

eGRC Market by Component (Solutions (Risk Management, Regulatory & Compliance, Audit Management) and Services), Business Function, Vertical (BFSI, Healthcare, Manufacturing), and Region - Global Forecast to 2027

<https://marketpublishers.com/r/EE0749A0821EN.html>

Date: August 2022

Pages: 317

Price: US\$ 4,950.00 (Single User License)

ID: EE0749A0821EN

Abstracts

The global eGRC market size is expected to grow from an estimated value of USD 14.9 billion in 2022 to USD 27.1 billion by 2027, at a Compound Annual Growth Rate (CAGR) of 12.6% from 2022 to 2027. Some of the factors that are driving the market growth include an increase in stringent compliance mandates, integration of AI, ML, and blockchain technologies in GRC solutions, and growth in data and security breaches. However, varying structures of regulatory policies are expected to hinder market growth.

By Solutions, Risk management to account for a larger market size during the forecast period

Risk management solutions include incident management, IT risk, operational risk, vendor risk/third-party risk, cyber risk, business continuity management, and disaster recovery. Risk management solutions are expected to grow at the highest CAGR during the forecast period. The execution of risk management strategies is very important for SMEs and large organizations. Due to the increasing complexities in business, it is very important for organizations to enable risk management solutions to understand their risk exposure and manage it cost-effectively. Risk management solutions when integrated with advanced machine learning technology prioritize various events and enable users to concentrate on alerts and events. The growth in Risk management solutions is high due to various factors including IT risks, operation risks, financial risks, etc., this is due to increasing incidents of cyber-attacks on enterprises.

By Organization, SMEs is projected to grow CAGR during the forecast period

SMEs are adopting eGRC solutions at a high pace to enhance their governance, risk, and compliance programs. To help SMEs meet various regulatory requirements, vendors in the market have been rolling eGRC solutions with the intent to cater to SMEs. These SMEs are also facing pressure related to transparency, visibility, and accountability in their business operations, thus creating an increase in the effectiveness of corporate governance. SMEs face challenges, such as limited resources, IT personnel availability, and enterprise security budget. Additionally, the increase in the focus of SMEs toward digitalization creates threats related to business information and critical data. Hence, to help organizations fight against various cyber threats and challenges, eGRC solution providers deliver innovative solutions to support them in securing their businesses from cyber threats and attacks, implement their GRC program, and gain a competitive advantage.

By business function, the finance segment to account for a larger market size during the forecast period.

Organizations across industries are focusing on enhancing their financial performance. Businesses are working on enhancing their global presence, monitoring and following various regulatory requirements of that particular region. These requirements may include various laws related to taxation, rules related to the allocation of CSR activities, and regional standard formats or templates necessary to document quarterly financial statements. Hence, to help organizations meet the requirements of their finance domain, eGRC vendors offer financial solutions to support business leaders in strategic planning, budgeting, and forecasting. Moreover, the finance function is changing the way it operates due to the increase in complexity of business operations. It is an organization's vital internal function that has to comply with various norms, such as Sarbanes-Oxley, Basel II, Solvency II, and Dodd-Frank.

Breakdown of primaries:

In-depth interviews were conducted with Chief Executive Officers (CEOs), marketing directors, other innovation and technology directors, and executives from various key organizations operating in the eGRC market.

By company type: Tier 1: 35%, Tier 2: 45%, and Tier 3: 20%

By designation: C-level: 40%, Managerial and other levels: 60%

By region: North America: 20%, Europe: 35%, APAC: 45%

Major vendors in the global eGRC market include IBM (US), Microsoft (US), SAP (Germany), SAS Institute (US), ServiceNow (US), Thomson Reuters (Canada), Wolters Kluwer (Netherlands), FIS (USA), Software AG (Germany), MetricStream (US), Mphasis (India), Sai Global (US), LexisNexis (US), Diligent Corporation (US), OneTrust (US), Navex Global (US), RSA Security (US), Mega International (France), Ideagen (UK), LogicManager (US), Riskconnect (US), Allgress Inc (US), CammsGroup (Australia), LogicGate(US), Reciprocity (US), SureCloud (UK), ProcessGene (Israel), Lexcomply (India), StandardFusion (Canada), Comensure (US), DynamicGRC(Singapore), and VComply (US).

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

Research coverage

The report segment the eGRC market and forecast its size, by Components (Solutions and Services), Deployment Mode (On-Premises and Cloud), Organization Size (SMEs and Large Enterprises), Verticals (Banking and financial institutions, telecommunications, energy and utilities, healthcare, government, manufacturing, IT, retail, transportation and logistics, and other verticals), Business function (Finance, IT, Legal, Operations), Solutions (risk management, regulatory & compliance, and audit management) and Region (North America, Europe, APAC, MEA, and Latin America).

The study also includes an in-depth competitive analysis of the key players in the market, along with 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 in this market 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 pulse of the market and provides them with information on key market drivers, restraints, challenges,

and opportunities.

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About

Enterprise governance, risk management and compliance (eGRC) has become critical to business management. To facilitate performance enhancement measures, enterprises have started using GRC data. The idea that GRC can be a progressive business management tool is gradually becoming more acknowledged. Businesses are expected to get in the benefits of adopting GRC in an organized, designed manner.

The eGRC market is fast gaining traction which is evident from the acquisitions of BWISE by NASDAQ OMX, Compliance 360 by SAI Global, OpenPages by IBM and TruArx by ANXeBusiness. Key players such as Microsoft, SAP and SAS offer eGRC products and solutions for enterprises, and SMBs.

There are many small players such as Halex Business Risk Services and others that provide eGRC advisory services to businesses.

This report analyzes global adoption trends, future growth potential, key drivers, restraints, opportunities, and best practices in the eGRC market. The report also examines growth potential market sizes and revenue forecasts across different regions as well as industry verticals.

eGRC has become crucial for seamless running of businesses across the globe. This is evident from the performance gains, improved compliance, reduced costs, and other benefits derived out of the GRC initiatives, and the technologies undertaken by companies worldwide.

Risk management is a vital part of the core GRC functions and the progression from qualitative risk management to quantitative analysis is a challenge that most of the organizations face. Companies will need to shift risk processes towards more quantitative methods. It is expected that companies will take up more numerical models in order to improve their ability to address risk management issues more effectively.

The data generated from the GRC initiatives adopted by companies is valuable intrinsically and provide insight into the future. Companies often face complexity in constructing a proper repository to mine and analyze this data. However, enterprises are expected to start utilizing GRC data to facilitate performance improvement activities. It is expected that companies will enable the processes for the data mining, analytical and modeling capabilities required to facilitate process re-engineering, process

improvement, and performance gains.

The trend of GRC emerging as a core business management need is expected to gain traction in the market. Governance processes, risk management programs, and compliance initiatives, supported by GRC technology infrastructure, will become part of business management.

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