

Open Banking Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Financial Services (Banking & Capital Markets, Payments, Digital Currencies, Value Added Services), By Distribution Channel (Bank Channel, App Market, Distributors, Aggregators), By Region, By Competition 2019-2029

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Abstracts

The Global Open Banking Market was valued at USD 22.54 Billion in 2023 and is anticipated to grow with a CAGR of 27.9% through 2029. The Global Open Banking Market is experiencing a significant surge, driven by the growing demand for enhanced financial services, technological advancements, and regulatory initiatives promoting financial transparency. Open banking refers to a system where financial institutions open up their data and services to third-party providers through APIs (Application Programming Interfaces). This approach fosters innovation by allowing external developers to create new applications and services that leverage financial data. The market is witnessing a paradigm shift in consumer behavior, with individuals seeking more personalized and convenient banking solutions. Open banking facilitates seamless integration of various financial products and services, empowering consumers with a holistic view of their financial landscape.

Moreover, the rise of FinTech firms and technology giants entering the financial services sector is intensifying competition and prompting traditional banks to embrace open banking models. As a result, the market is experiencing collaborations, partnerships, and mergers to harness synergies between financial institutions and technology innovators. The adoption of open banking is also gaining momentum due to regulatory initiatives, such as the Revised Payment Service Directive (PSD2) in Europe, which

mandates banks to open up access to customer account information and payment services. With a projected compound annual growth rate (CAGR) in the double digits, the Global Open Banking Market is poised for continued expansion, reshaping the financial services landscape on a global scale.

Market Drivers

Regulatory Initiatives and Compliance Requirements

One of the primary drivers fueling the growth of the Global Open Banking Market is the surge in regulatory initiatives and compliance requirements. Governments and financial regulatory bodies across the globe are recognizing the potential benefits of open banking in fostering competition, innovation, and financial inclusion. Notably, the Revised Payment Service Directive (PSD2) in Europe has played a pivotal role in shaping the open banking landscape. PSD2 mandates banks to open up access to customer account information and payment services, promoting the development of a more interconnected and competitive financial ecosystem. The regulatory push towards greater transparency and consumer empowerment is compelling financial institutions to adopt open banking frameworks to ensure compliance with evolving regulatory standards.

Technological Advancements and API Integration

The second key driver of the Global Open Banking Market is the rapid advancement in technology, particularly the widespread adoption of Application Programming Interfaces (APIs). APIs act as the backbone of open banking, facilitating the seamless exchange of data and services between financial institutions and third-party providers. The use of APIs enables secure and standardized communication, allowing different systems to interact and share information in real-time. As financial institutions embrace digital transformation, the integration of APIs becomes essential for enabling open banking functionalities. This technological evolution not only enhances the efficiency of banking operations but also fosters a collaborative ecosystem where innovative FinTech firms can develop and deliver tailored financial solutions. The rise of cloud computing, artificial intelligence, and blockchain further accelerates the integration of advanced technologies within the open banking framework, providing a robust foundation for the development of innovative financial services.

Changing Consumer Behavior and Expectations

The third driver shaping the Global Open Banking Market is the evolving behavior and expectations of consumers. Modern consumers are increasingly seeking personalized, convenient, and digitally-driven banking experiences. Open banking addresses these demands by empowering individuals with greater control over their financial data and enabling them to access a wider array of financial products and services. Through open banking platforms, consumers can aggregate their financial information from various sources, gaining a holistic view of their financial health. This transparency not only enhances financial literacy but also allows consumers to make more informed decisions about their money. Moreover, the demand for seamless and integrated financial services has been further amplified by the rise of digital-native generations, such as millennials and Generation Z, who prioritize technology-driven solutions and expect a high level of customization in their banking experiences.

Emergence of FinTech and Non-Banking Players

The fourth driver fueling the growth of the Global Open Banking Market is the emergence and proliferation of FinTech companies and non-banking players. Traditional financial institutions are facing increased competition from agile and innovative FinTech firms that leverage open banking frameworks to deliver innovative solutions. These FinTech companies often specialize in niche areas such as payments, lending, wealth management, or financial analytics, offering products that are more tailored to specific consumer needs. The entry of technology giants into the financial services sector further intensifies competition and accelerates the adoption of open banking models. Partnerships, collaborations, and strategic alliances between traditional banks and FinTech players are becoming commonplace as financial institutions seek to harness the expertise and agility of these non-banking entities to enhance their service offerings.

Globalization and Cross-Border Transactions

The fifth driver influencing the Global Open Banking Market is the increasing globalization of financial services and the growing demand for efficient cross-border transactions. Open banking facilitates secure data sharing and interoperability, enabling seamless financial transactions across borders. As businesses and individuals engage in international trade and investment, the need for frictionless cross-border payments and financial services becomes paramount. Open banking frameworks streamline these processes by allowing different financial institutions to collaborate and share relevant information, reducing the complexity and costs associated with cross-border transactions. Additionally, the globalization of financial services is leading to increased

collaboration between financial institutions from different regions, driving the standardization of open banking practices on a global scale. This trend is not only fostering financial inclusivity but also contributing to the development of a more interconnected and interoperable global financial ecosystem.

In conclusion, the Global Open Banking Market is propelled by a combination of regulatory mandates, technological advancements, changing consumer preferences, the emergence of FinTech players, and the increasing globalization of financial services. These drivers collectively contribute to the reshaping of the traditional banking landscape, fostering a more dynamic, transparent, and collaborative financial ecosystem. As the market continues to evolve, it is crucial for financial institutions to adapt to these drivers, leveraging open banking strategies to stay competitive, meet regulatory requirements, and deliver innovative and personalized financial services to an increasingly demanding and tech-savvy consumer base.

Key Market Challenges

Security and Data Privacy Concerns

One of the foremost challenges facing the Global Open Banking Market is the pervasive concern regarding security and data privacy. The very nature of open banking, which involves the sharing of financial data across multiple entities through APIs, raises apprehensions among consumers and regulators alike. The increased connectivity and data exchange create potential vulnerabilities that could be exploited by malicious actors if proper security measures are not in place. Cybersecurity threats, including data breaches, identity theft, and fraudulent activities, pose significant risks to the integrity of open banking systems. As financial institutions open their APIs to third-party providers, ensuring robust security protocols becomes imperative to safeguard sensitive customer information.

Addressing these challenges requires the implementation of advanced cybersecurity measures, encryption techniques, and continuous monitoring of data transactions. Additionally, compliance with data protection regulations, such as the General Data Protection Regulation (GDPR) in Europe, becomes crucial. Striking a balance between enabling seamless data sharing and safeguarding customer privacy is an ongoing challenge that the open banking industry must navigate to build and maintain trust among consumers and regulatory authorities.

Standardization and Interoperability

Another critical challenge in the Global Open Banking Market is the lack of standardized practices and interoperability across different regions and financial institutions. While open banking is gaining traction globally, there is no universal standard for implementing open banking frameworks. Each region and even individual financial institutions may have their own set of APIs, data-sharing protocols, and security measures. This lack of standardization complicates the development and integration of open banking solutions, hindering the seamless exchange of financial information.

To address this challenge, global collaboration and efforts towards standardization are essential. Industry bodies, regulators, and financial institutions must work together to establish common standards for APIs, data formats, and security protocols. Achieving interoperability not only enhances the efficiency of open banking but also facilitates cross-border transactions and encourages the development of innovative, globally accessible financial services.

Resistance from Traditional Banking Institutions

Traditional banking institutions face a significant challenge in adapting to the open banking paradigm. The existing legacy systems, infrastructure, and organizational cultures of many traditional banks may not be inherently compatible with the principles of open banking. Resistance to change, fear of losing control over customer relationships, and concerns about revenue streams are common barriers hindering the adoption of open banking within traditional banking organizations.

To overcome this challenge, banks must invest in modernizing their legacy systems, fostering a culture of innovation, and embracing collaboration with FinTech firms and other third-party providers. Strategic partnerships can help traditional banks leverage the agility and technology expertise of external entities to enhance their service offerings and remain competitive in an evolving financial landscape.

Regulatory Complexity and Compliance Burden

The regulatory landscape surrounding open banking is complex and constantly evolving. Financial institutions must navigate a myriad of regulations, including data protection laws, anti-money laundering (AML) regulations, and consumer protection laws, to ensure compliance. The diversity of regulatory approaches in different jurisdictions adds an additional layer of complexity, making it challenging for banks to implement open banking solutions that meet varying compliance requirements.

To address this challenge, there is a need for harmonization of regulatory frameworks globally. Standardizing regulatory approaches would streamline compliance efforts for financial institutions operating in multiple regions. Additionally, proactive engagement with regulatory authorities and participation in industry forums can help banks stay informed about regulatory developments and contribute to the formulation of balanced and effective open banking regulations.

Trust and Consumer Adoption

Building trust among consumers is a crucial challenge for the Global Open Banking Market. Many consumers remain skeptical about sharing their financial data with third-party providers, fearing the potential misuse or unauthorized access to sensitive information. Building trust requires a concerted effort from financial institutions, regulators, and industry stakeholders to educate consumers about the benefits of open banking, the security measures in place, and their rights regarding data protection.

Financial institutions must prioritize transparent communication regarding data usage, security protocols, and the value proposition of open banking services. Implementing robust authentication mechanisms, consent management tools, and effective dispute resolution processes are essential to instill confidence in consumers. Additionally, ongoing efforts to enhance financial literacy and raise awareness about the advantages of open banking can contribute to greater consumer adoption over time.

In conclusion, while the Global Open Banking Market presents significant opportunities for innovation and collaboration, it is not without its challenges. Addressing issues related to security, standardization, resistance from traditional banking institutions, regulatory complexity, and building consumer trust are imperative for the sustained growth and success of open banking initiatives worldwide. The industry must navigate these challenges collectively through collaboration, technological advancements, and a commitment to ensuring a secure and transparent financial ecosystem that benefits both financial institutions and consumers alike.

Key Market Trends

Expansion of Open Banking Ecosystems

One prominent recent trend in the Global Open Banking Market is the expansion of open banking ecosystems. Traditionally, open banking focused on collaboration

between banks and third-party providers. However, the trend is evolving towards broader ecosystems that include a diverse range of participants. This expansion encompasses not only traditional financial institutions and FinTech firms but also involves collaborations with technology companies, e-commerce platforms, and other non-banking entities. As a result, the open banking landscape is becoming more interconnected, fostering innovation across various industries. This trend is driven by the recognition that diverse partnerships can lead to the development of more comprehensive and customer-centric financial solutions.

The emergence of ecosystems encourages financial institutions to offer integrated services that go beyond traditional banking. For example, partnerships between banks and retail platforms may enable seamless financial transactions within e-commerce environments. This trend not only enhances customer experiences but also opens up new revenue streams for participants in the open banking ecosystem.

Rise of Embedded Finance

Another noteworthy trend in the Global Open Banking Market is the rise of embedded finance. Embedded finance involves integrating financial services directly into non-financial platforms, products, or services. This trend leverages the capabilities of open banking APIs to embed financial functionalities seamlessly within various applications, such as e-commerce platforms, travel apps, and even social media networks. For instance, consumers can access loans, make payments, or manage investments without leaving the platform they are using.

The rise of embedded finance is transforming the way consumers interact with financial services, making them more accessible and convenient. Traditional financial products, such as savings accounts or credit offerings, are becoming modular and can be embedded into different digital experiences. This trend blurs the lines between banking and other industries, creating new opportunities for collaboration and enhancing the overall customer journey.

Increased Emphasis on Data Analytics and AI

Data analytics and artificial intelligence (AI) are playing a pivotal role in shaping recent trends in the Global Open Banking Market. As the volume of financial data generated through open banking increases, institutions are leveraging advanced analytics and AI technologies to derive meaningful insights. This enables personalized and predictive financial services, enhancing customer engagement and decision-making.

Financial institutions are using AI algorithms to analyze transaction patterns, assess credit risk more accurately, and detect fraudulent activities in real-time. Moreover, AI-powered chatbots and virtual assistants are being integrated into open banking interfaces to provide customers with instant and personalized assistance. The convergence of open banking and AI is not only improving operational efficiency but also delivering more tailored and intelligent financial solutions.

Regulatory Sandboxes and Innovation Hubs

Recent trends in the Global Open Banking Market include the establishment of regulatory sandboxes and innovation hubs by governments and regulatory bodies. Regulatory sandboxes provide a controlled environment where financial institutions, FinTech firms, and other innovators can test new products and services without full compliance with existing regulations. These initiatives aim to strike a balance between encouraging innovation and ensuring consumer protection and financial stability.

Regulatory sandboxes allow participants to experiment with new technologies and business models, fostering a culture of innovation within the industry. Governments and regulatory bodies are recognizing the importance of creating supportive environments that facilitate the development and testing of open banking solutions. This trend not only encourages experimentation but also enables regulators to stay informed about emerging trends and challenges, contributing to the evolution of regulatory frameworks in tandem with industry developments.

Focus on Financial Inclusion

A significant trend in the Global Open Banking Market is the growing emphasis on financial inclusion. Open banking has the potential to bridge gaps in access to financial services by enabling the development of more inclusive and affordable solutions. Financial institutions, in collaboration with technology partners, are leveraging open banking to reach underserved populations, including those without traditional banking accounts.

The use of open banking APIs facilitates the creation of innovative products, such as digital wallets, microfinance solutions, and peer-to-peer lending platforms, which cater to the specific needs of unbanked or underbanked individuals. Governments and regulatory bodies are also recognizing the role of open banking in advancing financial inclusion agendas, leading to initiatives that encourage the development of inclusive

financial ecosystems. This trend aligns with broader global efforts to ensure that advancements in financial technology benefit a more extensive and diverse population.

In conclusion, recent trends in the Global Open Banking Market reflect a dynamic landscape marked by the expansion of ecosystems, the rise of embedded finance, increased reliance on data analytics and AI, the establishment of regulatory sandboxes, and a focus on financial inclusion. These trends collectively indicate the evolution of open banking beyond its initial collaborative framework, pointing towards a future where financial services are seamlessly integrated into diverse digital experiences, driven by innovation and a commitment to serving a broader spectrum of consumers.

Segmental Insights

Financial Services Insights

The Payments segment is experiencing a robust surge in demand within the Global Open Banking Market. As consumers increasingly seek faster, more efficient, and innovative payment solutions, open banking plays a pivotal role in meeting these demands. The adoption of open banking APIs facilitates seamless integration between financial institutions and payment service providers, enabling the development of innovative payment solutions. Open banking enhances the speed and security of transactions by allowing third-party providers to access account information and initiate payments with user consent. This trend is reshaping the payments landscape, leading to the emergence of new and competitive players in the industry.

Furthermore, the rising demand from the Payments segment is driving collaborations and partnerships between traditional banks and FinTech firms, resulting in a diverse range of payment services. From peer-to-peer transfers to real-time payments and cross-border transactions, open banking is enabling a more interconnected and efficient payments ecosystem. The emphasis on enhancing the customer experience and providing a wide array of payment options is propelling the Payments segment to the forefront of open banking innovations, shaping the future of digital payments on a global scale.

Distribution Channel Insights

The App market segment is experiencing a notable surge in demand within the Global Open Banking Market. With the widespread adoption of smartphones and the increasing reliance on mobile applications for financial management, consumers are

seeking integrated and user-friendly banking experiences. Open banking is playing a pivotal role in meeting this demand by enabling seamless integration between banking services and mobile applications. This trend is particularly evident in the development of banking apps that leverage open banking APIs to provide users with comprehensive views of their financial data, facilitate fund transfers, and offer personalized financial insights.

The rising demand from the App market segment is driving increased collaboration between traditional financial institutions, FinTech companies, and app developers. These collaborations result in the creation of feature-rich apps that go beyond basic banking functionalities, incorporating budgeting tools, investment tracking, and even AI-powered financial advice. As consumers increasingly rely on mobile apps for their banking needs, the App market segment in the Global Open Banking Market is poised for continued growth, with ongoing innovations aimed at delivering more convenient and tailored financial experiences to users worldwide.

Regional Insights

The North America region is witnessing a significant surge in demand within the Global Open Banking Market. The growing digitalization of financial services, coupled with a tech-savvy consumer base, is propelling the adoption of open banking in the region. Consumers in North America are increasingly seeking more personalized and convenient banking experiences, and open banking offers the infrastructure to meet these expectations. The regulatory environment in North America is also evolving to support open banking initiatives, with a focus on enhancing competition, innovation, and consumer empowerment. As a result, financial institutions across the region are actively exploring open banking strategies to stay competitive, foster collaboration with FinTech firms, and provide customers with a broader range of financial services.

Moreover, the rise of FinTech companies and technology giants in North America is contributing to the expansion of the open banking market. Collaborations between traditional banks and innovative FinTech startups are driving the development of new and sophisticated financial products and services. With the region being a global hub for technological innovation, the North America region is poised to play a leading role in shaping the future trajectory of the Global Open Banking Market, influencing trends and setting benchmarks for open banking adoption worldwide.

Key Market Players

Bannco Bilbao Vizcaya Argentaria, S.A.

Crédit Agricole

DemystData, Ltd.

Finleap connect

Finastra

FormFree Holdings Corporation

Jack Henry & Associates, Inc.

Mambu

MineralTree, Inc.

NCR Corporation

Report Scope:

In this report, the Global Open Banking Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Open Banking Market, By Financial Services:

Banking & Capital Markets

Payments

Digital Currencies

Value Added Services

Open Banking Market, By Distribution Channel:

Bank Channel

App Market

Distributors

Aggregators

Open Banking Market, By Region:

North America

United States

Canada

Mexico

Europe

France

Germany

Spain

Italy

United Kingdom

Asia-Pacific

China

Japan

India

Vietnam

South Korea

Middle East & Africa

South Africa

Saudi Arabia

UAE

Turkey

Kuwait

Egypt

South America

Brazil

Argentina

Colombia

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Open Banking Market.

Available Customizations:

Global Open Banking Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

Contents

- 1. Introduction
 - 1.1. Market Overview
 - 1.2. Key Highlights of the Report
 - 1.3. Market Coverage
 - 1.4. Market Segments Covered
 - 1.5. Research Tenure Considered

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Market Overview
- 3.2. Market Forecast
- 3.3. Key Regions
- 3.4. Key Segments

4. VOICE OF CUSTOMER

- 4.1. Factors Influencing Purchase Decision
- 4.2. Sources of Information

5. GLOBAL OPEN BANKING MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Financial Services Market Share Analysis (Banking & Capital Markets, Payments, Digital Currencies, Value Added Services)
 - 5.2.2. By Distribution Channel Market Share Analysis (Bank Channel, App Market,

Distributors, Aggregators)

5.2.3. By Regional Market Share Analysis

5.2.3.1. North America Market Share Analysis

5.2.3.2. Europe Market Share Analysis

5.2.3.3. Asia-Pacific Market Share Analysis

5.2.3.4. Middle East & Africa Market Share Analysis

5.2.3.5. South America Market Share Analysis

5.2.4. By Top 5 Companies Market Share Analysis, Others (2023)

5.3. Global Open Banking Market Mapping & Opportunity Assessment

5.3.1. By Financial Services Market Mapping & Opportunity Assessment

5.3.2. By Distribution Channel Market Mapping & Opportunity Assessment

5.3.3. By Regional Market Mapping & Opportunity Assessment

6. NORTH AMERICA OPEN BANKING MARKET OUTLOOK

6.1. Market Size & Forecast

6.1.1. By Value

6.2. Market Share & Forecast

6.2.1. By Financial Services Market Share Analysis

6.2.2. By Distribution Channel Market Share Analysis

6.2.3. By Country Market Share Analysis

6.2.3.1. United States Open Banking Market Outlook

6.2.3.1.1. Market Size & Forecast

6.2.3.1.1.1. By Value

6.2.3.1.2. Market Share & Forecast

6.2.3.1.2.1. By Financial Services Market Share Analysis

6.2.3.1.2.2. By Distribution Channel Market Share Analysis

6.2.3.2. Canada Open Banking Market Outlook

6.2.3.2.1. Market Size & Forecast

6.2.3.2.1.1. By Value

6.2.3.2.2. Market Share & Forecast

6.2.3.2.2.1. By Financial Services Market Share Analysis

6.2.3.2.2.2. By Distribution Channel Market Share Analysis

6.2.3.3. Mexico Open Banking Market Outlook

6.2.3.3.1. Market Size & Forecast

6.2.3.3.1.1. By Value

6.2.3.3.2. Market Share & Forecast

6.2.3.3.2.1. By Financial Services Market Share Analysis

6.2.3.3.2.2. By Distribution Channel Market Share Analysis

7. EUROPE OPEN BANKING MARKET OUTLOOK

7.1. Market Size & Forecast

7.1.1. By Value

7.2. Market Share & Forecast

7.2.1. By Financial Services Market Share Analysis

7.2.2. By Distribution Channel Market Share Analysis

7.2.3. By Country Market Share Analysis

7.2.3.1. France Open Banking Market Outlook

7.2.3.1.1. Market Size & Forecast

7.2.3.1.1.1. By Value

7.2.3.1.2. Market Share & Forecast

7.2.3.1.2.1. By Financial Services Market Share Analysis

7.2.3.1.2.2. By Distribution Channel Market Share Analysis

7.2.3.2. Germany Open Banking Market Outlook

7.2.3.2.1. Market Size & Forecast

7.2.3.2.1.1. By Value

7.2.3.2.2. Market Share & Forecast

7.2.3.2.2.1. By Financial Services Market Share Analysis

7.2.3.2.2.2. By Distribution Channel Market Share Analysis

7.2.3.3. Spain Open Banking Market Outlook

7.2.3.3.1. Market Size & Forecast

7.2.3.3.1.1. By Value

7.2.3.3.2. Market Share & Forecast

7.2.3.3.2.1. By Financial Services Market Share Analysis

7.2.3.3.2.2. By Distribution Channel Market Share Analysis

7.2.3.4. Italy Open Banking Market Outlook

7.2.3.4.1. Market Size & Forecast

7.2.3.4.1.1. By Value

7.2.3.4.2. Market Share & Forecast

7.2.3.4.2.1. By Financial Services Market Share Analysis

7.2.3.4.2.2. By Distribution Channel Market Share Analysis

7.2.3.5. United Kingdom Open Banking Market Outlook

7.2.3.5.1. Market Size & Forecast

7.2.3.5.1.1. By Value

7.2.3.5.2. Market Share & Forecast

7.2.3.5.2.1. By Financial Services Market Share Analysis

7.2.3.5.2.2. By Distribution Channel Market Share Analysis

8. ASIA-PACIFIC OPEN BANKING MARKET OUTLOOK

8.1. Market Size & Forecast

8.1.1. By Value

8.2. Market Share & Forecast

8.2.1. By Financial Services Market Share Analysis

8.2.2. By Distribution Channel Market Share Analysis

8.2.3. By Country Market Share Analysis

8.2.3.1. China Open Banking Market Outlook

8.2.3.1.1. Market Size & Forecast

8.2.3.1.1.1. By Value

8.2.3.1.2. Market Share & Forecast

8.2.3.1.2.1. By Financial Services Market Share Analysis

8.2.3.1.2.2. By Distribution Channel Market Share Analysis

8.2.3.2. Japan Open Banking Market Outlook

8.2.3.2.1. Market Size & Forecast

8.2.3.2.1.1. By Value

8.2.3.2.2. Market Share & Forecast

8.2.3.2.2.1. By Financial Services Market Share Analysis

8.2.3.2.2.2. By Distribution Channel Market Share Analysis

8.2.3.3. India Open Banking Market Outlook

8.2.3.3.1. Market Size & Forecast

8.2.3.3.1.1. By Value

8.2.3.3.2. Market Share & Forecast

8.2.3.3.2.1. By Financial Services Market Share Analysis

8.2.3.3.2.2. By Distribution Channel Market Share Analysis

8.2.3.4. Vietnam Open Banking Market Outlook

8.2.3.4.1. Market Size & Forecast

8.2.3.4.1.1. By Value

8.2.3.4.2. Market Share & Forecast

8.2.3.4.2.1. By Financial Services Market Share Analysis

8.2.3.4.2.2. By Distribution Channel Market Share Analysis

8.2.3.5. South Korea Open Banking Market Outlook

8.2.3.5.1. Market Size & Forecast

8.2.3.5.1.1. By Value

8.2.3.5.2. Market Share & Forecast

8.2.3.5.2.1. By Financial Services Market Share Analysis

8.2.3.5.2.2. By Distribution Channel Market Share Analysis

9. MIDDLE EAST & AFRICA OPEN BANKING MARKET OUTLOOK

9.1. Market Size & Forecast

9.1.1. By Value

9.2. Market Share & Forecast

9.2.1. By Financial Services Market Share Analysis

9.2.2. By Distribution Channel Market Share Analysis

9.2.3. By Country Market Share Analysis

9.2.3.1. South Africa Open Banking Market Outlook

9.2.3.1.1. Market Size & Forecast

9.2.3.1.1.1. By Value

9.2.3.1.2. Market Share & Forecast

9.2.3.1.2.1. By Financial Services Market Share Analysis

9.2.3.1.2.2. By Distribution Channel Market Share Analysis

9.2.3.2. Saudi Arabia Open Banking Market Outlook

9.2.3.2.1. Market Size & Forecast

9.2.3.2.1.1. By Value

9.2.3.2.2. Market Share & Forecast

9.2.3.2.2.1. By Financial Services Market Share Analysis

9.2.3.2.2.2. By Distribution Channel Market Share Analysis

9.2.3.3. UAE Open Banking Market Outlook

9.2.3.3.1. Market Size & Forecast

9.2.3.3.1.1. By Value

9.2.3.3.2. Market Share & Forecast

9.2.3.3.2.1. By Financial Services Market Share Analysis

9.2.3.3.2.2. By Distribution Channel Market Share Analysis

9.2.3.4. Turkey Open Banking Market Outlook

9.2.3.4.1. Market Size & Forecast

9.2.3.4.1.1. By Value

9.2.3.4.2. Market Share & Forecast

9.2.3.4.2.1. By Financial Services Market Share Analysis

9.2.3.4.2.2. By Distribution Channel Market Share Analysis

9.2.3.5. Kuwait Open Banking Market Outlook

9.2.3.5.1. Market Size & Forecast

9.2.3.5.1.1. By Value

9.2.3.5.2. Market Share & Forecast

9.2.3.5.2.1. By Financial Services Market Share Analysis

9.2.3.5.2.2. By Distribution Channel Market Share Analysis

9.2.3.6. Egypt Open Banking Market Outlook

9.2.3.6.1. Market Size & Forecast

9.2.3.6.1.1. By Value

9.2.3.6.2. Market Share & Forecast

9.2.3.6.2.1. By Financial Services Market Share Analysis

9.2.3.6.2.2. By Distribution Channel Market Share Analysis

10. SOUTH AMERICA OPEN BANKING MARKET OUTLOOK

10.1. Market Size & Forecast

10.1.1. By Value

10.2. Market Share & Forecast

10.2.1. By Financial Services Market Share Analysis

10.2.2. By Distribution Channel Market Share Analysis

10.2.3. By Country Market Share Analysis

10.2.3.1. Brazil Open Banking Market Outlook

10.2.3.1.1. Market Size & Forecast

10.2.3.1.1.1. By Value

10.2.3.1.2. Market Share & Forecast

10.2.3.1.2.1. By Financial Services Market Share Analysis

10.2.3.1.2.2. By Distribution Channel Market Share Analysis

10.2.3.2. Argentina Open Banking Market Outlook

10.2.3.2.1. Market Size & Forecast

10.2.3.2.1.1. By Value

10.2.3.2.2. Market Share & Forecast

10.2.3.2.2.1. By Financial Services Market Share Analysis

10.2.3.2.2.2. By Distribution Channel Market Share Analysis

10.2.3.3. Colombia Open Banking Market Outlook

10.2.3.3.1. Market Size & Forecast

10.2.3.3.1.1. By Value

10.2.3.3.2. Market Share & Forecast

10.2.3.3.2.1. By Financial Services Market Share Analysis

10.2.3.3.2.2. By Distribution Channel Market Share Analysis

11. MARKET DYNAMICS

11.1. Drivers

11.2. Challenges

12. IMPACT OF COVID-19 ON GLOBAL OPEN BANKING MARKET

12.1. Impact Assessment Model

12.1.1. Key Segments Impacted

12.1.2. Key Regions Impacted

12.1.3. Key Countries Impacted

13. MARKET TRENDS & DEVELOPMENTS

14. COMPETITIVE LANDSCAPE

14.1. Company Profiles

14.1.1. Bannco Bilbao Vizcaya Argentaria, S.A.

14.1.1.1. Company Details

14.1.1.2. Products

14.1.1.3. Financials (As Per Availability)

14.1.1.4. Key Market Focus & Geographical Presence

14.1.1.5. Recent Developments

14.1.1.6. Key Management Personnel

14.1.2. Cr?dit Agricole

14.1.2.1. Company Details

14.1.2.2. Products

14.1.2.3. Financials (As Per Availability)

14.1.2.4. Key Market Focus & Geographical Presence

14.1.2.5. Recent Developments

14.1.2.6. Key Management Personnel

14.1.3. DemystData, Ltd.

14.1.3.1. Company Details

14.1.3.2. Products

14.1.3.3. Financials (As Per Availability)

14.1.3.4. Key Market Focus & Geographical Presence

14.1.3.5. Recent Developments

14.1.3.6. Key Management Personnel

14.1.4. Finleap connect

14.1.4.1. Company Details

14.1.4.2. Products

14.1.4.3. Financials (As Per Availability)

14.1.4.4. Key Market Focus & Geographical Presence

- 14.1.4.5. Recent Developments
- 14.1.4.6. Key Management Personnel
- 14.1.5. Finastra
 - 14.1.5.1. Company Details
 - 14.1.5.2. Products
 - 14.1.5.3. Financials (As Per Availability)
 - 14.1.5.4. Key Market Focus & Geographical Presence
 - 14.1.5.5. Recent Developments
 - 14.1.5.6. Key Management Personnel
- 14.1.6. FormFree Holdings Corporation
 - 14.1.6.1. Company Details
 - 14.1.6.2. Products
 - 14.1.6.3. Financials (As Per Availability)
 - 14.1.6.4. Key Market Focus & Geographical Presence
 - 14.1.6.5. Recent Developments
 - 14.1.6.6. Key Management Personnel
- 14.1.7. Jack Henry & Associates, Inc.
 - 14.1.7.1. Company Details
 - 14.1.7.2. Products
 - 14.1.7.3. Financials (As Per Availability)
 - 14.1.7.4. Key Market Focus & Geographical Presence
 - 14.1.7.5. Recent Developments
 - 14.1.7.6. Key Management Personnel
- 14.1.8. Mambu
 - 14.1.8.1. Company Details
 - 14.1.8.2. Products
 - 14.1.8.3. Financials (As Per Availability)
 - 14.1.8.4. Key Market Focus & Geographical Presence
 - 14.1.8.5. Recent Developments
 - 14.1.8.6. Key Management Personnel
- 14.1.9. MineralTree, Inc.
 - 14.1.9.1. Company Details
 - 14.1.9.2. Products
 - 14.1.9.3. Financials (As Per Availability)
 - 14.1.9.4. Key Market Focus & Geographical Presence
 - 14.1.9.5. Recent Developments
 - 14.1.9.6. Key Management Personnel
- 14.1.10. NCR Corporation
 - 14.1.10.1. Company Details

- 14.1.10.2. Products
- 14.1.10.3. Financials (As Per Availability)
- 14.1.10.4. Key Market Focus & Geographical Presence
- 14.1.10.5. Recent Developments
- 14.1.10.6. Key Management Personnel

15. STRATEGIC RECOMMENDATIONS/ACTION PLAN

- 15.1. Key Focus Areas
- 15.2. Target Financial Services
- 15.3. Target Distribution Channel

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