

Saudi Arabia Account Payable Market By Component (Solution, Service-Managed, Professional), By Deployment (On-Premise, Cloud), By Enterprise Size (Large Enterprises, Small & Medium Enterprises), By Vertical (BFSI, Retail & Consumer Goods, Energy & Utility, Healthcare, IT & Telecommunication, Manufacturing, Other), By Region, Competition, Forecast and Opportunities, 2019-2029F

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Abstracts

Saudi Arabia Account Payable Market was valued at USD 4.2 million in 2023 and is expected to reach at USD 6.9 Million in 2029 and project robust growth in the forecast period with a CAGR of 8.4% through 2029. The Saudi Arabia accounts payable market is witnessing robust growth, driven by the country's rapid economic expansion and digital transformation initiatives. As businesses across Saudi Arabia increasingly seek to enhance financial management and operational efficiency, there is a rising demand for sophisticated accounts payable solutions. These solutions streamline invoice processing, automate payments, and improve accuracy in financial transactions, thereby reducing operational costs and mitigating errors. The market's expansion is further supported by the government's Vision 2030 program, which emphasizes technological advancement and digitalization in various sectors, including finance. The adoption of advanced technologies such as artificial intelligence, machine learning, and blockchain is reshaping the accounts payable landscape by enabling real-time data processing, enhancing transparency, and ensuring compliance with regulatory standards. Additionally, the increasing focus on financial compliance and risk management, coupled with the need for improved supplier relationship management, drives businesses to invest in comprehensive accounts payable systems. As Saudi

Arabia continues to modernize its financial infrastructure, the accounts payable market is expected to grow, reflecting the broader trends of efficiency and digital integration in the financial sector.

Key Market Drivers

Digital Transformation Initiatives

The Saudi Arabia accounts payable market is significantly driven by the country's broader digital transformation initiatives, especially those outlined in the Vision 2030 framework. This initiative underscores the importance of modernizing business practices and adopting advanced technologies across various sectors. For accounts payable functions, digital transformation translates to the automation of invoice processing, payment reconciliation, and financial reporting. This shift towards digital solutions enhances efficiency by reducing manual intervention, minimizing errors, and accelerating transaction processing times. The integration of technologies such as Robotic Process Automation (RPA) and Artificial Intelligence (AI) allows for the automation of repetitive tasks and the extraction of valuable insights from financial data. As businesses in Saudi Arabia seek to align with national digitalization goals, there is a growing adoption of electronic invoicing and payment systems that streamline accounts payable processes, improve accuracy, and ensure compliance with regulatory requirements. This technological advancement drives the market by making financial operations more efficient and agile, thus supporting the overall economic modernization goals of the country.

Increased Focus on Financial Efficiency

The growing emphasis on financial efficiency and cost reduction is a major driver of the Saudi Arabia accounts payable market. Organizations are increasingly recognizing the need to optimize their financial processes to achieve greater operational efficiency and reduce overhead costs. By implementing advanced accounts payable solutions, businesses can automate routine tasks, such as invoice matching, approval workflows, and payment processing, thereby reducing the time and resources required for these activities. Automation also helps in minimizing errors and discrepancies, leading to more accurate financial reporting and improved cash flow management. Furthermore, efficient accounts payable processes contribute to better supplier relationships by ensuring timely and accurate payments, which can enhance negotiation power and achieve cost savings. The drive towards financial efficiency is supported by the need to remain competitive in a rapidly evolving market and to meet the demands of investors and

stakeholders for transparency and effective financial management.

Regulatory Compliance Requirements

Regulatory compliance is a critical driver for the Saudi Arabia accounts payable market, as businesses face stringent requirements related to financial reporting, tax compliance, and anti-fraud measures. The Saudi Arabian government has implemented a series of regulations and standards aimed at enhancing financial transparency and ensuring compliance with international best practices. These include mandates for electronic invoicing, tax reporting, and financial audits. Accounts payable systems play a crucial role in helping organizations meet these compliance requirements by automating the documentation and reporting processes, ensuring that transactions are accurately recorded and easily accessible for audits. Advanced accounts payable solutions also incorporate features such as real-time compliance checks, automated tax calculations, and secure document storage to mitigate the risk of non-compliance and potential penalties. As regulatory requirements evolve and become more stringent, the demand for robust accounts payable systems that ensure compliance and provide audit trails continues to drive market growth.

Emergence of Advanced Analytics and AI

The emergence of advanced analytics and Artificial Intelligence (AI) is transforming the Saudi Arabia accounts payable market by providing deeper insights and enhancing decision-making capabilities. Advanced analytics tools enable organizations to analyze large volumes of financial data, identify trends, and make informed decisions based on predictive insights. AI technologies further augment this by automating complex processes, such as invoice matching and fraud detection, which traditionally required manual intervention. AI-powered systems can learn from historical data to improve accuracy and efficiency over time, reducing the likelihood of errors and enhancing process reliability. Additionally, AI-driven chatbots and virtual assistants streamline vendor interactions and support inquiries, further optimizing the accounts payable function. The integration of these technologies into accounts payable systems allows businesses to achieve greater operational efficiency, enhance financial visibility, and proactively manage risks. As Saudi Arabian businesses increasingly leverage advanced analytics and AI to drive innovation and competitive advantage, these technologies are expected to play a significant role in shaping the future of the accounts payable market.

Key Market Challenges

Integration with Legacy Systems

One of the primary challenges in the Saudi Arabia accounts payable market is integrating modern accounts payable solutions with existing legacy systems. Many organizations still operate with outdated financial systems that are not inherently compatible with new, advanced accounts payable technologies. This integration challenge can lead to significant operational disruptions, as aligning disparate systems often involves complex data migration and synchronization processes. Legacy systems may lack the necessary interfaces or APIs to seamlessly connect with contemporary software solutions, resulting in additional costs for custom development and system modifications. Furthermore, maintaining data integrity and consistency during the integration process is crucial to prevent errors and ensure accurate financial reporting. Organizations must also address the potential security risks associated with integrating old and new systems, as vulnerabilities in legacy software can expose the company to increased risks of data breaches or fraud. Successfully navigating this challenge requires a comprehensive strategy that includes careful planning, investment in integration tools, and potentially seeking expert consultation to ensure a smooth transition to modern accounts payable systems without compromising operational efficiency.

Data Security and Privacy Concerns

Data security and privacy concerns present a significant challenge in the Saudi Arabia accounts payable market, particularly with the increasing use of digital and cloud-based solutions. As organizations handle sensitive financial information, including invoice details, payment records, and vendor data, ensuring the protection of this information from unauthorized access and breaches is critical. The rise in cyber threats and sophisticated attack methods heightens the need for robust security measures to safeguard against data breaches and fraudulent activities. Compliance with stringent data protection regulations, such as those enforced by the Saudi Arabian government and international standards, adds another layer of complexity to managing data security. Organizations must implement advanced security protocols, such as encryption, multi-factor authentication, and regular security audits, to protect financial data and maintain trust with vendors and stakeholders. Additionally, the integration of accounts payable systems with other enterprise systems and third-party services can introduce vulnerabilities, requiring careful management of access controls and data sharing practices. Addressing these data security and privacy challenges is essential for maintaining operational integrity and regulatory compliance in the accounts payable function.

Change Management and User Resistance

Change management and user resistance are significant challenges faced by organizations in the Saudi Arabia accounts payable market when implementing new technologies or processes. Transitioning to advanced accounts payable systems often involves altering established workflows, which can encounter resistance from employees accustomed to traditional practices. This resistance can manifest as reluctance to adopt new technologies, lack of engagement during training sessions, and potential disruptions in productivity as staff adjust to new processes. Effective change management strategies are crucial to overcoming these challenges. Organizations need to communicate the benefits of new systems clearly, provide comprehensive training, and involve key stakeholders in the implementation process to gain buy-in and facilitate a smoother transition. Additionally, ongoing support and user feedback mechanisms are essential to address concerns and make necessary adjustments during the rollout phase. Ensuring that employees are well-prepared and supportive of the changes can help mitigate resistance and enhance the successful adoption and integration of new accounts payable solutions, ultimately leading to improved efficiency and operational performance.

Regulatory Compliance and Evolving Standards

Navigating regulatory compliance and evolving standards is a considerable challenge in the Saudi Arabia accounts payable market. Organizations are required to adhere to a range of financial regulations and standards, including those related to tax reporting, invoicing practices, and anti-fraud measures. Compliance with these regulations is crucial to avoid legal repercussions and financial penalties. However, the regulatory landscape is continually evolving, with frequent updates and new requirements introduced to address emerging financial practices and technologies. Keeping up with these changes can be resource-intensive and complex, requiring organizations to constantly update their accounts payable systems and processes to ensure ongoing compliance. This challenge is further compounded by the need to integrate compliance features into automated systems while maintaining operational efficiency. Businesses must invest in solutions that offer real-time compliance monitoring, automated reporting, and the flexibility to adapt to new regulatory requirements. Additionally, partnering with compliance experts and leveraging technology solutions that provide regular updates and support can help organizations stay ahead of regulatory changes and maintain a compliant accounts payable function.

Key Market Trends

Adoption of Robotic Process Automation (RPA)

The adoption of Robotic Process Automation (RPA) is a prominent trend in the Saudi Arabia accounts payable market, driven by the need for enhanced efficiency and accuracy in financial operations. RPA technology automates repetitive, rule-based tasks such as invoice processing, data entry, and payment reconciliations, significantly reducing manual intervention and the potential for human error. This trend is fueled by the desire for operational cost savings and faster processing times, as RPA can handle high volumes of transactions with greater speed and accuracy compared to traditional methods. Organizations are increasingly implementing RPA to streamline their accounts payable processes, which not only enhances efficiency but also provides real-time insights into financial operations. As businesses in Saudi Arabia continue to embrace digital transformation, the integration of RPA into accounts payable functions is becoming a critical component of their strategy to achieve greater operational agility and improve overall financial management.

Rise of Cloud-Based Accounts Payable Solutions

Cloud-based accounts payable solutions are gaining significant traction in Saudi Arabia, reflecting a broader trend towards digitalization and remote accessibility. These solutions offer several advantages, including scalability, flexibility, and cost-effectiveness, which are attractive to organizations of all sizes. Cloud-based systems facilitate real-time access to financial data, enabling remote management and collaboration across different departments and locations. This trend is particularly relevant in the context of Saudi Arabia's Vision 2030 initiative, which emphasizes technological innovation and the adoption of cloud technologies. By leveraging cloud-based accounts payable solutions, organizations can streamline their processes, reduce IT infrastructure costs, and enhance their ability to adapt to changing business needs. The shift towards cloud solutions also supports improved data security and compliance, as cloud providers offer advanced security features and regular updates to address emerging threats and regulatory requirements.

Increased Integration with Artificial Intelligence (AI)

The integration of Artificial Intelligence (AI) into accounts payable systems is emerging as a significant trend in Saudi Arabia, driven by the need for advanced data analysis and decision-making capabilities. AI technologies are being utilized to enhance various

aspects of accounts payable, including invoice matching, fraud detection, and predictive analytics. By analyzing large volumes of financial data, AI can identify patterns, detect anomalies, and provide actionable insights that improve decision-making and risk management. This trend is aligned with the broader push towards digital innovation and smart technologies within the Saudi Arabian market. AI-driven solutions offer the potential to automate complex processes, reduce errors, and increase overall efficiency in accounts payable operations. As businesses seek to leverage data-driven insights and enhance their financial management capabilities, the adoption of AI in accounts payable is expected to continue growing, providing a competitive edge and supporting the strategic goals of digital transformation.

Growing Emphasis on Regulatory Compliance

A growing emphasis on regulatory compliance is shaping the Saudi Arabia accounts payable market, driven by the need to adhere to stringent financial regulations and standards. Recent regulatory updates, including requirements for electronic invoicing and enhanced anti-fraud measures, have heightened the importance of compliance in accounts payable processes. Organizations are increasingly investing in systems that ensure they meet these regulatory requirements while also maintaining operational efficiency. This trend is supported by the need for accurate tax reporting, secure data handling, and transparent financial practices. Advanced accounts payable solutions are being designed to incorporate compliance features, such as automated tax calculations, real-time reporting, and secure document storage, to help businesses navigate the complex regulatory landscape. As regulatory requirements continue to evolve, the focus on compliance will drive the demand for solutions that offer robust regulatory support and ensure that organizations can effectively manage their accounts payable functions within legal and industry standards.

Enhanced Focus on Supplier Relationship Management

An enhanced focus on supplier relationship management is emerging as a key trend in the Saudi Arabia accounts payable market. Organizations are recognizing the importance of maintaining strong relationships with their suppliers to ensure timely deliveries, favorable terms, and overall operational efficiency. Advanced accounts payable systems are increasingly incorporating features that facilitate better supplier management, such as automated payment scheduling, dynamic discounting, and real-time communication tools. This trend reflects a broader shift towards optimizing supply chain processes and leveraging technology to strengthen business relationships. By improving transparency and efficiency in payment processes, organizations can build

trust and collaboration with their suppliers, leading to improved negotiation power and cost savings. The emphasis on supplier relationship management also aligns with the goals of enhancing overall financial performance and operational resilience, making it a critical focus area for businesses in the Saudi Arabian market as they seek to streamline their accounts payable functions and foster stronger partnerships.

Segmental Insights

Component Insights

The solution segment dominated the Saudi Arabia accounts payable market and is expected to maintain its leading position throughout the forecast period. This dominance is attributed to the increasing adoption of comprehensive accounts payable software solutions that offer end-to-end functionality, including invoice processing, payment automation, and financial reporting. The solution segment encompasses various software offerings designed to streamline and optimize accounts payable processes, providing organizations with robust tools to manage their financial operations efficiently. These solutions facilitate automation of routine tasks, reduce manual errors, and improve overall processing speed, which is crucial for businesses aiming to enhance operational efficiency and accuracy. As Saudi Arabia continues to advance its digital transformation initiatives, the demand for integrated software solutions that support automation and provide real-time financial insights remains high. Additionally, the trend towards cloud-based solutions and the integration of advanced technologies such as AI and machine learning further drives the growth of the solution segment, as these technologies enhance the capabilities of accounts payable systems and offer added benefits such as predictive analytics and fraud detection. While managed services and professional services also contribute to the market by offering support and consulting, the solution segment's emphasis on providing comprehensive, scalable, and customizable software solutions positions it as the dominant force in the accounts payable market. This trend is expected to persist as organizations continue to prioritize technological advancements and seek solutions that align with their goals of efficiency, compliance, and financial management excellence.

Enterprise Size Insights

The large enterprises segment dominated the Saudi Arabia accounts payable market and is expected to maintain its dominance throughout the forecast period. This dominance is primarily due to the significant scale and complexity of financial operations within large organizations, which necessitate advanced, comprehensive accounts

payable solutions. Large enterprises typically require robust systems that can handle high transaction volumes, integrate seamlessly with other enterprise applications, and provide sophisticated features such as automated workflows, real-time reporting, and advanced analytics. The scale of operations in large enterprises also means that the benefits of automation and efficiency gains from modern accounts payable solutions are substantial, driving higher investment in these technologies. Additionally, large organizations often have the financial resources and IT infrastructure to support and implement complex, high-cost solutions, making them more likely to adopt and maintain advanced accounts payable systems. The ongoing digital transformation and the need for compliance with stringent regulatory standards further drive the adoption of sophisticated accounts payable solutions within large enterprises. While small and medium enterprises (SMEs) also increasingly adopt accounts payable solutions, their adoption is often more gradual due to budget constraints and varying levels of IT infrastructure maturity. However, as technology costs decrease and cloud-based solutions become more accessible, SMEs are expected to adopt advanced accounts payable systems at a faster rate. Despite this, large enterprises' consistent need for comprehensive, scalable, and integrated accounts payable solutions ensures their continued dominance in the market. The trend towards digitalization and automation in financial management will likely reinforce the leading position of large enterprises, as they leverage these systems to enhance operational efficiency, accuracy, and compliance.

Regional Insights

The Riyadh region dominated the Saudi Arabia accounts payable market and is anticipated to maintain its leading position throughout the forecast period. Riyadh, as the capital and largest city of Saudi Arabia, serves as the primary economic and financial hub of the country. The region's dominance in the accounts payable market is attributed to its concentration of large enterprises, financial institutions, and government agencies, all of which drive significant demand for advanced financial management solutions. The presence of numerous multinational corporations and high-value business operations in Riyadh creates a substantial need for sophisticated accounts payable systems that can handle complex transactions, ensure compliance with regulatory requirements, and enhance operational efficiency. Additionally, the Riyadh region benefits from substantial investments in infrastructure and technology, which support the deployment and integration of cutting-edge accounts payable solutions. The city's strategic importance in the Saudi Arabian economy, combined with its role as a center for business and finance, reinforces its position as the dominant region in the accounts payable market. As Saudi Arabia continues to pursue its Vision 2030

objectives, which emphasize economic diversification and technological advancement, Riyadh's status as a key player in the financial sector will likely continue to attract investment in advanced accounts payable technologies. The region's focus on digital transformation and modernization of financial processes further solidifies its leadership position in the market. While other regions, such as Jeddah and Dhahran, also contribute to the growth of the accounts payable market, Riyadh's concentration of economic activity and infrastructure development ensures its ongoing dominance in shaping the future of accounts payable solutions in Saudi Arabia.

Key Market Players

Tungsten Automation Corporation

SAP SE

Oracle Corporation

Tipalti Inc.

Tradecraft Holdings, Inc.

Sage Group plc

Koch Industries Inc.

Basware Corporation

Coupa Software Inc.

OneNetworks, Inc.

Report Scope:

In this report, the Saudi Arabia Account Payable Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Saudi Arabia Account Payable Market, By Component:

Saudi Arabia Account Payable Market By Component (Solution, Service-Managed, Professional), By Deployment (On-...

Solution

Service-Managed

Professional

Saudi Arabia Account Payable Market, By Deployment:

On-Premise

Cloud

Saudi Arabia Account Payable Market, By Vertical:

BFSI

Retail & Consumer Goods

Energy & Utility

Healthcare

IT & Telecommunication

Manufacturing

Other

Saudi Arabia Account Payable Market, By Enterprise Size:

Large Enterprises

Small & Medium Enterprises

Saudi Arabia Account Payable Market, By Region:

Riyadh

Makkah

Madinah

Jeddah

Tabuk

Eastern Province

Rest of Saudi Arabia

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Saudi Arabia Account Payable Market.

Available Customizations:

Saudi Arabia Account Payable Market report with the given market data, TechSci 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. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Formulation of the Scope
- 2.4. Assumptions and Limitations
- 2.5. Sources of Research
 - 2.5.1. Secondary Research
 - 2.5.2. Primary Research
- 2.6. Approach for the Market Study
 - 2.6.1. The Bottom-Up Approach
 - 2.6.2. The Top-Down Approach
- 2.7. Methodology Followed for Calculation of Market Size & Market Shares
- 2.8. Forecasting Methodology
 - 2.8.1. Data Triangulation & Validation

3. EXECUTIVE SUMMARY

4. VOICE OF CUSTOMER

5. SAUDI ARABIA ACCOUNT PAYABLE MARKET OVERVIEW

6. SAUDI ARABIA ACCOUNT PAYABLE MARKET OUTLOOK

- 6.1. Market Size & Forecast
 - 6.1.1. By Value
- 6.2. Market Share & Forecast
 - 6.2.1. By Component (Solution, Service-Managed, Professional)
 - 6.2.2. By Deployment (On-Premise, Cloud)

- 6.2.3. By Enterprise Size (Large Enterprises, Small & Medium Enterprises)
- 6.2.4. By Vertical (BFSI, Retail & Consumer Goods, Energy & Utility, Healthcare, IT & Telecommunication, Manufacturing, Other)
- 6.2.5. By Region (Riyadh, Makkah, Madinah, Jeddah, Tabuk, Eastern Province, Rest of Saudi Arabia)
- 6.3. By Company (2023)
- 6.4. Market Map

7. RIYADH ACCOUNT PAYABLE MARKET OUTLOOK

- 7.1. Market Size & Forecast
 - 7.1.1. By Value
- 7.2. Market Share & Forecast
 - 7.2.1. By Component
 - 7.2.2. By Deployment
 - 7.2.3. By Enterprise Size
 - 7.2.4. By Vertical

8. MAKKAH ACCOUNT PAYABLE MARKET OUTLOOK

- 8.1. Market Size & Forecast
 - 8.1.1. By Value
- 8.2. Market Share & Forecast
 - 8.2.1. By Component
 - 8.2.2. By Deployment
 - 8.2.3. By Enterprise Size
 - 8.2.4. By Vertical

9. MADINAH ACCOUNT PAYABLE MARKET OUTLOOK

- 9.1. Market Size & Forecast
 - 9.1.1. By Value
- 9.2. Market Share & Forecast
 - 9.2.1. By Component
 - 9.2.2. By Deployment
 - 9.2.3. By Enterprise Size
 - 9.2.4. By Vertical

10. JEDDAH ACCOUNT PAYABLE MARKET OUTLOOK

10.1. Market Size & Forecast

10.1.1. By Value

10.2. Market Share & Forecast

10.2.1. By Component

10.2.2. By Deployment

10.2.3. By Enterprise Size

10.2.4. By Vertical

11. TABUK ACCOUNT PAYABLE MARKET OUTLOOK

11.1. Market Size & Forecast

11.1.1. By Value

11.2. Market Share & Forecast

11.2.1. By Component

11.2.2. By Deployment

11.2.3. By Enterprise Size

11.2.4. By Vertical

12. EASTERN PROVINCE ACCOUNT PAYABLE MARKET OUTLOOK

12.1. Market Size & Forecast

12.1.1. By Value

12.2. Market Share & Forecast

12.2.1. By Component

12.2.2. By Deployment

12.2.3. By Enterprise Size

12.2.4. By Vertical

13. REST OF SAUDI ARABIA ACCOUNT PAYABLE MARKET OUTLOOK

13.1. Market Size & Forecast

13.1.1. By Value

13.2. Market Share & Forecast

13.2.1. By Component

13.2.2. By Deployment

13.2.3. By Enterprise Size

13.2.4. By Vertical

14. MARKET DYNAMICS

- 14.1.Drivers
- 14.2.Challenges

15. MARKET TRENDS AND DEVELOPMENTS

16. COMPANY PROFILES

- 16.1.Tungsten Automation Corporation
 - 16.1.1. Business Overview
 - 16.1.2. Key Revenue and Financials
 - 16.1.3. Recent Developments
 - 16.1.4. Key Personnel/Key Contact Person
 - 16.1.5. Key Product/Services Offered
- 16.2.SAP SE
 - 16.2.1. Business Overview
 - 16.2.2. Key Revenue and Financials
 - 16.2.3. Recent Developments
 - 16.2.4. Key Personnel/Key Contact Person
 - 16.2.5. Key Product/Services Offered
- 16.3.Oracle Corporation
 - 16.3.1. Business Overview
 - 16.3.2. Key Revenue and Financials
 - 16.3.3. Recent Developments
 - 16.3.4. Key Personnel/Key Contact Person
 - 16.3.5. Key Product/Services Offered
- 16.4.Tipalti Inc.
 - 16.4.1. Business Overview
 - 16.4.2. Key Revenue and Financials
 - 16.4.3. Recent Developments
 - 16.4.4. Key Personnel/Key Contact Person
 - 16.4.5. Key Product/Services Offered
- 16.5.Tradeshift Holdings, Inc.
 - 16.5.1. Business Overview
 - 16.5.2. Key Revenue and Financials
 - 16.5.3. Recent Developments
 - 16.5.4. Key Personnel/Key Contact Person
 - 16.5.5. Key Product/Services Offered

16.6.Sage Group plc

- 16.6.1. Business Overview
- 16.6.2. Key Revenue and Financials
- 16.6.3. Recent Developments
- 16.6.4. Key Personnel/Key Contact Person
- 16.6.5. Key Product/Services Offered

16.7.Koch Industries Inc.

- 16.7.1. Business Overview
- 16.7.2. Key Revenue and Financials
- 16.7.3. Recent Developments
- 16.7.4. Key Personnel/Key Contact Person
- 16.7.5. Key Product/Services Offered

16.8.Basware Corporation

- 16.8.1. Business Overview
- 16.8.2. Key Revenue and Financials
- 16.8.3. Recent Developments
- 16.8.4. Key Personnel/Key Contact Person
- 16.8.5. Key Product/Services Offered

16.9.Coupa Software Inc.

- 16.9.1. Business Overview
- 16.9.2. Key Revenue and Financials
- 16.9.3. Recent Developments
- 16.9.4. Key Personnel/Key Contact Person
- 16.9.5. Key Product/Services Offered

16.10. OneNetworks, Inc.

- 16.10.1. Business Overview
- 16.10.2. Key Revenue and Financials
- 16.10.3. Recent Developments
- 16.10.4. Key Personnel/Key Contact Person
- 16.10.5. Key Product/Services Offered

17. STRATEGIC RECOMMENDATIONS**18. ABOUT US & DISCLAIMER**

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