	111
5.9.3.2 AIOps and observability	111
5.9.3.3 Data warehouse and feature stores	111
5.9.3.4 API management and service networking	112
5.10 REGULATORY LANDSCAPE	112
5.10.1 REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	112
5.10.2 REGULATIONS	115
5.10.2.1 North America	115
5.10.2.1.1 Executive Order 14110 on Safe, Secure, and Trustworthy AI (US)	115
5.10.2.1.2 Artificial Intelligence and Data Act-AIDA (Canada)	116
5.10.2.2 Europe	116
5.10.2.2.1 Europe Artificial Intelligence Act (European Union)	116
5.10.2.2.2 General Data Protection Regulation (European Union)	117
5.10.2.2.3 Data Protection Act 2018 (UK)	117
5.10.2.2.4 Federal Data Protection Act (Germany)	118
5.10.2.2.5 French Data Protection Act (France)	118
5.10.2.2.6 Personal Data Protection Code-Legislative Decree 196/2003 (Italy)	118
5.10.2.2.7 Organic Law 3/2018 (Spain)	119
5.10.2.2.8 UAVG and Public-sector Algorithm Transparency (Netherlands)	119
5.10.2.3 Asia Pacific	120
5.10.2.3.1 Interim Measures for the Management of Generative AI Services (China)	120
5.10.2.3.2 Digital Personal Data Protection Act, 2023 (India)	120
5.10.2.3.3 Act on the Protection of Personal Information (Japan)	121
5.10.2.3.4 Basic Act on Artificial Intelligence (South Korea)	122
5.10.2.3.5 Personal Data Protection Act (Singapore)	122
5.10.2.4 Middle East & Africa	123
5.10.2.4.1 Federal Decree-Law No. 45 of 2021 on the Protection of Personal Data (UAE)	123
5.10.2.4.2 Personal Data Protection Law (KSA)	123
5.10.2.4.3 Protection of Personal Information Act (South Africa)	124
5.10.2.4.4 Personal Data Privacy Protection Law (Qatar)	124
5.10.2.4.5 Law on the Protection of Personal Data No. 6698 (Turkey)	125
5.10.2.5 Latin America	125
5.10.2.5.1 General Data Protection Law - LGPD (Brazil)	125
5.10.2.5.2 Federal Law on Protection of Personal Data Held by Private Parties (Mexico)	126
5.10.2.5.3 Personal Data Protection Law No. 25,326 (Argentina)	126
5.11 PATENT ANALYSIS	127
5.11.1 METHODOLOGY	127

5.11.2 PATENTS FILED, BY DOCUMENT TYPE, 2016-2025	127
5.11.3 INNOVATION AND PATENT APPLICATIONS	127
5.12 PRICING ANALYSIS	130
5.12.1 AVERAGE SELLING PRICE OF OFFERINGS, BY KEY PLAYER, 2025	132
5.12.2 AVERAGE SELLING PRICE OF APPLICATIONS, 2025	133
5.13 KEY CONFERENCES AND EVENTS, 2025-2026	134
5.14 PORTER'S FIVE FORCES ANALYSIS	134
5.14.1 THREAT OF NEW ENTRANTS	135
5.14.2 THREAT OF SUBSTITUTES	136
5.14.3 BARGAINING POWER OF SUPPLIERS	136
5.14.4 BARGAINING POWER OF BUYERS	136
5.14.5 INTENSITY OF COMPETITION RIVALRY	137
5.15 KEY STAKEHOLDERS AND BUYING CRITERIA	137
5.15.1 KEY STAKEHOLDERS IN BUYING PROCESS	137
5.15.2 BUYING CRITERIA	138
5.16 TRENDS/DISRUPTIONS IMPACTING CUSTOMER BUSINESS	138
6 AI ORCHESTRATION MARKET, BY OFFERING	140
6.1 INTRODUCTION	141
6.1.1 DRIVERS: AI ORCHESTRATION MARKET, BY OFFERING	141
6.2 SOFTWARE	142
6.2.1 AI ORCHESTRATION PLATFORMS	144
6.2.1.1 Enforcing typed tools, approvals, and telemetry to convert pilots into enterprise-scale	144
6.2.2 AGENT BUILDER TOOLS	145
6.2.2.1 Leveraging schema-first catalogs and reusable plans to cut time to value	145
6.2.3 WORKFLOW ORCHESTRATION PLATFORMS	146
6.2.3.1 Expanding automation while preventing shadow processes	146
6.2.4 DATA ORCHESTRATION PLATFORMS	148
6.2.4.1 With lineage and quality gates, keeping agent decisions grounded in trusted, timely data	148
6.2.5 MODEL SERVING PLATFORMS	149
6.2.5.1 Balancing latency, quality, and spend through monitored, cost-aware endpoints	149
6.2.6 INFRASTRUCTURE ORCHESTRATION PLATFORMS	150
6.2.6.1 Rightsizing GPU capacity and delivering reliable hybrid scaling	150
6.3 SERVICES	151
6.3.1 PROFESSIONAL SERVICES	153
6.3.1.1 Training & consulting services	154
6.3.1.1.1 Cross-functional enablement to accelerate adoption of live workflows	154
6.3.1.2 System integration & implementation services	155
6.3.1.2.1 Wiring agents to systems of record with identity, connectors, and rollback paths	155
6.3.1.3 Support & maintenance services	156
6.3.1.3.1 Adding orchestration-aware monitoring to improve orchestration reliability	156
6.3.2 MANAGED SERVICES	157
6.3.2.1 Implementing orchestration with embedded governance, cost control, and SLA-backed uptime	157
7 AI ORCHESTRATION MARKET, BY ORCHESTRATION ARCHITECTURE	159
7.1 INTRODUCTION	160
7.1.1 DRIVERS: AI ORCHESTRATION MARKET, BY ORCHESTRATION ARCHITECTURE	160
7.2 CENTRALIZED ORCHESTRATION	161
7.2.1 CONCENTRATES POLICY AND EVIDENCE TO SCALE CONTROL WITH CLARITY	161

7.3 DECENTRALIZED ORCHESTRATION	162
7.3.1 MULTI-TENANT SAAS DELIVERS QUICKEST PATH FROM PILOT TO MEASURABLE OUTCOMES	162
7.4 DISTRIBUTED ORCHESTRATION	163
7.4.1 OPTIMIZES RESILIENCE AND LOCALITY ACROSS MULTIPLE RUNTIMES	163
7.5 HYBRID ORCHESTRATION	164
7.5.1 ROUTES WORK BY RISK AND PERFORMANCE WHILE PRESERVING CONSISTENT POLICY	164
8 AI ORCHESTRATION MARKET, BY DEPLOYMENT MODEL	166
8.1 INTRODUCTION	167
8.1.1 DRIVERS: AI ORCHESTRATION MARKET, BY DEPLOYMENT MODEL	167
8.2 SINGLE TENANT SAAS	168
8.2.1 BALANCING ISOLATION AND AGILITY WITH PROVIDER MANAGED OPERATIONS	168
8.3 MULTI-TENANT SAAS	169
8.3.1 DELIVERING QUICKEST PATH FROM PILOT TO MEASURABLE OUTCOMES	169
8.4 CUSTOMER MANAGED CLOUD	170
8.4.1 MAXIMIZING SOVEREIGNTY AND COST GOVERNANCE WITHIN CUSTOMER SUBSCRIPTIONS	170
8.5 ON-PREMISES & AIR-GAPPED	171
8.5.1 ADDRESSING HIGHEST BARS FOR ISOLATION AND LOCALITY	171
9 AI ORCHESTRATION MARKET, BY APPLICATION	173
9.1 INTRODUCTION	174
9.1.1 DRIVERS: AI ORCHESTRATION MARKET, BY APPLICATION	174
9.2 CUSTOMER SERVICE AUTOMATION	176
9.2.1 TURNING INTENT INTO FIRST-CONTACT RESOLUTION WITH GOVERNED WRITE-BACKS	176
9.3 SALES & REVENUE AUTOMATION	177
9.3.1 SEQUENCING APPROVALS AND UPDATES FOR PIPELINES TO MOVE WITH FEWER STALLS	177
9.4 MARKETING AUTOMATION	178
9.4.1 ORCHESTRATING COMPLIANT CAMPAIGNS WITH SHARED GUARDRAILS AND REUSABLE PLAYBOOKS	178
9.5 IT SERVICE MANAGEMENT	180
9.5.1 CONVERTING TICKETS INTO GOVERNED ACTIONS WITH REPEATABLE AGENT HANDOFFS	180
9.6 SECURITY OPERATIONS	181
9.6.1 USING POLICY BOUND ORCHESTRATIONS TO REDUCE DWELL TIME AND FALSE POSITIVES	181
9.7 FINANCE & PROCUREMENT AUTOMATION	182
9.7.1 ENFORCING SEPARATION OF DUTIES WHILE ACCELERATING CLOSE AND PAY CYCLES	182
9.8 SUPPLY CHAIN AUTOMATION	183
9.8.1 SYNCHRONIZING PLAN, SOURCE, MAKE, AND DELIVERY WITH GOVERNED CORRECTIVE ACTIONS	183
9.9 HR & EMPLOYEE SERVICE DESK	184
9.9.1 STREAMLINING REQUESTS AND CHANGES WITH ROLE-AWARE APPROVALS	184
9.10 ENTERPRISE KNOWLEDGE SEARCH	185
9.10.1 PAIRING RETRIEVAL WITH ACTION SO ANSWERS BECOME COMPLETED TASKS	185
9.11 SOFTWARE ENGINEERING & CODING AUTOMATION	186
9.11.1 ACCELERATING DELIVERY WHILE SAFEGUARDING CODE AND CHANGE CONTROL	186
9.12 FIELD SERVICE & ASSET OPERATIONS	187
9.12.1 COORDINATING SCHEDULING, PARTS, AND WORK ORDERS UNDER ONE GOVERNED RUN	187
9.13 OTHER APPLICATIONS	188
10 AI ORCHESTRATION MARKET, BY END USER	190
10.1 INTRODUCTION	191
10.1.1 DRIVERS: AI ORCHESTRATION MARKET, BY END USER	191
10.2 BFSI	193

10.2.1] TARGETING EXCEPTION-HEAVY JOURNEYS WITH ORCHESTRATIONS THAT PROVE CONTROL AND SHORTEN CYCLE TIME]193
10.3] RETAIL & CPG]194
10.3.1] FOCUSING ON FULFILLMENT RELIABILITY, MARGIN DISCIPLINE, AND CUSTOMER MOMENTS THAT CONVERT]194
10.4] PROFESSIONAL SERVICE PROVIDERS]195
10.4.1] PRODUCTIZING DELIVERY WITH REUSABLE PLAYBOOKS AND CLIENT-GRADE EVIDENCE]195
10.5] HEALTHCARE & LIFE SCIENCES]196
10.5.1] SEEKING SAFER THROUGHPUT IN PATIENT AND STUDY WORKFLOWS WITH PRIVACY-FIRST CONTROLS]196
10.6] TELECOMMUNICATIONS]198
10.6.1] PRIORITIZING ASSURANCE AND SERVICE CHANGES WHERE UPTIME AND TENURE ARE AT STAKE]198
10.7] SOFTWARE & TECHNOLOGY PROVIDERS]199
10.7.1] LEVERAGING AI ORCHESTRATION TO SCALE CUSTOMER OPERATIONS WITH EMBEDDED GUARDRAILS]199
10.8] MEDIA & ENTERTAINMENT]200
10.8.1] ORCHESTRATING SUPPLY CHAINS OF CONTENT, RIGHTS, AND PERSONALIZATION AT INDUSTRIAL SCALE]200
10.9] LOGISTICS & TRANSPORTATION]201
10.9.1] COMPRESSING LEAD, MOVE, AND DELIVER CYCLES WITH GOVERNED CORRECTIVE ACTIONS]201
10.10] GOVERNMENT & DEFENSE]203
10.10.1] PRIORITIZING MISSION ASSURANCE WITH AUDITABLE, POLICY-BOUND ORCHESTRATION]203
10.11] AUTOMOTIVE]204
10.11.1] TURNING ENGINEERING AND SERVICE WORKFLOWS INTO CLOSED LOOPS THAT PROTECT SAFETY AND MARGIN]204
10.12] ENERGY & UTILITIES]205
10.12.1] COORDINATING GRID AND ASSET DECISIONS WITH SAFETY, LOCALITY, AND EVIDENCE FRONT AND CENTER]205
10.13] MANUFACTURING]206
10.13.1] SCALING CONTINUOUS IMPROVEMENT BY WIRING DECISIONS TO GOVERNED ACTIONS ON SHOP FLOOR]206
10.14] OTHER END USERS]207
?
11] AI ORCHESTRATION MARKET, BY REGION]209
11.1] INTRODUCTION]210
11.2] NORTH AMERICA]212
11.2.1] NORTH AMERICA: AI ORCHESTRATION MARKET DRIVERS]212
11.2.2] NORTH AMERICA: MACROECONOMIC OUTLOOK]212
11.2.3] US]219
11.2.3.1] Consolidation from scattered copilots to governed control planes delivering closed-loop actions with auditable KPIs]219
11.2.4] CANADA]225
11.2.4.1] Sovereign cloud options and SI-led domain accelerators fast-tracking compliant orchestration in telecom and public sectors]225
11.3] EUROPE]230
11.3.1] EUROPE: AI ORCHESTRATION MARKET DRIVERS]230
11.3.2] EUROPE: MACROECONOMIC OUTLOOK]231
11.3.3] UK]237
11.3.3.1] Heavy investment in AI infrastructure and enterprise buyers standardizing action catalogs across finance and public services]237
11.3.4] GERMANY]243
11.3.4.1] IT-OT convergence in manufacturing that requires typed tools, strict approvals, and measurable plant productivity gains]243
11.3.5] FRANCE]249
11.3.5.1] Customer, finance, and network operations pushing for lineage-rich orchestration hosted on compliant European clouds]249

11.3.6 **ITALY** 254

11.3.6.1 **Industrial modernization in automotive and utilities driving shopfloor-to-enterprise runbooks and quality-assured execution** 254

11.3.7 **SPAIN** 260

11.3.7.1 **Telco and banking programs scaling closed-loop CX and finance workflows across APIs and legacy interfaces** 260

11.3.8 **NETHERLANDS** 266

11.3.8.1 **Banking, logistics, and ports demanding KPI-tied orchestration for fraud, exception handling, and field coordination** 266

11.3.9 **REST OF EUROPE** 272

11.4 **ASIA PACIFIC** 278

11.4.1 **ASIA PACIFIC: AI ORCHESTRATION MARKET DRIVERS** 279

11.4.2 **ASIA PACIFIC: MACROECONOMIC OUTLOOK** 279

11.4.3 **CHINA** 286

11.4.3.1 **Sovereign AI programs and domestic cloud ecosystems embedding orchestration into large-scale industrial and public workloads** 286

11.4.4 **INDIA** 292

11.4.4.1 **Global SI adoption and exportable blueprints turning orchestration into core layer for managed services and BFSI** 292

11.4.5 **JAPAN** 298

11.4.5.1 **Precision manufacturing and regulated finance requiring hybrid orchestration with deep connector quality and auditability** 298

11.4.6 **SOUTH KOREA** 304

11.4.6.1 **Telco-centric ecosystems combining AI, 5G, and edge to operationalize multi-agent workflows at scale** 304

11.4.7 **SINGAPORE** 310

11.4.7.1 **Regional hub economics with banks, logistics, and e-government utilizing orchestration for fast, measurable outcomes** 310

11.4.8 **AUSTRALIA & NEW ZEALAND (ANZ)** 316

11.4.8.1 **Public services, banking, and mining standardizing runbooks on sovereign and hybrid control planes** 316

11.4.9 **REST OF ASIA PACIFIC** 321

11.5 **MIDDLE EAST & AFRICA** 327

11.5.1 **MIDDLE EAST & AFRICA: AI ORCHESTRATION MARKET DRIVERS** 327

11.5.2 **MIDDLE EAST & AFRICA: MACROECONOMIC OUTLOOK** 327

11.5.3 **SAUDI ARABIA** 334

11.5.3.1 **Vision-scale programs funding multi-domain orchestration with clear KPI ownership across government and energy** 334

11.5.4 **UAE** 340

11.5.4.1 **Rapid pilot-to-production cycles in aviation, government, and finance favoring transparent, action-metered platforms** 340

11.5.5 **SOUTH AFRICA** 346

11.5.5.1 **Modernization of banking, telco, and mining stacks that need governed handoffs between IT, field, and compliance** 346

11.5.6 **TURKEY** 351

11.5.6.1 **Export-oriented manufacturers and banks adopting orchestration to unify ERP, MES, PLM, and customer operations** 351

11.5.7 **QATAR** 357

11.5.7.1 **Smart city, energy, and aviation programs institutionalizing approvals, lineage, and closed-loop service delivery** 357

11.5.8 **REST OF MIDDLE EAST & AFRICA** 363

11.6 **LATIN AMERICA** 369

11.6.1 **LATIN AMERICA: AI ORCHESTRATION MARKET DRIVERS** 370

11.6.2 **LATIN AMERICA: MACROECONOMIC OUTLOOK** 370

11.6.3 **BRAZIL** 376

11.6.3.1 **Large banks, retailers, and telcos demanding auditable execution that reduces backlog and improves resolution time** 376

11.6.4 **MEXICO** 382

11.6.4.1 **Nearshoring and cross-border logistics driving governed exception handling across ERP, customs, and warehouse**

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systems]382

11.6.5]ARGENTINA]388

11.6.5.1]Financial services and utilities seeking predictable service quality through standardized approvals and measurable outcomes]388

11.6.6]REST OF LATIN AMERICA]394

?

12]COMPETITIVE LANDSCAPE]401

12.1]OVERVIEW]401

12.2]KEY PLAYER STRATEGIES, 2020-2025]401

12.3]REVENUE ANALYSIS, 2020-2024]403

12.4]MARKET SHARE ANALYSIS, 2024]405

12.5]BRAND/PRODUCT COMPARISON]409

12.5.1]PRODUCT COMPARATIVE ANALYSIS, BY AGENT ORCHESTRATION PLATFORMS]409

12.5.1.1]Palantir (AIP + Foundry)]409

12.5.1.2]Microsoft (Copilot Studio + Azure AI Studio)]409

12.5.1.3]IBM (watsonx Orchestrate + watsonx.ai)]409

12.5.1.4]Google (Vertex AI Agents)]410

12.5.1.5]Glean (Search + Assistant + Agents)]410

12.5.2]PRODUCT COMPARATIVE ANALYSIS, BY AGENT BUILDER TOOLS]410

12.5.2.1]Kore.ai (AI for Work)]411

12.5.2.2]Aisera AI (Copilot Platform)]411

12.5.2.3]Teneo.ai (Teneo Platform)]411

12.5.2.4]Yellow.ai (DAP Platform)]411

12.5.2.5]Genesys (Genesys Cloud CX)]411

12.5.3]PRODUCT COMPARATIVE ANALYSIS, BY WORKFLOW ORCHESTRATION PLATFORMS]412

12.5.3.1]Appian (AI Process Platform)]412

12.5.3.2]UiPath (Business Automation Platform)]412

12.5.3.3]ServiceNow (Now Platform)]412

12.5.3.4]Workato (Automation Platform)]413

12.5.3.5]SnapLogic (Intelligent Integration Platform)]413

12.6]COMPANY VALUATION AND FINANCIAL METRICS OF KEY VENDORS]413

12.7]COMPANY EVALUATION MATRIX: KEY PLAYERS, 2024]414

12.7.1]STARS]414

12.7.2]EMERGING LEADERS]414

12.7.3]PERVASIVE PLAYERS]414

12.7.4]PARTICIPANTS]415

12.7.5]COMPANY FOOTPRINT: KEY PLAYERS, 2024]416

12.7.5.1]Company footprint]416

12.7.5.2]Regional footprint]417

12.7.5.3]Offering footprint]418

12.7.5.4]Deployment model footprint]419

12.7.5.5]Application footprint]420

12.7.5.6]End user footprint]421

12.8]COMPANY EVALUATION MATRIX: STARTUPS/SMES, 2024]422

12.8.1]PROGRESSIVE COMPANIES]422

12.8.2]RESPONSIVE COMPANIES]422

12.8.3]DYNAMIC COMPANIES]422

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12.8.4 STARTING BLOCKS 422  
12.8.5 COMPETITIVE BENCHMARKING: STARTUPS/SMES 424  
12.8.5.1 Detailed list of key startups/SMEs 424  
12.8.5.2 Competitive benchmarking of key startups/SMEs 425  
12.9 COMPETITIVE SCENARIO 426  
12.9.1 PRODUCT LAUNCHES AND ENHANCEMENTS 426  
12.9.2 DEALS 430  
13 COMPANY PROFILES 435  
13.1 INTRODUCTION 435  
13.2 KEY PLAYERS 435  
13.2.1 IBM 435  
13.2.1.1 Business overview 435  
13.2.1.2 Products/Solutions/Services offered 436  
13.2.1.3 Recent developments 437  
13.2.1.3.1 Product launches and enhancements 437  
13.2.1.3.2 Deals 437  
13.2.1.4 MnM view 438  
13.2.1.4.1 Key strengths 438  
13.2.1.4.2 Strategic choices 438  
13.2.1.4.3 Weaknesses and competitive threats 438  
13.2.2 AMAZON WEB SERVICES 439  
13.2.2.1 Business overview 439  
13.2.2.2 Products/Solutions/Services offered 440  
13.2.2.3 Recent developments 440  
13.2.2.3.1 Product launches and enhancements 440  
13.2.2.3.2 Deals 441  
13.2.2.4 MnM view 441  
13.2.2.4.1 Key strengths 441  
13.2.2.4.2 Strategic choices 442  
13.2.2.4.3 Weaknesses and competitive threats 442  
13.2.3 SALESFORCE 443  
13.2.3.1 Business overview 443  
13.2.3.2 Products/Solutions/Services offered 444  
13.2.3.3 Recent developments 445  
13.2.3.3.1 Product launches and enhancements 445  
13.2.3.3.2 Deals 446  
13.2.3.4 MnM view 447  
13.2.3.4.1 Key strengths 447  
13.2.3.4.2 Strategic choices 447  
13.2.3.4.3 Weaknesses and competitive threats 447  
?  
13.2.4 ADOBE 448  
13.2.4.1 Business overview 448  
13.2.4.2 Products/Solutions/Services offered 449  
13.2.4.3 Recent developments 450  
13.2.4.3.1 Product launches and enhancements 450  
13.2.4.3.2 Deals 450

13.2.4.4 MnM view 450  
13.2.4.4.1 Key strengths 450  
13.2.4.4.2 Strategic choices 451  
13.2.4.4.3 Weaknesses and competitive threats 451  
13.2.5 MICROSOFT 452  
13.2.5.1 Business overview 452  
13.2.5.2 Products/Solutions/Services offered 453  
13.2.5.3 Recent developments 454  
13.2.5.3.1 Product launches and enhancements 454  
13.2.5.3.2 Deals 454  
13.2.5.4 MnM view 455  
13.2.5.4.1 Key strengths 455  
13.2.5.4.2 Strategic choices 455  
13.2.5.4.3 Weaknesses and competitive threats 455  
13.2.6 SAP 456  
13.2.6.1 Business overview 456  
13.2.6.2 Products/Solutions/Services offered 457  
13.2.6.3 Recent developments 458  
13.2.6.3.1 Product launches and enhancements 458  
13.2.6.3.2 Deals 458  
13.2.7 GOOGLE 459  
13.2.7.1 Business overview 459  
13.2.7.2 Products/Solutions/Services offered 460  
13.2.7.3 Recent developments 461  
13.2.7.3.1 Product launches and enhancements 461  
13.2.7.3.2 Deals 461  
13.2.8 COFORGE 462  
13.2.8.1 Business overview 462  
13.2.8.2 Products/Solutions/Services offered 463  
13.2.8.3 Recent developments 463  
13.2.8.3.1 Product launches and enhancements 463  
13.2.8.3.2 Deals 464  
13.2.9 SERVICENOW 465  
13.2.9.1 Business overview 465  
13.2.9.2 Products/Solutions/Services offered 466  
13.2.9.3 Recent developments 467  
13.2.9.3.1 Product launches and enhancements 467  
13.2.9.3.2 Deals 467  
13.2.10 UIPATH 469  
13.2.10.1 Business overview 469  
13.2.10.2 Products/Solutions/Services offered 470  
13.2.10.3 Recent developments 471  
13.2.10.3.1 Product launches and enhancements 471  
13.2.10.3.2 Deals 471  
13.2.11 NVIDIA 472  
13.2.12 LIVEPERSON 473  
13.2.13 GENESYS 474

13.2.14	PALANTIR	475
13.2.15	KORE.AI	476
13.2.16	ALTAIR	477
13.2.17	YELLOW.AI	478
13.2.18	GLEAN	479
13.2.19	DIGITAL.AI	480
13.2.20	WORKATO	481
13.2.21	APPIAN	482
13.3	OTHER PLAYERS	483
13.3.1	SOLACE	483
13.3.2	JITTERBIT	484
13.3.3	SNAPLOGIC	485
13.3.4	AISERA	486
13.3.5	ONERACH.AI	487
13.3.6	DOMINO DATA LABS	488
13.3.7	ANYSCALE	489
13.3.8	FORETHOUGHT.AI	490
13.3.9	VUE.AI (MAD STREET DEN)	491
13.3.10	RAFAY SYSTEMS	492
13.3.11	SPACELIFT.IO	493
13.3.12	AIRIA	494
13.3.13	DAGSTER LABS	495
13.3.14	HUMANITEC	496
13.3.15	TONKEAN	497
13.3.16	AKKA.IO	498
13.3.17	SPARKBEYOND	499
13.3.18	UNION.AI	500
13.3.19	ORKES	501
13.3.20	TENEO.AI	502
13.3.21	ORBY AI (UNIPHORE)	503
13.3.22	MULTIMODAL.DEV	504
13.3.23	HOPSWORKS	505
14	ADJACENT AND RELATED MARKETS	506
14.1	INTRODUCTION	506
14.2	AGENTIC AI MARKET - GLOBAL FORECAST TO 2032	506
14.2.1	MARKET DEFINITION	506
14.2.2	MARKET OVERVIEW	506
14.2.2.1	Agentic AI market, by offering	507
14.2.2.2	Agentic AI market, by horizontal use case	507
14.2.2.3	Agentic AI market, by end user	508
14.2.2.4	Agentic AI market, by region	509
14.3	AI PLATFORM MARKET - GLOBAL FORECAST TO 2030	510
14.3.1	MARKET DEFINITION	510
14.3.2	MARKET OVERVIEW	510
14.3.2.1	AI platform market, by offering	511
14.3.2.2	AI platform market, by functionality	511
14.3.2.3	AI platform market, by user type	512

14.3.2.4 AI platform market, by end user 513

14.3.2.5 AI platform market, by region 514

15 APPENDIX 516

15.1 DISCUSSION GUIDE 516

15.2 KNOWLEDGESTORE: MARKETSANDMARKETS' SUBSCRIPTION PORTAL 522

15.3 CUSTOMIZATION OPTIONS 524

15.4 RELATED REPORTS 524

15.5 AUTHOR DETAILS 525

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