

eGRC Market by Offering (Solutions and Services), Deployment Mode (On-premises and Cloud), Organization Size, Solution Usage (Internal and External), Business Function, Vertical (BFSI, Healthcare, Manufacturing) and Region - Global Forecast to 2029

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Abstracts

The eGRC market size is projected to grow from USD 18.3 billion in 2024 to USD 34.5 billion by 2029 at a Compound Annual Growth Rate (CAGR) of 13.4% during the forecast period. Beyond direct suppliers, organizations increasingly rely on complex ecosystems of third-party vendors, partners, and service providers. Managing third-party risks involves assessing their compliance, operational integrity, interconnectedness, and potential cascading effects. eGRC platforms with robust vendor risk management capabilities enable organizations to evaluate, monitor, and mitigate risks across their extended supply chains and partner networks.

'By vertical, the BFSI segment accounts for a larger market share.'

BFSI is the primary adopter of eGRC solutions and has been a highly regulated and competitive industry focusing on delivering an enhanced customer experience. The change in operating methods, increased digitalization, and adoption of advanced technologies have increased exposure to different risks. In addition, the need to align with the changing regulatory environment and penalties associated with non-compliance has changed how risk is viewed and managed. Various vendors also offer solutions to help organizations manage corporate compliance-related obligations and risks related to anti-money laundering by deploying a single solution/platform. The banking sector is expected to adopt eGRC solutions to improve business performance, optimize risk-

return outcomes, and reduce compliance costs.

'Large enterprises account for a larger market share by organization size.'

Large enterprises have more than 1,000 employees. The large enterprises segment is projected to account for a larger revenue share in the global eGRC market. Large enterprises increasingly adopt eGRC solutions to streamline and centralize their governance processes. These solutions integrate various functions such as risk management, compliance monitoring, and policy enforcement into a single platform, enabling organizations to manage their regulatory obligations and mitigate risks efficiently. By implementing eGRC solutions, large enterprises can enhance transparency, improve decision-making, and ensure adherence to industry standards and regulations, safeguarding their reputation and improving stakeholder trust. Various vendors in the market offer integrated GRC solutions that enable organizations to quickly adapt to the changing regulatory, economic, and technological environments. These solutions help key decision-makers and leaders by offering the critical information required to balance risk management, cost optimization, and capacity for innovation. SAP is one of the key vendors that cater to large enterprises by offering an integrated GRC solution comprising various modules. Some other vendors in the market are IBM, Wolter Kluwer, and MetricStream.

By region, North America accounts for the highest market size during the forecast period.

North America is projected to lead the eGRC market during the forecast period. The presence of economically and technologically advanced countries such as the US and Canada, the adoption of new and emerging technologies, and the strong financial position of market players are some of the significant factors that help organizations in North America have a competitive edge over others. The eGRC market in North America is experiencing substantial growth and is expected to continue expanding during the forecast period. The US and Canada are expected to contribute significantly to the North American market. The presence of key players such as IBM Corporation, Microsoft Corporation, SAS, ServiceNow, and Oracle Corporation makes it a leading region in the eGRC market. The increasing implementation of cloud adoption, growing data breaches, and other cyber threats also contribute to the region's eGRC market growth.

Breakdown of primaries

The study contains insights from various industry experts, from component suppliers to Tier 1 companies and OEMs. The break-up of the primaries is as follows:

By Company Type: Tier 1 – 35%, Tier 2 – 45%, and Tier 3 – 20%

By Designation: C-level – 40% and Managerial and Other Levels – 60%

By Region: North America – 20%, Europe – 35%, and Asia Pacific – 45%

Major vendors in the EGRC market include IBM (US), Microsoft (US), Oracle (US), SAP (Germany), SAS Institute (US), ServiceNow (US), Thomson Reuters (Canada), FIS (US), Wolters Kluwer (Netherlands), LexisNexis (US), Mphasis (India), MetricStream (US), Riskconnect (US), Navex Global (US), OneTrust (US), Mega International (France), LogicManager (US), Acuity Risk Management (UK), C&F SA (Poland), Allgress (US), GlobalSuite Solutions (Spain), Onspring (US), Optimiso (US), Oxial (Switzerland), ReadNow (Australia), SureCloud (UK), StandardFusion (Canada), Comensure (US), Dynamic GRC (Singapore), LogicGate (US), VComply (US), and SmartSuite (US).

The study includes an in-depth competitive analysis of the key players in the eGRC market, their company profiles, recent developments, and key market strategies.

Research Coverage

The report segments the eGRC market. It forecasts its size by Offering (Solutions and Services), Solution Usage (External and Internal), Business Function (Finance, IT, Operations, and Legal), Deployment Mode (On-premises and Cloud), Organization Size (Large Enterprises and Small and Medium Enterprises (SMEs)), Vertical (Government, BFSI, Healthcare, Telecommunications, Energy & Utilities, Manufacturing, IT & ITeS, Retail & eCommerce, Transportation & Logistics, and Other Verticals) and Region (North America, Europe, Asia Pacific, Middle East & Africa and Latin America).

The study also includes an in-depth competitive analysis of the market's key players, their company profiles, key observations related to product and business offerings, recent developments, and key market strategies.

Key Benefits of Buying the Report

The report will help the market leaders/new entrants with information on the closest approximations of the revenue numbers for the overall eGRC market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the market pulse and provides information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

Analysis of key drivers (increasing regulatory compliance mandates, rising cybersecurity threats, and rising demand for cloud-based deployment of eGRC systems), restraints (challenges in adapting to changing laws and regulations), opportunities (integration of AI/ML and blockchain technologies in GRC solutions and integration of eGRC with core business operations), and challenges (the gap between a company's culture and its eGRC framework and provision of comprehensive eGRC solutions)

Product Development/Innovation: Detailed insights on upcoming technologies, research development activities, new products, and service launches in the eGRC market.

Market Development: Comprehensive information about lucrative markets – the report analyses the eGRC market across varied regions.

Market Diversification: Exhaustive information about new products and services, untapped geographies, recent developments, and investments in the eGRC market.

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players IBM (US), Microsoft (US), Oracle (US), SAP (Germany), SAS Institute (US), ServiceNow (US), Thomson Reuters (Canada), FIS (US), Wolters Kluwer (Netherlands), LexisNexis (US), Mphasis (India), MetricStream (US), Riskconnect (US), Navex Global (US), OneTrust (US), Mega International (France), LogicManager (US), Acuity Risk Management (UK), C&F SA (Poland), Allgress (US), GlobalSuite Solutions (Spain), Onspring (US), Optimiso (US), Oxial (Switzerland), ReadNow (Australia), SureCloud (UK), StandardFusion (Canada), Comensure (US), Dynamic GRC (Singapore), LogicGate (US), VComply (US), and SmartSuite (US) among others, in the eGRC market strategies.

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