

Identity and Access Management Market: Market Segments: By Component (Solutions and Services); By Deployment Mode (On-Premises and Cloud); By Organization Size (Large Enterprises, and Small and Medium-sized Enterprises (SMEs)); By Vertical (BFSI, IT & Telecom, Public Sector and Utilities, Healthcare, Education, Manufacturing, Retail and Others); and Region – Global Analysis by Market Size, Share & Trends for 2014 – 2020 and Forecasts to 2030

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Abstracts

Product Overview

Identity and Access Management (IAM) ensures that only legally approved workers have access to the right tools in a highly heterogeneous technological environment. It is a solution that controls access to resources for companies. This primarily ensures that staff, partners, and clients have convenient and safe access to the appropriate applications. Businesses use IAM systems to safely initiate, store and manage user identities and permissions for entry. It offers the versatility that companies need to respond to the new technology and developments, expanding their businesses beyond the typical perimeter.

Market Highlights

Identity and Access Management Market is expected to project a notable CAGR of 14.5% in 2030.

Identity and Access Management Market to surpass USD 26.6 billion by 2030 from USD 10.32 billion in 2019 at a CAGR of 14.5% throughout the forecast period, i.e., 2020-30.

The emergence of cloud-based identity and access management software has fueled

the market growth. The introduction of mandatory policies by national governmental cyber authorities to avoid data loss and enhance protection is a major factor driving the growth of the identity and access management solution industry. Besides, IAM solutions have been needed by the proliferation of Bring Your Own Devices (BYOD), the Internet of Things (IoT), mobility, and remote workers to be adopted by organizations, driving growth. Besides, the ongoing possibility of cyber-attacks to steal confidential company data is helping the market to thrive over the coming years.

Identity and Access Management Market: Segments

Cloud deployment to grow with the highest CAGR of 15.9% during 2020-30

Identity and Access Management Market is segmented by deployment into cloud and on-premise. On-premise solutions based on deployments, led the market in 2019, accounting for over 52.7 % of the market share. Large organizations benefit from cost savings associated with automated user provisioning, as well as enhanced audit capabilities and compliance with their entire portfolio of Software as a Service (SaaS), WebEx, Google Apps, and Box.net. Whereas, the cloud segment is projected to record enormous growth over the forecast period. Due to its cost-effectiveness and economies of scale, rising cloud model adoption by different organizations is one of the primary factors contributing to segment growth. To optimize cloud advantages, a greater number of IT, sales, and business functionality are moving to the cloud. With no software or hardware deployment, cloud-based IAM services and products have many benefits, such as simplified management and reduced costs.

BFSI segment to grow with the highest CAGR during 2020-30

Identity and Access Management Market is segmented by Vertical as BFSI, telecom and IT, energy, oil and gas, education, public sector and utilities, healthcare, and manufacturing, and others. IT and Telecom accounted for the higher market share in 2018, as IT companies offering IT solutions & services to financial organizations are expanding their IT security capabilities through strategic partnerships. The BFSI segment is expected to record the highest CAGR over the forecast period. This sector holds critical customer data that needs a high degree of security. Companies in this sector are adopting IAM technology to boost performance, ensure compliance, and reduce the cost of IT management. Logical and physical securities are likely to continue to converge into coherent solutions against the backdrop of rapidly advancing mobile banking applications. Biometric authentication at the ATM and switch to EMV debit and credit cards are also expected to increase identity and access control demand at the same time.

Identity and Access Management Market: Market Dynamics

Drivers

Substantial growth in data breaches, identity theft, and hacking incidents

Identity and access management market growth is attributed to the rising risks of data exposure, data loss, data leakage, insider attacks, and unsafe use. These cyber-attacks are motivated by the rapid introduction of emerging technology such as cloud-based applications, the Internet of Things (IoT), and Bring Your Own Devices (BYOD) by organizations. Strict regulations are imposed by governments around the world to protect the digital identity of users and prohibit unauthorized access. This would boost the quality of security, reduce insider attacks and improve the organizational effectiveness of businesses and government agencies.

Increasing need for IAM for IoT

IAM's IoT involvement is expanding like never before. IAM focuses on finding people and ensuring access to different data forms. IAM helps to separate devices while also managing users' access to data, thus protecting against breaches and malicious activities. IoT generates the need for exponential handling of more identities than what the existing IAM systems need to maintain. IAM offers many IoT benefits to provide a stable environment for users, such as how a user can manage access to all linked items and the data they hold and how they can control what people or devices can do. Therefore, IAM solutions allow global SMEs and large businesses to provide a secure, frictionless, and improved user experience, driving the growth of the global IAM market.

Restrain

Lack of standards and budgetary limitations in the implementation of IAM solutions

The growing environment of cyber threats is one of the biggest challenges for businesses across market verticals. The growth of the IAM industry is limited by the lack of identity requirements and insufficient budgetary resources, combined with the high cost of installing IAM solutions. The initial investment and maintenance costs for using IAM systems are considerable because of the need to implement robust security technologies. Inadequate budgets continue to be a crucial obstacle to IAM professionals conducting IT security operations effectively. Budgetary constraints have been found in major economies, such as in some areas of APAC, the MEA, and Latin America, where companies are either bootstrapped or run-on limited capital.

Identity and Access Management Market: Key Players

SailPoint Technologies Holdings, Inc.

Company Overview, Business Strategy, Key Product Offerings, Financial Performance,

Key Performance Indicators, Risk Analysis, Recent Development, Regional Presence, and SWOT Analysis.

Centrify Corporation

Dell Inc.

IBM Corporation

Microsoft Corporation

ForgeRock

CA Technologies

Crossmatch

Gemalto

IWelcome

Okta, Inc.

Oracle

Ping Identity

Symantec Corporation

Identity and Access Management Market: Regions

The identity and Access Management Market is segmented based on regional analysis into five major regions. These include North America, Latin America, Europe, APAC, and MENA.

Identity and Access Management Market in North America held the largest market share of 38.2% in the year 2018 and it is expected to continue its market dominance in the future as a favorable regulatory scenario is a primary factor stimulating regional growth. Several U.S. federal agencies, such as hardware-based personal identity identification cards, have incorporated stringent authentication requirements for their employees for accessing government IT infrastructure and networks. Asia Pacific (APAC) has seen advanced and dynamic adoption of new technologies and is expected to record the highest CAGR in the worldwide IAM industry during the forecast period. APAC's major economies, such as China, Japan, Australia, and India, are expected to experience strong IAM business growth rates. Industries such as financial institutions, the public sector, healthcare, retail, education, telecommunications, manufacturing, energy and utilities, transport and logistics, hospitality, media, and entertainment are expected to introduce the highest level of IAM solutions in the region.

Competitive Landscape:

The Identity and Access Management market, which is highly competitive, consists of several major players such as IBM (US), Microsoft (US), Salesforce (US), Oracle (US), Broadcom (US), Okta (US), Ping Identity (US) hold a substantial market share in the

Identity and Access Management market. Other players analyzed in this report are ForgeRock (US), HID Global (US), Ubisecure (London), OneLogin (US), CyberArk (US), SAP (Germany), AWS (US), SailPoint Technologies (US), RSA (US), Saviynt (US), Avatier (US), SecureAuth Corporation (US), ManageEngine (US) among others.

The market competition has been stepped up by the availability of many players offering Identity and Access Management. For Instance, In July 2020, Microsoft partnered with Citrix to provide joint services and tools for the simplification and transition of on-premise Citrix customers to Microsoft Azure.

Identity and Access Management Market is further segmented by region into:

North America Market Size, Share, Trends, Opportunities, Y-o-Y Growth, CAGR – United States and Canada

Latin America Market Size, Share, Trends, Opportunities, Y-o-Y Growth, CAGR – Mexico, Argentina, Brazil, and Rest of Latin America

Europe Market Size, Share, Trends, Opportunities, Y-o-Y Growth, CAGR – United Kingdom, France, Germany, Italy, Spain, Belgium, Hungary, Luxembourg, Netherlands, Poland, NORDIC, Russia, Turkey, and Rest of Europe

APAC Market Size, Share, Trends, Opportunities, Y-o-Y Growth, CAGR – India, China, South Korea, Japan, Malaysia, Indonesia, New Zealand, Australia, and the Rest of APAC

MENA Market Size, Share, Trends, Opportunities, Y-o-Y Growth, CAGR – North Africa, Israel, GCC, South Africa, and Rest of MENA

Identity and Access Management Market report also contains analysis on:

Identity and Access Management Market Segments:

By Component:

Solutions

Data Directory

Storage

Synchronization/Meta directories

Virtualization/Virtual directories

Identity Lifecycle Management

Provisioning

De-provisioning

Authentication

Single Factor Authentication

2-Factor Authentication

Multi-Factor Authentication

Verification
Password Management
Self-service Password Reset (SSPR)
Password Reset
Password Synchronization
Access Management, and authorization
Audit, Compliance, and Governance
Services
Integration and Deployment
Support and Maintenance
Consulting
By Deployment Type:
On-premises
Cloud
By Organization Size:
Large Enterprises
Small and Medium-sized Enterprises (SMEs)
By Vertical:
BFSI
IT & Telecom
Public Sector and Utilities
Healthcare
Education
Manufacturing
Retail
Others
Identity and Access Management Market Dynamics
Identity and Access Management Market Size
Supply & Demand
Current Trends/Issues/Challenges
Competition & Companies Involved in the Market
Value Chain of the Market
Market Drivers and Restraints
FAQs on Identity and Access Management Market
Which segment is anticipated to hold the largest market share?
At what CAGR is the market anticipated to grow between 2020 and 2030?
Who are the key players in the Identity and Access Management Market?
What could be the challenging factors in the growth of Identity and Access Management Market?

What are the growth drivers for the Identity and Access Management Market?

Contents

1. EXECUTIVE SUMMARY

2. IDENTITY AND ACCESS MANAGEMENT MARKET

- 2.1. Product Overview
- 2.2. Market Definition
- 2.3. Segmentation
- 2.4. Assumptions and Acronyms

3. RESEARCH METHODOLOGY

- 3.1. Research Objectives
- 3.2. Primary Research
- 3.3. Secondary Research
- 3.4. Forecast Model
- 3.5. Market Size Estimation

4. AVERAGE PRICING ANALYSIS

5. MACRO-ECONOMIC INDICATORS

6. MARKET DYNAMICS

- 6.1. Growth Drivers
- 6.2. Restraints
- 6.3. Opportunity
- 6.4. Trends

7. CORRELATION & REGRESSION ANALYSIS

- 7.1. Correlation Matrix
- 7.2. Regression Matrix

8. RECENT DEVELOPMENT, POLICIES & REGULATORY LANDSCAPE

9. RISK ANALYSIS

9.1. Demand Risk Analysis

9.2. Supply Risk Analysis

10. IDENTITY AND ACCESS MANAGEMENT ANALYSIS

10.1. Porters Five Forces

10.1.1. Threat of New Entrants

10.1.2. Bargaining Power of Suppliers

10.1.3. Threat of Substitutes

10.1.4. Rivalry

10.2. PEST Analysis

10.2.1. Political

10.2.2. Economic

10.2.3. Social

10.2.4. Technological

11. IDENTITY AND ACCESS MANAGEMENT MARKET

11.1. Market Size & forecast, 2019A-2030F

11.1.1. By Value (USD Million) 2019-2030F; Y-o-Y Growth (%) 2020-2030F

11.1.2. By Volume (Million Units) 2019-2030F; Y-o-Y Growth (%) 2020-2030F

12. IDENTITY AND ACCESS MANAGEMENT: MARKET SEGMENTATION

12.1. By Regions

12.1.1. North America: By Value (USD Million) 2019-2030F; Y-o-Y Growth (%) 2020-2030F

12.1.2. Europe: By Value (USD Million) 2019-2030F; Y-o-Y Growth (%) 2020-2030F

12.1.3. Asia-Pacific: By Value (USD Million) 2019-2030F; Y-o-Y Growth (%) 2020-2030F

12.1.4. MEA: By Value (USD Million) 2019-2030F; Y-o-Y Growth (%) 2020-2030F

12.1.5. Latin America: By Value (USD Million) 2019-2030F; Y-o-Y Growth (%) 2020-2030F

12.2. By Component: Market Share (2020-2030F)

12.2.1. Solutions, By Value (USD Million) 2019-2030F; Y-o-Y Growth (%) 2020-2030F

12.2.2. Services, By Value (USD Million) 2019-2030F; Y-o-Y Growth (%) 2020-2030F

12.3. By Organization Size: Market Share (2020-2030F)

12.3.1. Large Enterprises, By Value (USD Million) 2019-2030F; Y-o-Y Growth (%)

2020-2030F

12.3.2. SMEs, By Value (USD Million) 2019-2030F; Y-o-Y Growth (%) 2020-2030F

12.4. By Deployment Type: Market Share (2020-2030F)

12.4.1. On-premises, By Value (USD Million) 2019-2030F; Y-o-Y Growth (%)

2020-2030F

12.4.2. Cloud, By Value (USD Million) 2019-2030F; Y-o-Y Growth (%) 2020-2030F

12.5. By Vertical: Market Share (2020-2030F)

12.5.1. BFSI, By Value (USD Million) 2019-2030F; Y-o-Y Growth (%) 2020-2030F

12.5.2. IT & Telecom, By Value (USD Million) 2019-2030F; Y-o-Y Growth (%)

2020-2030F

12.5.3. Public Sector and Utilities, By Value (USD Million) 2019-2030F; Y-o-Y Growth (%) 2020-2030F

12.5.4. Healthcare, By Value (USD Million) 2019-2030F; Y-o-Y Growth (%)

2020-2030F

12.5.5. Education, By Value (USD Million) 2019-2030F; Y-o-Y Growth (%) 2020-2030F

12.5.6. Manufacturing, By Value (USD Million) 2019-2030F; Y-o-Y Growth (%)

2020-2030F

12.5.7. Retail, By Value (USD Million) 2019-2030F; Y-o-Y Growth (%) 2020-2030F

12.5.8. Others, By Value (USD Million) 2019-2030F; Y-o-Y Growth (%) 2020-2030F

13. COMPANY PROFILE

1. ORACLE CORPORATION

1. COMPANY OVERVIEW

2. COMPANY TOTAL REVENUE (FINANCIALS)

3. MARKET POTENTIAL

4. GLOBAL PRESENCE

5. KEY PERFORMANCE INDICATORS

6. SWOT ANALYSIS

7. PRODUCT LAUNCH

2. SAILPOINT TECHNOLOGIES HOLDINGS, INC.

3. CENTRIFY CORPORATION

4. DELL INC.

5. IBM CORPORATION

6. MICROSOFT CORPORATION

7. FORGEROCK

8. CA TECHNOLOGIES

9. CROSSMATCH

10. GEMALTO

11. IWELCOME

12. OKTA, INC.

13. PING IDENTITY

14. SYMANTEC CORPORATION

Consultant Recommendation

**The above-given segmentations and companies could be subjected to further modification based on in-depth feasibility studies conducted for the final deliverable.

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