

# Enterprise Services Total Addressable Market Spotlight Service

## **A Spotlight Service Complementing the Service Provider Enterprise & Wholesale Service Area Package**

Total global enterprise services addressable market and five year forecast covering 74 services across seven categories (application, infrastructure, cloud, networks, workplace, business process outsourcing, and security), split by geography and industry.

“ The flood of emerging digital technologies has only led to increased ICT complexity for enterprises. Many struggle on several fronts. Security continues to be at the forefront of any ICT engagements given the proliferation of cyberattacks. ”

**Adrian Ho**  
Analyst

# Enterprise Services Total Addressable Market Spotlight Service

*A Service Complementing the Service Provider  
Enterprise & Wholesale Service Area Package*

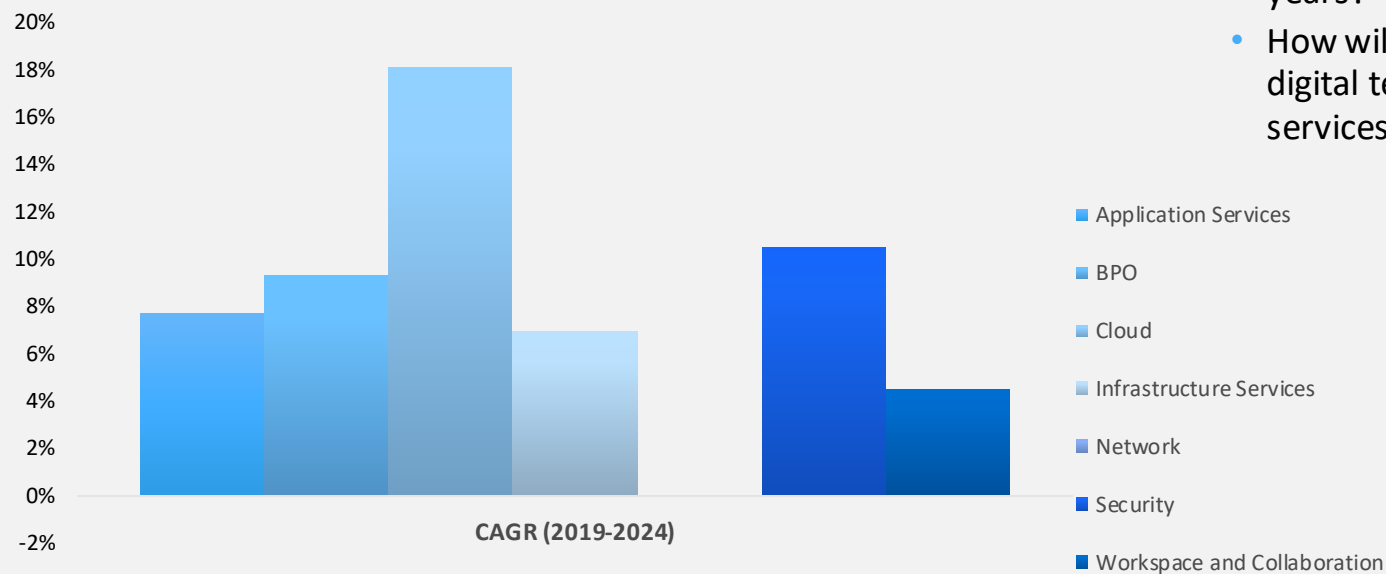
Cloud services will  
grow at a CAGR of  
18% globally from  
2019 to 2024

## HOW OMDIA HELPS YOU

- Identify opportunities in a range of established and emerging B2B ICT services
- Plan where best to allocate resources based on expected market developments
- Target your product and commercial teams to maximize growth

## KEY QUESTIONS ADDRESSED

- What are the top services opportunities over the next five year?
- What will the key drivers of growth be over the next five years?
- Which service segments will benefit the most from digital modernization and transformation?
- How significant will enterprise spend be on emerging security services over the next five years?
- How will the growth trajectory of emerging digital technologies compare with legacy IT services?



# Enterprise Services Total Addressable Market: Our Expert Analysts



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Practice Leader, Digital  
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**Brian Washburn**  
Research Director,  
Enterprise Services &  
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Senior Principal Analyst,  
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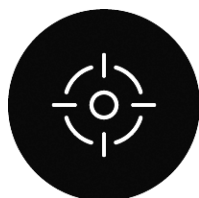


**Hansa Iyengar**  
Principal Analyst,  
Digital Enterprise Services



**Adam Holtby**  
Principal Analyst,  
Mobile Workspace

# Enterprise Services Total Addressable Market: Deliverables



## MARKET DATA

—Bi-annual—

Overall TAM for every service delivered in an XLS pivot, with splits for vertical and geography



## ANALYST ACCESS

—Ongoing—

Prompt responses to urgent and unique questions.

# Enterprise Services Total Addressable Market: Market Data

## Enterprise services TAM – Five Year Forecast

Global service revenues for enterprise services by category for 20 countries and all regions, and 16 industries .

**Frequency:** Bi-annual

### SERVICE AREAS (74)

#### Network:

- Dedicated internet access
- Ethernet VPN
- Fixed broadband services
- Managed LAN services
- Managed router services
- Managed SD WAN services
- Managed WLAN services
- MPLS
- Private leased circuits
- WAN optimization services

#### Infrastructure Services

- BCDR as a service
- Banking
- Colocation
- Datacenter professional services and consulting
- Managed datacenter services
- Managed desktop services
- Managed hosting
- Managed storage
- Service helpdesk

#### Cloud

- Business-analytics-as-a-service (BAaaS)
- Business continuity

- Cloud professional services
- Contact-center-as-a-service (CCaaS)
- Customer-relationship-management-as-a-service (CRMaaS)
- Dedicated cloud
- Enterprise-resource-planning-as-a-service (ERPaaS)
- Human-capital-management-as-a-service (HCMaaS)
- Infrastructure-as-a-service (IaaS)
- Managed hybrid cloud services
- Managed private cloud services
- Multitenant hosted/public cloud/UCaaS
- Platform-as-a-service (PaaS)
- Productivity-tools-as-a-service (PTaaS)

- SaaS – others
- Supply-chain-as-a-service (SCaaS)

#### Security

- Data and apps security
- Description
- Endpoint security
- Identity and access management
- Incident response
- Managed SOC
- Network security
- Security information and event management services
- Security professional services
- Security services – others
- Threat management

# Enterprise Services Total Addressable Market: Market Data, cont'd

## Enterprise services TAM – Five Year Forecast

### Workspace and collaboration

- Dedicated hosted/private cloud UC services
- Managed and hosted conferencing services
- Managed and hosted contact centers
- Managed and hosted telephony
- Managed premise-based UC services
- Mobile application management services
- Mobile data
- Mobile device management services
- Mobile voice
- Web or video-enabled conferencing services

- Contact center professional services
- Workspace professional services

### Application Services

- Application professional services and consulting
- Application system integration
- Application testing
- Applications development
- Custom application deployment
- Hosted business intelligence
- Hosted customer relationship management services
- Hosted enterprise resource planning services
- Hosted human capital management
- Hosted others

- Hosted supply chain management
- Mobile applications development

### BPO

- Customer engagement BPO
- Finance and accounting BPO
- HR BPO
- Marketing BPO

### INDUSTRIES

- Capital Markets
- Education
- Energy
- Healthcare
- Information Technology
- Insurance
- Manufacturing
- Media & Entertainment
- Others
- Professional Services
- Public sector – Government
- Retail
- Retail Banking
- Transportation & Logistics
- Utilities

# Enterprise Services Total Addressable Market: Market Data, cont'd

## Enterprise services TAM – Five Year Forecast

### REGIONS

- Australia
- Brazil
- Canada
- China
- France
- Germany
- India
- Indonesia
- Italy
- Japan
- Mexico
- Nigeria
- Rest of Africa
- Rest of Central & Southern Asia
- Rest of Eastern Europe
- Rest of Latin America & the Caribbean
- Rest of Middle East
- Rest of Oceania, Eastern & South-Eastern Asia
- Rest of Western Europe
- Russia
- Saudi Arabia
- South Africa
- South Korea
- Spain
- Turkey
- UK
- USA
- Global Total

# Related Research: Service Provider Enterprise & Wholesale Service Area Coverage



## Service Area Package: **Service Provider Enterprise & Wholesale**

Digital Enterprise Services  
Intelligence Service

SOHO & SME Services  
Intelligence Service

Enterprise Premises Networks  
Intelligence Service

Network Transformation Services  
Intelligence Service

Private Networks  
Intelligence Service

Unified Comms. and Collaboration  
Intelligence Service

Wholesale Telecoms  
Intelligence Service

Enterprise Mobility  
Intelligence Service

Service Provider Enterprise & Wholesale Viewpoint Service

IT Services Contracts  
Spotlight Service

Enterprise Services TAM  
Spotlight Service

## About Omdia's Service Provider Enterprise and Wholesale Research

Omdia helps service providers establish a coherent strategy while building, running, and scaling a profitable B2B business. As more businesses choose to run more ICT as managed or cloud-based services, so service providers find themselves competing against and partnering with, an ever more complex ecosystem of vendors and platform providers.

Omdia's expert team of analysts provides strategic advice based on a robust foundation of market data to help service providers transform how they build, sell, monetize and support new services, from network to cloud, to the digital workplace.

### Custom solutions

Omdia's consulting services offer a true end-to-end service capability across all aspects of your product lifecycle, from concept and product development, to go-to-market and sales effectiveness. *Contact us* if you have a project that you would like to discuss with a member of the team.





# Our “Ask an Analyst” Service Provides Best in Class Customer Support

Whether you need guidance to navigate the service, information regarding our methodologies or you want to better understand a data trend, Omdia’s support team is here to help.

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- Understand more about our methodologies

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**Tom Coate**  
Customer Success  
Manager



**Kâren Dyer**  
Customer Success  
Manager



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### ABOUT OMDIA

Omdia is a global technology research powerhouse, established following the merger of the research division of Informa Tech (Ovum, Heavy Reading, and Tractica) and the acquired Omdia technology research portfolio\*. We combine the expertise of more than 400 analysts across the entire technology spectrum, covering 150 markets. We publish over 3,000 research reports annually, reaching more than 14,000 subscribers, and cover thousands of technology, media, and telecommunications companies.

Our exhaustive intelligence and deep technology expertise enable us to uncover actionable insights that help our customers connect the dots in today's constantly evolving technology environment and empower them to improve their businesses—today and tomorrow.

\* The majority of Omdia technology research products and solutions were acquired by Informa in August 2019 and are now part of Omdia.