

Governance, Risk and Compliance Platform Market Report by Deployment Model (On-Premises, Cloud), Solution (Audit Management, Risk Management, Policy Management, Compliance Management, and Others), Component (Software, Services), Service (Integration, Consulting, Support), End-User (Small Enterprise, Medium Enterprise, Large Enterprise), Industry Vertical (BFSI, Construction and Engineering, Energy and Utilities, Government, Healthcare, Manufacturing, Retail and Consumer Goods, Telecom and IT, Transportation and Logistics, and Others), and Region 2024-2032

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Abstracts

The global governance, risk and compliance platform market size reached US\$ 44.0 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 119.8 Billion by 2032, exhibiting a growth rate (CAGR) of 11.65% during 2024-2032. The growing focus on mitigating risks to protect sensitive data and intellectual property in various sectors, rising number of cyberthreats, and changing regulatory frameworks and compliance requirements are some of the major factors propelling the market.

The governance, risk and compliance (GRC) platform is a comprehensive solution that enables organizations to effectively manage and oversee their operations while ensuring adherence to regulatory requirements and industry standards. It provides better decision-making and more accurate information technology (IT) investments. It

assists in offering a centralized framework for assessing, monitoring, and mitigating risks across various business processes. As it aids in minimizing complexity for managers, and decreasing the costs of multiple installations, the demand for GRC is rising across the globe.

At present, the increasing adoption of GRC, as it enables businesses to maintain consistency in governance and compliance practices across various regions, is bolstering the growth of the market. Besides this, the growing adoption of GRC platforms among organizations for better decision-making is offering a positive market outlook. In line with this, the rising utilization of social media governance to efficiently communicate with clients, staff members, and customers in an organization is propelling the growth of the market. Apart from this, the increasing awareness about data privacy rights and regulations is contributing to the growth of the market. Furthermore, the rising adoption of GRC platforms, as they benefit in identifying the problems even before they occur and centralizing the entire program at one place, is strengthening the growth of the market.

Governance, Risk and Compliance Platform Market Trends/Drivers:

Rising focus on mitigating risks

The rising focus on mitigating risks in various organizations due to the increasing awareness among businesses to safeguard their operations, reputation, and assets, is contributing to the growth of the market. In addition, GRC platforms provide a complete view of risks across the organization and allow for proactive identification and mitigation. Apart from this, these platforms enable enhanced decision-making and effective risk management strategies by centralizing risk assessment, monitoring, and response. Furthermore, this proactive approach minimizes potential vulnerabilities and helps in maintaining overall business continuity. The rising need to mitigate operational risks and enhance decision-making processes is bolstering the growth of the market.

Increasing number of cyberthreats

The increasing number of cyberthreats across the globe is supporting the growth of the market. Moreover, the rising adoption of the GRC platform to protect sensitive data and intellectual property from misuse is propelling the growth of the market. In line with this, GRC platforms integrate cybersecurity practices into the broader risk management framework. Apart from this, these platforms enable organizations to strengthen their defenses and respond promptly to cyber incidents by offering real-time monitoring, threat detection, and incident response capabilities. Furthermore, the comprehensive

nature of GRC platforms ensures that cybersecurity is an integral part of the overall risk management strategy of a business to reduce the chances of data breaches and their associated consequences.

Changing regulatory frameworks

The rising adoption of GRC platforms due to the changing regulatory environment is contributing to the growth of the market. Industries are continuously facing various regulations and compliance requirements. Organizations are navigating these complex frameworks to avoid legal and financial repercussions. Apart from this, GRC platforms offer a unified approach to manage and track compliance efforts and ensure that businesses stay up to date with the latest rules. In line with this, the automation of compliance processes within these platforms streamlines reporting and auditing and reduces the burden of manual tasks while enhancing accuracy and transparency, which is offering a positive market outlook.

Governance, Risk and Compliance Platform Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global governance, risk and compliance platform market report, along with forecasts at the global and regional levels for 2024-2032. Our report has categorized the market based on deployment model, solution, component, service, end-user, and industry vertical.

Breakup by Deployment Model:

On-Premises

Cloud

On-premises represent the largest market segment

The report has provided a detailed breakup and analysis of the market based on the deployment model. This includes on-premises and cloud. According to the report, on-premises represented the largest segment. On-premises deployment refers to the installation and utilization of GRC platforms within the own physical infrastructure of an organization. With an on-premises model, the software is managed internally and provides businesses with direct control over their data and security. This deployment is favored by organizations that prioritize data sovereignty, have strict regulatory requirements, or possess existing infrastructure investments. In addition, the rising adoption of on-premises solutions, as they offer enhanced customization and security, is supporting the growth of the market.

Breakup by Solution:

- Audit Management
- Risk Management
- Policy Management
- Compliance Management
- Others

Compliance management accounts for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the solution. This includes audit management, risk management, policy management, compliance management, and others. According to the report, compliance management represented the largest segment. Compliance management within GRC platforms involves a systematic approach to ensure adherence to relevant regulations, standards, and internal policies. This solution enables organizations to streamline compliance processes by centralizing documentation, tracking, and reporting. It offers tools for creating compliance frameworks, mapping regulatory requirements, and automating compliance assessments. Through real-time monitoring and alerts, compliance management solutions empower businesses to identify potential gaps and deviations promptly. Organizations can demonstrate their commitment to regulatory obligations during audits and investigations by maintaining an audit trail of compliance activities.

Breakup by Component:

- Software
- Services

Software holds the biggest market share

The report has provided a detailed breakup and analysis of the market based on the component. This includes software and services. According to the report, software represented the largest segment. GRC software comprises digital tools and applications that are designed to facilitate the management of governance, risk, and compliance activities. This component offers a unified platform for organizations to centralize data, automate processes, and streamline workflows related to regulatory compliance, risk assessment, and governance practices. GRC software typically includes features, such as data analytics, reporting dashboards, workflow automation, and integration

capabilities with other organizational systems. It allows businesses to proactively identify potential risks, ensure compliance with evolving regulations, and make informed decisions due to its advanced algorithms and real-time monitoring capabilities.

Breakup by Service:

Integration

Consulting

Support

The report has provided a detailed breakup and analysis of the market based on the service. This includes integration, consulting, and support.

Integration involves seamlessly connecting GRC platforms with an existing software ecosystem of an organization. Integration services ensure that the GRC solution interacts with various systems efficiently. This enables smooth data exchange and centralized access and enhances the efficiency of GRC processes.

Consulting services provide expert guidance to organizations seeking to implement GRC solutions effectively. Consultants assess unique requirements, recommend suitable GRC strategies, and assist in tailoring the platform to align with the objectives of an organization. They ensure that the GRC platform is configured to address specific risks within the industry.

Support services comprise ongoing assistance for GRC platforms. This includes technical support, troubleshooting, and updates to ensure that the platform operates optimally. Reliable support services are crucial for maintaining the functionality and security of the GRC solution and addressing any issues promptly to minimize disruptions.

Breakup by End-User:

Small Enterprise

Medium Enterprise

Large Enterprise

Medium enterprise dominates the market share

The report has provided a detailed breakup and analysis of the market based on the

end-user. This includes small enterprise, medium enterprise, and large enterprise. According to the report, medium enterprise represented the largest segment. Medium enterprises are organizations with a moderate scale of operations and employee count. These enterprises often require efficient GRC solutions to navigate risk management challenges effectively. GRC platforms tailored for medium enterprises offer a balance between comprehensive functionality and scalability and address the specific needs of this segment. These solutions assist medium enterprises in consolidating compliance efforts, mitigating risks, and establishing robust governance practices. In addition, GRC platforms catered to this segment provide a cost-effective way to manage these complexities.

Breakup by Industry Vertical:

BFSI

Construction and Engineering

Energy and Utilities

Government

Healthcare

Manufacturing

Retail and Consumer Goods

Telecom and IT

Transportation and Logistics

Others

BFSI represents the biggest market segment

The report has provided a detailed breakup and analysis of the market based on the industry vertical. This includes BFSI, construction and engineering, energy and utilities, government, healthcare, manufacturing, retail and consumer goods, telecom and IT, transportation and logistics, and others. According to the report, BFSI represented the largest segment. The BFSI industry relies on GRC platforms to manage risks, ensure compliance, and maintain ethical practices. GRC solutions tailored for BFSI offer specialized modules to address unique challenges, such as anti-money laundering (AML) regulations, data privacy, and financial reporting standards in the industry. These platforms enable financial institutions to streamline regulatory reporting, monitor transactions for suspicious activities, and enhance customer data protection. GRC platforms are essential tools for mitigating risks, ensuring transparency, and maintaining the reputation of the BFSI sector.

Breakup by Region:

North America

Europe

Asia Pacific

Middle East and Africa

Latin America

North America exhibits a clear dominance, accounting for the largest governance, risk and compliance platform market share

The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America, Asia Pacific, Europe, the Middle East and Africa, and Latin America. According to the report, North America accounted for the largest market share.

North America held the biggest market share due to the rising demand for GRC platforms to manage risks and ensure ethical practices. Moreover, the growing adoption of integrated data platforms by financial services is offering a positive market outlook. Apart from this, the rising demand for risk management solutions for fraud detection is contributing to the growth of the market. In addition, the increasing employment of GRC in financial institutions to streamline the financial data and gather useful insights is propelling the growth of the market.

Competitive Landscape:

Major manufacturers are continuously developing and enhancing their solutions to keep up with evolving regulatory landscapes and emerging risks. They are integrating advanced technologies, such as artificial intelligence (AI) and machine learning (ML), to provide predictive analytics and real-time monitoring and enable businesses to proactively identify potential risks and compliance gaps. In addition, companies are creating specialized GRC solutions tailored to specific industries to address the unique compliance requirements of various sectors. This approach ensures that organizations can effectively manage sector-specific risks and adhere to industry regulations. Apart from this, key players are working to ensure that their solutions can easily connect with enterprise resource planning (ERP), customer relationship management (CRM), and other systems.

The report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

SAS Institute Inc.

IBM Corp

SAP SE

Dell Technologies

Microsoft Corporation

Fidelity National Information Services Inc.

Oracle Corporation

Thomson Reuters Corporation

Newport Consulting Group, LLC

BWise BV

Recent Developments:

In 2022, IBM announced its OpenPages with Watson 8.3 (both On-Premises and SaaS) that is an integrated GRC platform that benefits organizations in maintaining risk and compliance initiatives.

In 2021, Microsoft launched Azure Purview, a cloud-native data governance solution to allow businesses of all sizes to manage and govern their on-premises, cloud, and app-based systems.

In 2022, SAP SE and PwC announced a new co-innovation strategy to make sustainability an integral part of standard business operations. The strategy assists in addressing key environmental, social and corporate governance (ESG) business challenges.

Key Questions Answered in This Report

1. What was the size of the global governance, risk and compliance platform market in 2023?
2. What is the expected growth rate of the global governance, risk and compliance platform market during 2024-2032?
3. What are the key factors driving the global governance, risk and compliance platform market?
4. What has been the impact of COVID-19 on the global governance, risk and compliance platform market?
5. What is the breakup of the global governance, risk and compliance platform market based on the deployment model?
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10. What is the breakup of the global governance, risk and compliance platform market based on the industry vertical?
11. What are the key regions in the global governance, risk and compliance platform market?
12. Who are the key players/companies in the global governance, risk and compliance platform market?

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