

RegTech Market Report by Component (Solution, Services), Deployment Mode (Cloud-based, On-premises), Enterprises Size (Large Enterprises, Small and Medium-sized Enterprises), Application (Anti-Money Laundering (AML) and Fraud Management, Regulatory Intelligence, Risk and Compliance Management, Regulatory Reporting, Identity Management), End User (Banks, Insurance Companies, FinTech Firms, IT and Telecom, Public Sector, Energy and Utilities, and Others), and Region 2024-2032

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Abstracts

The global regtech market size reached US\$ 13.2 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 65.7 Billion by 2032, exhibiting a growth rate (CAGR) of 18.9% during 2024-2032. The growing occurrence of fraudulent activities like money laundering and phishing, rising adoption of online payment modes, and increasing collaboration between national regulators and financial institutions are some of the major factors driving the RegTech market.

RegTech relies on cloud computing technology through software-as-a-service (SaaS) to help businesses comply with regulations efficiently. It helps in regulatory monitoring, reporting, and compliance and provides various tools to examine online transactions in real-time to identify issues or irregularities in the digital payment sphere. It automates a wide variety of projects, including employee surveillance, compliance data management, fraud prevention, and audit trail capabilities. Furthermore, it allows

companies to save time, money and resources that were once devoted to regulatory compliance for being diverted elsewhere.

At present, the increasing demand for RegTech services as they improve risk management and provide enhanced data analysis capabilities is propelling the growth of the market. Besides this, the rising occurrence of fraudulent activities, such as money laundering and phishing, illegal transactions, and theft of money from other account holders, are contributing to the growth of the market. In addition, the growing adoption of online shopping methods to purchase products and services, along with the increasing emergence of e-commerce brands selling a wide range of products and delivering them to the doorstep of buyers, is offering a favorable market outlook. Apart from this, the rising employment of RegTech to manage issues brought on by the digitization of processes and to allow monetary authorities to gain deeper insights and understand competition dynamics is supporting the growth of the market. Moreover, the increasing collaboration between national regulators and financial institutions is bolstering the growth of the market.

RegTech Market Trends/Drivers:

Rapid adoption of cloud computing solutions is propelling the market growth

Cloud computing refers to the on-demand delivery of various information technology (IT) resources over the Internet with pay-as-you-go pricing. It enables businesses to hire and pay for a selective number of tools and resources to manage their operations and maintain an entire infrastructure. It helps companies enhance their operational efficiency, reduce maintenance costs, and improve the productivity of their employees. It also allows organizations to store massive amounts of data and streamline operations efficiently. Cloud computing offers spontaneous software updates and integration. It integrates common DevOps tools and logging systems, which makes it easier to monitor and detect complications in various production procedures.

Rising adoption of online payment methods is driving the demand for RegTech

Online payment methods and online payment gateways provide seamless experience to individuals while paying for goods and services. They are convenient and enable individuals to make cashless payments while shopping online. They also provide various offers and cashback features, which is encouraging more people to adopt online payment gateways. The accelerated digital transformation of payment transaction processing is impelling banks to deliver innovative payment tools to their customers.

This, along with the changing regulatory landscape due to increasing volumes of online payments, is positively influencing the demand for RegTech services. These services efficiently solve compliance and regulatory complications faced by banks. It also enables banks to use emerging technologies to automate various crucial tasks and improve the payment experience of their customers.

Increasing digital transformation of processes in the banking, financial services, and insurance (BFSI) sector is impacting the overall market

The BFSI sector plays a quintessential role in enhancing the economy of a nation. Hence it is important for this sector to continuously evolve and transform according to the current requirements. Digital transformation is a necessary step for the BFSI sector to enable individuals to make simpler, spontaneous, and secured transactions. It also enables the BFSI sector to present various personalized services to customers along with tailor-made investment and insurance options that suit the income range. Moreover, BFSI digital transformation can resolve customer issues and queries much faster as data is centralized and can be accessed from any branch of financial institutions.

RegTech Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global RegTech market report, along with forecasts at the global, regional, and country levels from 2024-2032. Our report has categorized the market based on component, deployment mode, enterprises size, application, and end user.

Breakup by Component:

Solution

Services

RegTech solutions represent the most popular component

The report has provided a detailed breakup and analysis of the RegTech market based on the component. This includes solution and services. According to the report, solutions represented the largest segment. RegTech solutions manage regulatory processes and operations, such as compliance, reporting, and monitoring by leveraging

high-end technologies and tools. They are utilized by private and public sector companies to avoid the ever-increasing costs associated with regulatory compliance and continually evolving and over-complicated regulations at national and international levels.

Services are bifurcated into professional services and managed services, wherein professional services are provided to organizations, and managed services are the practice of outsourcing the responsibility for improving operations. It allows companies to reduce various infrastructure maintenance costs and increase their overall productivity. Furthermore, availing RegTech services enables businesses to outsource their regulatory challenges to third-party service providers and focus on areas that require more planning and better execution.

Breakup by Deployment Mode:

Cloud-based

On-premises

On-premises hold the largest market share

A detailed breakup and analysis of the RegTech market based on the deployment mode has also been provided in the report. This includes cloud-based and on-premises. According to the report, on-premises accounted for the largest market share. The main factors that are driving the growth of this segment are the growing digitization of business operations and the demand for full control over resources. On-premises offers more security in the area of data protection and low latency and provides complete control of resources, services, and data to the organization. It also offers an ample number of customizations according to specific requirements and access to servers and hardware.

Cloud-based services refer to infrastructure, platforms, or software that are hosted by third-party providers and made available to users through the Internet. They provide access to tools and services anywhere from any device, along with centralized data security. They also present business continuity and the spontaneous application of various regulations required for enhancing overall operations. Cloud-based solutions can also reduce the energy consumption and carbon footprint of companies by eliminating the requirement for in-house servers and software.

Breakup by Enterprises Size:

Large Enterprises

Small and Medium-sized Enterprises

Large enterprises account for the majority of the global market share

A detailed breakup and analysis of the RegTech market based on the enterprise size has also been provided in the report. This includes large enterprises, and small and medium-sized enterprises. According to the report, large enterprises accounted for the largest market share. As large enterprises deal with a huge amount of data, it is difficult for them to efficiently manage and track information. RegTech firms help large enterprises with their regulatory compliance obligations, improving efficiency, reducing risks, and enhancing user experience. They enable large enterprises to focus on enhancing their customer experience by providing the correct set of tools equipped with modern technology, such as artificial intelligence (AI), machine learning (ML), and the Internet of Things (IoT).

Small and medium-sized enterprises (SMEs) require RegTech solutions as they assist in reducing various expenses associated with infrastructure management and maintenance. RegTech enables SMEs to focus on areas that require better management and execution of processes and outsource the regulatory procedures to third-party service providers.

Breakup by Application:

Anti-Money Laundering (AML) and Fraud Management

Regulatory Intelligence

Risk and Compliance Management

Regulatory Reporting

Identity Management

Risk and compliance management exhibits a clear dominance in the market

A detailed breakup and analysis of the RegTech market based on the application has also been provided in the report. This includes anti-money laundering (AML) and fraud management, regulatory intelligence, risk and compliance management, regulatory reporting and identity management. According to the report, risk and compliance management accounted for the largest market share.

The main factors that are driving the growth of this segment are the rising number of cybersecurity breaches and fraudulent activities associated with finances. Risk and compliance management involves the identification of financial losses or legal penalties, calculating the uncertainties, and predicting their impact, consequently giving organizations a basis upon which they can make decisions.

AML and fraud management involve the utilization of deception and dishonesty to generate illegal proceeds. RegTech plays a crucial role in AML and fraud detection, as it confirms the identity of the user and flags any suspicious activity, both during the onboarding and transaction stages.

Regulatory intelligence is the process that keeps businesses aware of and adaptable to changes as they arise. It enables enterprises to access regulatory insights and real-time information, and updates from national authorities across the globe. RegTech utilizes highly advanced tools to scan, scrape, and enrich content, helping businesses understand and manage regulatory risks.

Breakup by End User:

Banks

Insurance Companies

FinTech Firms

IT and Telecom

Public Sector

Energy and Utilities

Others

RegTech is widely utilized in banks around the world

A detailed breakup and analysis of the RegTech market based on the end user has also been provided in the report. This includes banks, insurance companies, FinTech firms, IT and telecom, public sector, energy and utilities, and others. According to the report, banks accounted for the largest market share. Banks utilize RegTech solutions for multiple purposes, including maintenance of transactional security, compliance management, and prevention of phishing and other fraudulent activities. They also utilize RegTech services to predict potential risk areas and access analytics tools that are required for staying successfully compliant with regulatory bodies.

Insurance companies employ RegTech services to present tailor-made or customized services to their targeted customer. It allows insurance company compliance professionals to work over and around legacy infrastructure impediments to connect and analyze information more smartly and understand where the organization may have risk and exposure based on a larger data population that was previously accessible.

Other than that, FinTech firms, IT and telecom, the public sector, energy and utilities, and various other industries employ RegTech services for managing numerous regulatory processes.

Breakup by Region:

North America

United States

Canada

Asia-Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

North America exhibits a clear dominance, accounting for the largest RegTech market share

The report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and Others); and the Middle East and Africa. According to the report, North America was the largest market for RegTech.

North America held the biggest market share due to the presence of a high degree of regulatory complexity in sectors, such as finance and healthcare. Financial institutions in North America are investing in RegTech solutions to minimize compliance costs by using sophisticated technologies, such as artificial intelligence (AI), machine learning (ML), blockchain technology, and big data.

Asia Pacific is estimated to expand in this domain during the forecast period owing to the growing adoption of innovative technologies, rising emergence of domestic businesses, and increasing investments in digital transformation.

Competitive Landscape:

The key market players in the global RegTech market are tackling excessive demand from various enterprises due to the rising occurrence of cybersecurity breaches. They are also focusing on mergers and acquisitions to expand their business. Leading companies are improvising their services by integrating various sophisticated technologies, such as artificial intelligence (AI) and machine learning (ML), to provide real-time information about compliance management. They are also providing efficient solutions for firms to interact with regulators, helping them with new business models. Furthermore, key RegTech providers are taking the GDPR into account and are expected to make the required changes.

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

ACTICO GmbH

Acuant Inc.

Ascent

Broadridge Financial Solutions Inc.

ComplyAdvantage

Deloitte Touche Tohmatsu Limited

International Business Machines Corporation

Jumio

London Stock Exchange Group plc

MetricStream Inc.

NICE Ltd.

PricewaterhouseCoopers

Thomson Reuters Corporation

Trulioo

Wolters Kluwer N.V.

Recent Developments:

In March 2020, MetricStream expanded its operations in Asia-Pacific to accelerate its growth. It enabled the company to cater to Asian clients with its governance, risk, and compliance (GRC) products and solutions.

In July 2020, Ascent and IBM integrated AI RegTech solutions to assist financial institutions in streamlining their compliance operations efficiently.

In January 2022, Jumio, which develops AI-powered identity verification solutions, declared its acquisition of data marketplace 4Stop.

Key Questions Answered in This Report

1. How big is the RegTech market?
2. What is the expected growth rate of the global RegTech market during 2024-2032?
3. What are the key factors driving the global RegTech market?
4. What has been the impact of COVID-19 on the global RegTech market?
5. What is the breakup of the global RegTech market based on the component?
6. What is the breakup of the global RegTech market based on the deployment mode?
7. What is the breakup of the global RegTech market based on the enterprises size?
8. What is the breakup of the global RegTech market based on the application?
9. What is the breakup of the global RegTech market based on the end user?
10. What are the key regions in the global RegTech market?
11. Who are the key players/companies in the global RegTech market?

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