

# Cloud Services Brokerage Market by Service Type (Integration & Support, Migration & Customization, and Automation & Orchestration), Platform, Deployment Model, Organization Size, Vertical, and Region, - Global Forecast to 2025

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## Abstracts

The global CSB market size is expected to grow from USD 5.9 billion in 2020 to USD 12.9 billion by 2025, at a Compound Annual Growth Rate (CAGR) of 16.8% during the forecast period. COVID-19 has globally changed the dynamics of business operations. Though the COVID-19 outbreak has thrown light on weaknesses in business models across sectors, it has offered several opportunities to CSB vendors to expand their business across enterprises as the adoption of cloud has increased in lockdown caused due to COVID-19. Amidst lockdown, many companies are reducing their IT spending in 2020. They are strategically reconsidering their Capital Expenditure (CAPEX) spending. According to one of the primary respondents, companies are showing a keen interest in investing in CAPEX models if they are persistently needed; otherwise, they are opting for Operating Expenditure (OPEX) models. To achieve these strategies and avoid capital spending in these difficult financial times, organizations are moving to public cloud for backup and CSB.

Migration and customization services to help enterprises in achieving flexibility in business operations

Cloud migration services have gained popularity as enterprises across the globe continue to migrate workloads from on-premises infrastructure to cloud environments for better operational efficiency and cost savings. The demand for cloud services has surged in recent times due to COVID-19, and many enterprises across the regions have shifted enterprise workloads on cloud environment. Therefore, CSB vendors

specializing in migration and customization services are in high demand. Cloud brokers offer customization services to the customers as per business needs, which provides better-bundled offerings facilitating higher returns on cloud investments.

Retail and consumer goods vertical to grow at the highest rate during the forecast period

The retail and consumer goods vertical is witnessing a significant transformation due to consumers' rising purchasing power, the availability of digital stores, and enhanced customer experience with the emergence of new-generation offerings for retailers. With the proliferation of the online market, retailers are adopting innovative technologies, such as cloud computing, big data analytics, digital stores, and social media networks. These advancements further invite greater employment in this sector and an increased amount of customer data to exploit. With the advent of eCommerce and online retailers, the retail industry has faced tremendous changes in recent years and has readjusted itself to the new business environment. Shop retailers are adopting more innovative technologies, such as cloud computing and big data analytics, to survive and thrive. Vendors need a comprehensive cloud-computing environment to offer their respective product and service portfolios to customers. Managing the instability and change in demand for various products due to strong competition is a definite challenge. Shop retailers are adopting cloud services brokerage to manage cloud environments, cross-channel shipping options, and inventory to sustain tough competition.

North America to hold the largest market size and Asia Pacific (APAC) to grow at the highest rate during the forecast period

North America is the most mature market in terms of CSB solutions adoption, due to several factors, such as the presence of many enterprises with advanced IT infrastructure, and availability of technical expertise. APAC is expected to offer significant growth opportunities for CSB solutions vendors during the forecast period. Rapid advancements in emerging technologies, IT infrastructure services, and the Internet of Things (IoT) have led many organizations to adopt CSB solutions.

In the process of determining and verifying the market size for several segments and subsegments gathered through secondary research, extensive primary interviews were conducted with the key people. The breakup of the profiles of the primary participants as follows:

By Company Type: Tier I: 37%, Tier II: 34%, and Tier III: 25%

By Designation: C-Level: 31%, D-Level: 34%, and Others: 35%

By Region: North America: 46%, Europe: 28%, APAC: 18%, and RoW: 8%

**The report profiles the following key vendors:**

1. Accenture (Ireland)
2. IBM (US)
3. VMware (US)
4. Jamcracker (US)
5. ActivePlatform (Belarus)
6. Arrow Electronics (US)
7. Cloudmore (Sweden)
8. Wipro (India)
9. DXC Technology (US)
10. iPortalis (UK)
11. Cognizant (US)
12. InContinuum (Netherlands)
13. Flexera (US)
14. BitTitan (US)
15. OpenText (Canada)
16. CloudFX (Singapore)
17. Proximitum (UK)
18. Eshgro (Netherlands)
19. NEC (Japan)
20. AWS (US)
21. CloudSME (Germany)
22. Shivaami (India)
23. NTT Data (US)
24. Infosys (India)
25. TCS (India)
26. Pax8 (US)
27. Oracle (US)
28. Fujitsu (Japan)
29. Microsoft (US)
30. Capgemini (France)
31. Doublehorn (US)

## Research Coverage

The report segments the global CSB market by service type, the CSB market has been segmented into integration and support, automation and orchestration, billing and provisioning, migration and customization, security and compliance and other services. By platform, the CSB market has been segmented into internal brokerage enablement and external brokerage enablement. By the deployment model, the CSB market has been segmented into public cloud and private cloud. Based on organization size, the market has been classified into Small and Medium-sized Enterprises (SMEs) and large enterprises. By vertical, the CSB market has been classified into Banking, Financial Services and Insurance (BFSI); telecommunications; IT and Information Technology-enabled Services (ITeS); government and public sector; retail and consumer goods; manufacturing; energy and utilities; media and entertainment; healthcare and life sciences; and others (education, travel and hospitality, and transportation and logistics). By region, the market has been segmented into North America, Europe, APAC, MEA, and Latin America.

## Key Benefits of Buying the Report

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

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\*Details on Business overview, Products offered, Platforms and services offered, Recent developments & MnM View might not be captured in case of unlisted companies.

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