

Human Capital Management Market by Offering (Software (Core HR, ATS, HR Analytics, and Workforce Management) and Services), Deployment Model, Organization Size, Vertical (BFSI, Manufacturing, IT & Telecom, Government) & Region - Global Forecast to 2029

<https://marketpublishers.com/r/H06D03A2826EN.html>

Date: April 2024

Pages: 295

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

ID: H06D03A2826EN

Abstracts

The HCM market is expected to grow from USD 27.5 billion in 2024 to USD 41.3 billion by 2029 at a Compound Annual Growth Rate (CAGR) of 8.5% during the forecast period. The HCM market is undergoing a rapid evolution spurred by several key factors. Technological advancements have revolutionized traditional HR practices, with cloud-based solutions, AI, and analytics driving efficiency and insight. In addition, globalization has necessitated the need for scalable and adaptable HCM platforms that can support diverse workforces across various geographical locations. Moreover, the growing emphasis on talent management, employee engagement, and workforce optimization has reshaped the priorities within the HCM landscape, prompting a shift towards more holistic and integrated solutions.

'As per the organization size, SMEs are expected to grow at the second highest CAGR during the forecast period. '

The employee count of SMEs generally ranges between 1 and 1,000. Small capital, less complex environment, and low integration with advanced technologies affect the adoption of HCM in SMEs. SMEs face specific challenges, such as domain-specific personnel and skilled workforce requirements, budget constraints, and limited economies of scale. Tier 2 and tier 3 HCM providers mainly serve them. To make well-informed decisions for their business growth, SMEs have been forced to invest in HCM

software and adopt go-to-market strategies due to increased attrition rates, expensive recruitment expenses, and a competitive market. Because of their budget constraints and requirement for scalable, practical solutions, small and medium-sized enterprises (SMEs) face particular HR issues. HCM providers catering to SMEs provide comprehensive HR software tailored to their needs. These solutions streamline essential HR processes such as payroll, recruitment, attendance tracking, and performance management, enabling SMEs to manage their workforce effectively. By leveraging HCM software, SMEs can enhance employee engagement, ensure compliance with labor regulations, and drive business growth. Providers like HROne and CBIZ offer customizable and cost-effective HCM solutions to help SMEs optimize their HR operations and foster organizational success.

'As per the software, CoreHR is expected to hold the highest market share during the forecast period. '

CoreHR software forms the foundational element of HCM systems, encompassing essential HR functions and processes. This software typically includes features such as employee data management, payroll processing, benefits administration, and compliance management. It is a centralized repository for critical HR information, enabling organizations to efficiently manage employee records, track personnel movements, and administer compensation and benefits packages. CoreHR software streamlines routine HR tasks, enhances data accuracy and ensures compliance with regulatory requirements. Moreover, it facilitates seamless communication between HR departments and employees, enabling self-service functionalities such as accessing pay stubs, updating personal information, and requesting time off. As the backbone of HCM systems, CoreHR software lays the groundwork for effective talent management, workforce planning, and strategic decision-making, contributing to overall operational excellence and employee satisfaction.

'As per vertical, the healthcare & life sciences vertical will grow at the second highest CAGR in 2024. '

In Healthcare and Life Sciences, HCM encompasses strategies and processes to effectively manage and optimize the workforce for optimal patient care and organizational success. Verisys is a leading provider contributing to HCM in Healthcare and Life Sciences by offering advanced compliance and data management solutions. Their suite of services, including FACIS® for Compliance and Safety and credentialing and provider data management, ensures regulatory compliance, streamlines onboarding processes, and enhances workforce efficiency across diverse healthcare

markets. Oracle is another notable Healthcare and Life Sciences provider, offering comprehensive HCM solutions tailored to industry-specific needs. With features like Oracle Recruiting and Oracle Journeys, Oracle enables organizations to find specialized talent efficiently, enhance employee engagement, and align people plans with product lifecycles. Their advanced HCM controls ensure data security and compliance, empowering healthcare organizations to optimize workforce management and drive organizational success.

The breakup of the profiles of the primary participants is below:

By Company: Tier I: 48%, Tier II: 37%, and Tier III: 15%

By Designation: C-Level Executives: 40%, Director Level: 34%, and Others: 26%

By Region: North America: 42%, Europe: 31%, Asia Pacific: 16%, Rest of World: 11%

Note: Others include sales managers, marketing managers, and product managers

Note: The rest of the World consists of the Middle East & Africa, and Latin America

Note: Tier 1 companies have revenues of more than USD 100 million; tier 2 companies' revenue ranges from USD 10 million to USD 100 million; and tier 3 companies' revenue is less than 10 million

Source: Secondary Literature, Expert Interviews, and MarketsandMarkets Analysis

Some of the significant vendors offering HCM software across the globe include.

Workday (US), UKG (US), Oracle (US), SAP (Germany), Dayforce (US), ADP (US), Paylocity (US), Paycom (US), Cornerstone (US), and Microsoft (US).

Research coverage:

The HCM market is covered by the market study in all its segments. This study evaluates the market's size and growth potential in various market segments, including offering, deployment model, organization size, vertical, and geography. It contains a

thorough competition analysis of the major market participants, company biographies, important insights regarding their business and product offerings, new developments, and crucial market strategies.

Reasons to buy this report:

With information on the most accurate estimates of revenue figures for the entire HCM market and its subsegments, the research will benefit market leaders and recent newcomers. 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 (as companies engage in the ongoing 'war for talent,' HCM solutions emerge as essential tools, offering streamlined recruitment processes, comprehensive workforce management, and personalized employee engagement strategies), restraints (security concerns over cloud-based deployment), opportunities (integration of AI-driven analytics into HCM systems heralds a new era of workforce optimization and strategic talent management), and challenges (presence of multiple generations with distinct work styles and communication preferences necessitates adaptable HCM systems to ensure equitable treatment and collaborative efficiency).

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

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

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

Competitive Assessment: In-depth assessment of market shares, growth strategies, and business processes offered in HCM of leading players like Workday (US), UKG (US), Oracle (US), SAP (Germany), Dayforce (US), among

others in the HCM market.

Contents

1 INTRODUCTION

1.1 STUDY OBJECTIVES

1.2 MARKET DEFINITION

1.2.1 INCLUSIONS AND EXCLUSIONS

1.3 STUDY SCOPE

1.3.1 MARKET SEGMENTATION

1.3.2 REGIONS COVERED

1.4 YEARS CONSIDERED

1.5 CURRENCY CONSIDERED

TABLE 1 USD EXCHANGE RATES, 2019–2023

1.6 STAKEHOLDERS

1.7 SUMMARY OF CHANGES

1.7.1 IMPACT OF RECESSION

2 RESEARCH METHODOLOGY

2.1 RESEARCH DATA

FIGURE 1 HUMAN CAPITAL MANAGEMENT MARKET: RESEARCH DESIGN

2.1.1 SECONDARY DATA

2.1.2 PRIMARY DATA

2.1.2.1 Breakup of primary profiles

2.1.2.2 Key insights from industry experts

2.2 DATA TRIANGULATION

FIGURE 2 HUMAN CAPITAL MANAGEMENT MARKET: DATA TRIANGULATION

2.3 MARKET SIZE ESTIMATION

FIGURE 3 HUMAN CAPITAL MANAGEMENT MARKET: TOP-DOWN AND BOTTOM-UP APPROACHES

2.3.1 TOP-DOWN APPROACH

FIGURE 4 MARKET SIZE ESTIMATION METHODOLOGY: TOP-DOWN APPROACH

2.3.2 BOTTOM-UP APPROACH

FIGURE 5 MARKET SIZE ESTIMATION METHODOLOGY: BOTTOM-UP APPROACH

FIGURE 6 HUMAN CAPITAL MANAGEMENT MARKET: RESEARCH FLOW

FIGURE 7 MARKET SIZE ESTIMATION METHODOLOGY: SUPPLY-SIDE ANALYSIS

FIGURE 8 MARKET SIZE ESTIMATION METHODOLOGY: BOTTOM-UP APPROACH FROM SUPPLY SIDE - COLLECTIVE REVENUE OF VENDORS

FIGURE 9 MARKET SIZE ESTIMATION METHODOLOGY – (SUPPLY SIDE): CAGR

PROJECTIONS FROM SUPPLY SIDE

FIGURE 10 DEMAND-SIDE APPROACH: HUMAN CAPITAL MANAGEMENT MARKET

2.4 MARKET FORECAST

TABLE 2 FACTOR ANALYSIS

2.5 IMPACT OF RECESSION ON GLOBAL HUMAN CAPITAL MANAGEMENT MARKET

2.6 RESEARCH ASSUMPTIONS

2.7 LIMITATIONS

3 EXECUTIVE SUMMARY

TABLE 3 HUMAN CAPITAL MANAGEMENT MARKET SIZE AND GROWTH, 2019–2023 (USD MILLION, Y-O-Y)

TABLE 4 HUMAN CAPITAL MANAGEMENT MARKET SIZE AND GROWTH, 2024–2029 (USD MILLION, Y-O-Y)

FIGURE 11 GLOBAL HUMAN CAPITAL MANAGEMENT MARKET TO WITNESS SIGNIFICANT GROWTH, 2019–2029

FIGURE 12 FASTEST-GROWING SEGMENTS IN HUMAN CAPITAL MANAGEMENT MARKET, 2024–2029

FIGURE 13 HUMAN CAPITAL MANAGEMENT MARKET: REGIONAL SNAPSHOT

4 PREMIUM INSIGHTS

4.1 OVERVIEW OF HUMAN CAPITAL MANAGEMENT MARKET

FIGURE 14 SHIFT TOWARD MOBILE-CENTRIC USAGE AND NEED FOR UPDATED HRIS SOFTWARE TO DRIVE MARKET

4.2 HUMAN CAPITAL MANAGEMENT MARKET, BY OFFERING

FIGURE 15 SOFTWARE SEGMENT TO ACCOUNT FOR LARGER MARKET SHARE DURING FORECAST PERIOD

4.3 HUMAN CAPITAL MANAGEMENT MARKET, BY SOFTWARE

FIGURE 16 CORE HR SEGMENT TO ACCOUNT FOR LARGEST MARKET SHARE DURING FORECAST PERIOD

4.4 HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE

FIGURE 17 PROFESSIONAL SERVICES SEGMENT TO ACCOUNT FOR LARGER MARKET SHARE DURING FORECAST PERIOD

4.5 HUMAN CAPITAL MANAGEMENT MARKET, BY DEPLOYMENT MODEL

FIGURE 18 CLOUD SEGMENT TO ACCOUNT FOR LARGER MARKET SHARE DURING FORECAST PERIOD

4.6 HUMAN CAPITAL MANAGEMENT MARKET, BY ORGANIZATION SIZE

FIGURE 19 LARGE ENTERPRISES TO ACCOUNT FOR LARGER MARKET SHARE DURING FORECAST PERIOD

4.7 HUMAN CAPITAL MANAGEMENT MARKET, BY VERTICAL

FIGURE 20 BFSI VERTICAL TO ACCOUNT FOR LARGEST MARKET SHARE DURING FORECAST PERIOD

4.8 HUMAN CAPITAL MANAGEMENT MARKET: REGIONAL SCENARIO

FIGURE 21 ASIA PACIFIC TO EMERGE AS BEST MARKET FOR INVESTMENT IN NEXT FIVE YEARS

5 MARKET OVERVIEW AND INDUSTRY TRENDS

5.1 INTRODUCTION

5.2 MARKET DYNAMICS

FIGURE 22 DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES: HUMAN CAPITAL MANAGEMENT MARKET

5.2.1 DRIVERS

- 5.2.1.1 High demand for talent attraction and retention
- 5.2.1.2 Requirement for unified HR systems
- 5.2.1.3 Need for adherence to compliance and labor laws
- 5.2.1.4 Performance enhancement fueling organizational success through HCM
- 5.2.1.5 Integration of AI and ML in HCM suites

5.2.2 RESTRAINTS

- 5.2.2.1 Security concerns over cloud-based deployment

5.2.3 OPPORTUNITIES

- 5.2.3.1 Cloud ecosystem improves HCM scalability and integration
- 5.2.3.2 Increasing demand for AI-driven analytics in organizations
- 5.2.3.3 Implementation of remote working models

5.2.4 CHALLENGES

- 5.2.4.1 Complex workforce dynamics
- 5.2.4.2 Intricacy of technical integration and high cost of implementation

5.3 CASE STUDY ANALYSIS

5.3.1 PAYLOCITY HELPED WATTERS INTERNATIONAL REALTY FIRM SAVE TIME AND MONEY AND ENABLE AGENTS TO MANAGE INFORMATION INDEPENDENTLY

5.3.2 FAST-FOOD FRANCHISE SAVED MONEY IN ANNUAL FEDERAL TAX CREDITS BY DEPLOYING PAYCOM'S TAX CREDITS SOFTWARE

5.3.3 PUMA ENHANCED ITS ORGANIZATIONAL CULTURE, COMPETITIVENESS, AND COMPETENCE AFTER DEPLOYING WORKDAY HCM SOLUTIONS

5.3.4 FEEDING AMERICA INCREASED OPERATIONAL EFFICIENCY WITH HELP

OF UKG PRO

5.3.5 AMERICAN CEDAR & MILLWORK ACHIEVED OPTIMIZED WORKFORCE MANAGEMENT BY IMPLEMENTING BAMBOOHR'S TIME TRACKING

5.3.6 AIDBOTS PROVIDED ITS EMPLOYEES WITH EFFORTLESS TIME TRACKING AND PAID TIME OFF WITH BAMBOOHR

5.4 VALUE CHAIN ANALYSIS

FIGURE 23 HUMAN CAPITAL MANAGEMENT MARKET: VALUE CHAIN ANALYSIS

5.5 ECOSYSTEM/MARKET MAP

FIGURE 24 HUMAN CAPITAL MANAGEMENT MARKET: ECOSYSTEM

5.6 TECHNOLOGY ANALYSIS

5.6.1 KEY TECHNOLOGIES

5.6.1.1 Cloud computing

5.6.1.2 Analytics

5.6.2 COMPLEMENTARY TECHNOLOGIES

5.6.2.1 IoT

5.6.2.2 Data integration tools

5.6.3 ADJACENT TECHNOLOGIES

5.6.3.1 AI

5.6.3.2 ML

5.7 PRICING ANALYSIS

TABLE 5 INDICATIVE PRICING ANALYSIS OF HUMAN CAPITAL MANAGEMENT VENDORS, BY SOFTWARE

5.8 PATENT ANALYSIS

FIGURE 25 NUMBER OF PATENTS PUBLISHED, 2013–2023

FIGURE 26 TOP FIVE PATENT OWNERS (GLOBAL)

TABLE 6 TOP 10 PATENT APPLICANTS (US)

5.9 PORTER'S FIVE FORCES' ANALYSIS

FIGURE 27 HUMAN CAPITAL MANAGEMENT MARKET: PORTER'S FIVE FORCES ANALYSIS

TABLE 7 PORTER'S FIVE FORCES' IMPACT ON HUMAN CAPITAL MANAGEMENT MARKET

5.9.1 THREAT OF NEW ENTRANTS

5.9.2 THREAT OF SUBSTITUTES

5.9.3 BARGAINING POWER OF SUPPLIERS

5.9.4 BARGAINING POWER OF BUYERS

5.9.5 INTENSITY OF COMPETITIVE RIVALRY

5.10 REGULATORY LANDSCAPE

5.10.1 REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 8 NORTH AMERICA: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 9 EUROPE: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 10 ASIA PACIFIC: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 11 REST OF WORLD: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

5.10.2 REGULATIONS

5.11 TRENDS/DISRUPTIONS IMPACTING CUSTOMERS' BUSINESSES

FIGURE 28 HUMAN CAPITAL MANAGEMENT MARKET: TRENDS AND DISRUPTIONS IMPACTING CUSTOMERS' BUSINESSES

5.12 KEY STAKEHOLDERS & BUYING CRITERIA

5.12.1 KEY STAKEHOLDERS IN BUYING PROCESS

FIGURE 29 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR TOP TWO VERTICALS

TABLE 12 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR TOP TWO VERTICALS

5.12.2 BUYING CRITERIA

FIGURE 30 KEY BUYING CRITERIA FOR END USERS

TABLE 13 KEY BUYING CRITERIA FOR END USERS

5.13 BUSINESS MODEL ANALYSIS

FIGURE 31 HUMAN CAPITAL MANAGEMENT MARKET: BUSINESS MODEL ANALYSIS

5.14 KEY CONFERENCES AND EVENTS

TABLE 14 HUMAN CAPITAL MANAGEMENT MARKET: DETAILED LIST OF CONFERENCES AND EVENTS, 2024–2025

5.15 INVESTMENT AND FUNDING SCENARIO

FIGURE 32 INVESTMENT AND FUNDING SCENARIO OF MAJOR HUMAN CAPITAL MANAGEMENT COMPANIES

6 HUMAN CAPITAL MANAGEMENT MARKET, BY OFFERING

6.1 INTRODUCTION

FIGURE 33 SOFTWARE SEGMENT TO HOLD LARGER MARKET DURING FORECAST PERIOD

6.1.1 OFFERINGS: HUMAN CAPITAL MANAGEMENT MARKET DRIVERS

TABLE 15 HUMAN CAPITAL MANAGEMENT MARKET, BY OFFERING, 2019–2023 (USD MILLION)

TABLE 16 HUMAN CAPITAL MANAGEMENT MARKET, BY OFFERING, 2024–2029
(USD MILLION)

6.2 SOFTWARE

FIGURE 34 CORE HR SEGMENT TO HOLD LARGEST MARKET DURING
FORECAST PERIOD

TABLE 17 SOFTWARE: HUMAN CAPITAL MANAGEMENT MARKET, BY REGION,
2019–2023 (USD MILLION)

TABLE 18 SOFTWARE: HUMAN CAPITAL MANAGEMENT MARKET, BY REGION,
2024–2029 (USD MILLION)

TABLE 19 HUMAN CAPITAL MANAGEMENT MARKET, BY SOFTWARE, 2019–2023
(USD MILLION)

TABLE 20 HUMAN CAPITAL MANAGEMENT MARKET, BY SOFTWARE, 2024–2029
(USD MILLION)

6.2.1 CORE HR

TABLE 21 CORE HR: HUMAN CAPITAL MANAGEMENT MARKET, BY REGION,
2019–2023 (USD MILLION)

TABLE 22 CORE HR: HUMAN CAPITAL MANAGEMENT MARKET, BY REGION,
2024–2029 (USD MILLION)

6.2.1.1 Benefits & claims management

6.2.1.2 Payroll & compensation management

6.2.1.3 Personnel management

6.2.1.4 Learning management

6.2.1.5 Pension management

6.2.1.6 Compliance management

6.2.1.7 Other core HR applications

6.2.2 APPLICANT TRACKING SYSTEM

TABLE 23 APPLICANT TRACKING SYSTEM: HUMAN CAPITAL MANAGEMENT
MARKET, BY REGION, 2019–2023 (USD MILLION)

TABLE 24 APPLICANT TRACKING SYSTEM: HUMAN CAPITAL MANAGEMENT
MARKET, BY REGION, 2024–2029 (USD MILLION)

6.2.2.1 Candidate sourcing

6.2.2.2 Candidate screening

6.2.2.3 Application management

6.2.2.4 Interview management

6.2.2.5 Other ATS applications

6.2.3 HR ANALYTICS

TABLE 25 HR ANALYTICS: HUMAN CAPITAL MANAGEMENT MARKET, BY
REGION, 2019–2023 (USD MILLION)

TABLE 26 HR ANALYTICS: HUMAN CAPITAL MANAGEMENT MARKET, BY

REGION, 2024–2029 (USD MILLION)

- 6.2.3.1 People analytics
- 6.2.3.2 HR metrics reporting
- 6.2.3.3 Performance metrics & KPI tracking
- 6.2.3.4 Talent acquisition metrics
- 6.2.3.5 Attrition analytics

6.2.4 WORKFORCE MANAGEMENT**TABLE 27 WORKFORCE MANAGEMENT: HUMAN CAPITAL MANAGEMENT MARKET, BY REGION, 2019–2023 (USD MILLION)****TABLE 28 WORKFORCE MANAGEMENT: HUMAN CAPITAL MANAGEMENT MARKET, BY REGION, 2024–2029 (USD MILLION)**

- 6.2.4.1 Time & attendance management
- 6.2.4.2 Leave & absence management
- 6.2.4.3 Workforce scheduling
- 6.2.4.4 Workforce analytics
- 6.2.4.5 Other workforce management applications

6.3 SERVICES**FIGURE 35 MANAGED SERVICES SEGMENT TO HOLD HIGHER CAGR DURING FORECAST PERIOD****TABLE 29 SERVICES: HUMAN CAPITAL MANAGEMENT MARKET, BY REGION, 2019–2023 (USD MILLION)****TABLE 30 SERVICES: HUMAN CAPITAL MANAGEMENT MARKET, BY REGION, 2024–2029 (USD MILLION)****TABLE 31 HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE, 2019–2023 (USD MILLION)****TABLE 32 HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE, 2024–2029 (USD MILLION)****6.3.1 PROFESSIONAL SERVICES****TABLE 33 PROFESSIONAL SERVICES: HUMAN CAPITAL MANAGEMENT MARKET, BY REGION, 2019–2023 (USD MILLION)****TABLE 34 PROFESSIONAL SERVICES: HUMAN CAPITAL MANAGEMENT MARKET, BY REGION, 2024–2029 (USD MILLION)****TABLE 35 HUMAN CAPITAL MANAGEMENT MARKET, BY PROFESSIONAL SERVICE, 2019–2023 (USD MILLION)****TABLE 36 HUMAN CAPITAL MANAGEMENT MARKET, BY PROFESSIONAL SERVICE, 2024–2029 (USD MILLION)****6.3.1.1 Integration & implementation****TABLE 37 INTEGRATION & IMPLEMENTATION: HUMAN CAPITAL MANAGEMENT MARKET, BY REGION, 2019–2023 (USD MILLION)**

TABLE 38 INTEGRATION & IMPLEMENTATION: HUMAN CAPITAL MANAGEMENT MARKET, BY REGION, 2024–2029 (USD MILLION)**6.3.1.2 Training & education****TABLE 39 TRAINING & EDUCATION: HUMAN CAPITAL MANAGEMENT MARKET, BY REGION, 2019–2023 (USD MILLION)****TABLE 40 TRAINING & EDUCATION: HUMAN CAPITAL MANAGEMENT MARKET, BY REGION, 2024–2029 (USD MILLION)****6.3.1.3 Consulting****TABLE 41 CONSULTING: HUMAN CAPITAL MANAGEMENT MARKET, BY REGION, 2019–2023 (USD MILLION)****TABLE 42 CONSULTING: HUMAN CAPITAL MANAGEMENT MARKET, BY REGION, 2024–2029 (USD MILLION)****6.3.2 MANAGED SERVICES****TABLE 43 MANAGED SERVICES: HUMAN CAPITAL MANAGEMENT MARKET, BY REGION, 2019–2023 (USD MILLION)****TABLE 44 MANAGED SERVICES: HUMAN CAPITAL MANAGEMENT MARKET, BY REGION, 2024–2029 (USD MILLION)****6.3.2.1 Support & maintenance****6.3.2.2 HR outsourcing****6.3.2.3 Payroll processing****7 HUMAN CAPITAL MANAGEMENT MARKET, BY DEPLOYMENT MODEL****7.1 INTRODUCTION****7.1.1 DEPLOYMENT MODELS: HUMAN CAPITAL MANAGEMENT MARKET DRIVERS****TABLE 45 HUMAN CAPITAL MANAGEMENT MARKET, BY DEPLOYMENT MODEL, 2019–2023 (USD MILLION)****TABLE 46 HUMAN CAPITAL MANAGEMENT MARKET, BY DEPLOYMENT MODEL, 2024–2029 (USD MILLION)****7.2 ON-PREMISES****TABLE 47 ON-PREMISES: HUMAN CAPITAL MANAGEMENT MARKET, BY REGION, 2019–2023 (USD MILLION)****TABLE 48 ON-PREMISES: HUMAN CAPITAL MANAGEMENT MARKET, BY REGION, 2024–2029 (USD MILLION)****7.3 CLOUD****TABLE 49 CLOUD: HUMAN CAPITAL MANAGEMENT MARKET, BY REGION, 2019–2023 (USD MILLION)****TABLE 50 CLOUD: HUMAN CAPITAL MANAGEMENT MARKET, BY REGION,**

2024–2029 (USD MILLION)

8 HUMAN CAPITAL MANAGEMENT MARKET, BY ORGANIZATION SIZE

8.1 INTRODUCTION

8.1.1 ORGANIZATION SIZES: HUMAN CAPITAL MANAGEMENT MARKET DRIVERS

TABLE 51 HUMAN CAPITAL MANAGEMENT MARKET, BY ORGANIZATION SIZE, 2019–2023 (USD MILLION)

TABLE 52 HUMAN CAPITAL MANAGEMENT MARKET, BY ORGANIZATION SIZE, 2024–2029 (USD MILLION)

8.2 SMALL AND MEDIUM-SIZED ENTERPRISES

TABLE 53 SMALL AND MEDIUM-SIZED ENTERPRISES: HUMAN CAPITAL MANAGEMENT MARKET, BY REGION, 2019–2023 (USD MILLION)

TABLE 54 SMALL AND MEDIUM-SIZED ENTERPRISES: HUMAN CAPITAL MANAGEMENT MARKET, BY REGION, 2024–2029 (USD MILLION)

8.3 LARGE ENTERPRISES

TABLE 55 LARGE ENTERPRISES: HUMAN CAPITAL MANAGEMENT MARKET, BY REGION, 2019–2023 (USD MILLION)

TABLE 56 LARGE ENTERPRISES: HUMAN CAPITAL MANAGEMENT MARKET, BY REGION, 2024–2029 (USD MILLION)

9 HUMAN CAPITAL MANAGEMENT MARKET, BY VERTICAL

9.1 INTRODUCTION

9.1.1 VERTICALS: HUMAN CAPITAL MANAGEMENT MARKET DRIVERS

TABLE 57 HUMAN CAPITAL MANAGEMENT MARKET, BY VERTICAL, 2019–2023 (USD MILLION)

TABLE 58 HUMAN CAPITAL MANAGEMENT MARKET, BY VERTICAL, 2024–2029 (USD MILLION)

9.2 BFSI

TABLE 59 BFSI: HUMAN CAPITAL MANAGEMENT MARKET, BY REGION, 2019–2023 (USD MILLION)

TABLE 60 BFSI: HUMAN CAPITAL MANAGEMENT MARKET, BY REGION, 2024–2029 (USD MILLION)

9.2.1 BFSI: APPLICATION AREAS

9.2.1.1 Compliance training

9.2.1.2 Fraud prevention

9.2.1.3 Risk management

9.2.1.4 Sales performance management

9.2.1.5 Talent pipelining

9.3 GOVERNMENT

TABLE 61 GOVERNMENT: HUMAN CAPITAL MANAGEMENT MARKET, BY REGION, 2019–2023 (USD MILLION)

TABLE 62 GOVERNMENT: HUMAN CAPITAL MANAGEMENT MARKET, BY REGION, 2024–2029 (USD MILLION)

9.3.1 GOVERNMENT: APPLICATION AREAS

9.3.1.1 Public sector recruitment

9.3.1.2 Workforce diversity & inclusion

9.3.1.3 Civil service classification

9.3.1.4 Public policy training

9.3.1.5 Public health & safety training

9.4 MANUFACTURING

TABLE 63 MANUFACTURING: HUMAN CAPITAL MANAGEMENT MARKET, BY REGION, 2019–2023 (USD MILLION)

TABLE 64 MANUFACTURING: HUMAN CAPITAL MANAGEMENT MARKET, BY REGION, 2024–2029 (USD MILLION)

9.4.1 MANUFACTURING: APPLICATION AREAS

9.4.1.1 Lean manufacturing practices

9.4.1.2 Safety training & compliance

9.4.1.3 Productivity tracking

9.4.1.4 Quality control & assurance training

9.4.1.5 Maintenance workforce management

9.5 IT & TELECOM

TABLE 65 IT & TELECOM: HUMAN CAPITAL MANAGEMENT MARKET, BY REGION, 2019–2023 (USD MILLION)

TABLE 66 IT & TELECOM: HUMAN CAPITAL MANAGEMENT MARKET, BY REGION, 2024–2029 (USD MILLION)

9.5.1 IT & TELECOM: APPLICATION AREAS

9.5.1.1 Customer service training

9.5.1.2 Emerging technologies training

9.5.1.3 Cybersecurity skills development

9.5.1.4 Product launch training

9.5.1.5 Telecom regulatory compliance

9.6 CONSUMER GOODS & RETAIL

TABLE 67 CONSUMER GOODS & RETAIL: HUMAN CAPITAL MANAGEMENT MARKET, BY REGION, 2019–2023 (USD MILLION)

TABLE 68 CONSUMER GOODS & RETAIL: HUMAN CAPITAL MANAGEMENT

MARKET, BY REGION, 2024–2029 (USD MILLION)**9.6.1 CONSUMER GOODS & RETAIL: APPLICATION AREAS**

- 9.6.1.1 Merchandising & inventory management training
- 9.6.1.2 Retail store operations training
- 9.6.1.3 Customer experience training
- 9.6.1.4 Sales performance tracking
- 9.6.1.5 Labor cost management

9.7 HEALTHCARE & LIFE SCIENCES**TABLE 69 HEALTHCARE & LIFE SCIENCES: HUMAN CAPITAL MANAGEMENT MARKET, BY REGION, 2019–2023 (USD MILLION)****TABLE 70 HEALTHCARE & LIFE SCIENCES: HUMAN CAPITAL MANAGEMENT MARKET, BY REGION, 2024–2029 (USD MILLION)****9.7.1 HEALTHCARE & LIFE SCIENCES: APPLICATION AREAS**

- 9.7.1.1 Clinical skill training
- 9.7.1.2 EHR training
- 9.7.1.3 Patient safety training
- 9.7.1.4 Health compliance & ethics training
- 9.7.1.5 Healthcare compliance management

9.8 ENERGY & UTILITIES**TABLE 71 ENERGY & UTILITIES: HUMAN CAPITAL MANAGEMENT MARKET, BY REGION, 2019–2023 (USD MILLION)****TABLE 72 ENERGY & UTILITIES: HUMAN CAPITAL MANAGEMENT MARKET, BY REGION, 2024–2029 (USD MILLION)****9.8.1 ENERGY & UTILITIES: APPLICATION AREAS**

- 9.8.1.1 Renewable energy workforce development
- 9.8.1.2 Disaster preparedness training
- 9.8.1.3 FSM
- 9.8.1.4 ETRM training
- 9.8.1.5 Energy conservation programs

9.9 TRANSPORTATION & LOGISTICS**TABLE 73 TRANSPORTATION & LOGISTICS: HUMAN CAPITAL MANAGEMENT MARKET, BY REGION, 2019–2023 (USD MILLION)****TABLE 74 TRANSPORTATION & LOGISTICS: HUMAN CAPITAL MANAGEMENT MARKET, BY REGION, 2024–2029 (USD MILLION)****9.9.1 TRANSPORTATION & LOGISTICS: APPLICATION AREAS**

- 9.9.1.1 Transportation safety training
- 9.9.1.2 Warehouse operations & inventory control training
- 9.9.1.3 Fleet management skills development
- 9.9.1.4 TMS training

9.9.1.5 SCM training

9.10 OTHER VERTICALS

TABLE 75 OTHER VERTICALS: HUMAN CAPITAL MANAGEMENT MARKET, BY REGION, 2019–2023 (USD MILLION)

TABLE 76 OTHER VERTICALS: HUMAN CAPITAL MANAGEMENT MARKET, BY REGION, 2024–2029 (USD MILLION)

10 HUMAN CAPITAL MANAGEMENT MARKET, BY REGION

10.1 INTRODUCTION

FIGURE 39 NORTH AMERICA TO ACCOUNT FOR LARGEST MARKET SHARE DURING FORECAST PERIOD

TABLE 77 HUMAN CAPITAL MANAGEMENT MARKET, BY REGION, 2019–2023 (USD MILLION)

TABLE 78 HUMAN CAPITAL MANAGEMENT MARKET, BY REGION, 2024–2029 (USD MILLION)

10.2 NORTH AMERICA

10.2.1 NORTH AMERICA: HUMAN CAPITAL MANAGEMENT MARKET DRIVERS

10.2.2 NORTH AMERICA: RECESSION IMPACT

FIGURE 40 NORTH AMERICA: MARKET SNAPSHOT

TABLE 79 NORTH AMERICA: HUMAN CAPITAL MANAGEMENT MARKET, BY OFFERING, 2019–2023 (USD MILLION)

TABLE 80 NORTH AMERICA: HUMAN CAPITAL MANAGEMENT MARKET, BY OFFERING, 2024–2029 (USD MILLION)

TABLE 81 NORTH AMERICA: HUMAN CAPITAL MANAGEMENT MARKET, BY SOFTWARE, 2019–2023 (USD MILLION)

TABLE 82 NORTH AMERICA: HUMAN CAPITAL MANAGEMENT MARKET, BY SOFTWARE, 2024–2029 (USD MILLION)

TABLE 83 NORTH AMERICA: HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE, 2019–2023 (USD MILLION)

TABLE 84 NORTH AMERICA: HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE, 2024–2029 (USD MILLION)

TABLE 85 NORTH AMERICA: HUMAN CAPITAL MANAGEMENT MARKET, BY PROFESSIONAL SERVICE, 2019–2023 (USD MILLION)

TABLE 86 NORTH AMERICA: HUMAN CAPITAL MANAGEMENT MARKET, BY PROFESSIONAL SERVICE, 2024–2029 (USD MILLION)

TABLE 87 NORTH AMERICA: HUMAN CAPITAL MANAGEMENT MARKET, BY DEPLOYMENT MODEL, 2019–2023 (USD MILLION)

TABLE 88 NORTH AMERICA: HUMAN CAPITAL MANAGEMENT MARKET, BY

DEPLOYMENT MODEL, 2024–2029 (USD MILLION)

TABLE 89 NORTH AMERICA: HUMAN CAPITAL MANAGEMENT MARKET, BY ORGANIZATION SIZE, 2019–2023 (USD MILLION)

TABLE 90 NORTH AMERICA: HUMAN CAPITAL MANAGEMENT MARKET, BY ORGANIZATION SIZE, 2024–2029 (USD MILLION)

TABLE 91 NORTH AMERICA: HUMAN CAPITAL MANAGEMENT MARKET, BY VERTICAL, 2019–2023 (USD MILLION)

TABLE 92 NORTH AMERICA: HUMAN CAPITAL MANAGEMENT MARKET, BY VERTICAL, 2024–2029 (USD MILLION)

TABLE 93 NORTH AMERICA: HUMAN CAPITAL MANAGEMENT MARKET, BY COUNTRY, 2019–2023 (USD MILLION)

TABLE 94 NORTH AMERICA: HUMAN CAPITAL MANAGEMENT MARKET, BY COUNTRY, 2024–2029 (USD MILLION)

10.2.3 US

10.2.3.1 Expanding IT industry to enhance employee experience and workforce management efficiency

TABLE 95 US: HUMAN CAPITAL MANAGEMENT MARKET, BY OFFERING, 2019–2023 (USD MILLION)

TABLE 96 US: HUMAN CAPITAL MANAGEMENT MARKET, BY OFFERING, 2024–2029 (USD MILLION)

TABLE 97 US: HUMAN CAPITAL MANAGEMENT MARKET, BY SOFTWARE, 2019–2023 (USD MILLION)

TABLE 98 US: HUMAN CAPITAL MANAGEMENT MARKET, BY SOFTWARE, 2024–2029 (USD MILLION)

TABLE 99 US: HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE, 2019–2023 (USD MILLION)

TABLE 100 US: HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE, 2024–2029 (USD MILLION)

TABLE 101 US: HUMAN CAPITAL MANAGEMENT MARKET, BY DEPLOYMENT MODEL, 2019–2023 (USD MILLION)

TABLE 102 US: HUMAN CAPITAL MANAGEMENT MARKET, BY DEPLOYMENT MODEL, 2024–2029 (USD MILLION)

TABLE 103 US: HUMAN CAPITAL MANAGEMENT MARKET, BY ORGANIZATION SIZE, 2019–2023 (USD MILLION)

TABLE 104 US: HUMAN CAPITAL MANAGEMENT MARKET, BY ORGANIZATION SIZE, 2024–2029 (USD MILLION)

10.2.4 CANADA

10.2.4.1 Increasing popularity of cloud services, need for workforce optimization, and focus on talent mobility to propel market

TABLE 105 CANADA: HUMAN CAPITAL MANAGEMENT MARKET, BY OFFERING, 2019–2023 (USD MILLION)

TABLE 106 CANADA: HUMAN CAPITAL MANAGEMENT MARKET, BY OFFERING, 2024–2029 (USD MILLION)

TABLE 107 CANADA: HUMAN CAPITAL MANAGEMENT MARKET, BY SOFTWARE, 2019–2023 (USD MILLION)

TABLE 108 CANADA: HUMAN CAPITAL MANAGEMENT MARKET, BY SOFTWARE, 2024–2029 (USD MILLION)

TABLE 109 CANADA: HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE, 2019–2023 (USD MILLION)

TABLE 110 CANADA: HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE, 2024–2029 (USD MILLION)

TABLE 111 CANADA: HUMAN CAPITAL MANAGEMENT MARKET, BY DEPLOYMENT MODEL, 2019–2023 (USD MILLION)

TABLE 112 CANADA: HUMAN CAPITAL MANAGEMENT MARKET, BY DEPLOYMENT MODEL, 2024–2029 (USD MILLION)

TABLE 113 CANADA: HUMAN CAPITAL MANAGEMENT MARKET, BY ORGANIZATION SIZE, 2019–2023 (USD MILLION)

TABLE 114 CANADA: HUMAN CAPITAL MANAGEMENT MARKET, BY ORGANIZATION SIZE, 2024–2029 (USD MILLION)

10.3 EUROPE

10.3.1 EUROPE: HUMAN CAPITAL MANAGEMENT MARKET DRIVERS

10.3.2 EUROPE: RECESSION IMPACT

TABLE 115 EUROPE: HUMAN CAPITAL MANAGEMENT MARKET, BY OFFERING, 2019–2023 (USD MILLION)

TABLE 116 EUROPE: HUMAN CAPITAL MANAGEMENT MARKET, BY OFFERING, 2024–2029 (USD MILLION)

TABLE 117 EUROPE: HUMAN CAPITAL MANAGEMENT MARKET, BY SOFTWARE, 2019–2023 (USD MILLION)

TABLE 118 EUROPE: HUMAN CAPITAL MANAGEMENT MARKET, BY SOFTWARE, 2024–2029 (USD MILLION)

TABLE 119 EUROPE: HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE, 2019–2023 (USD MILLION)

TABLE 120 EUROPE: HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE, 2024–2029 (USD MILLION)

TABLE 121 EUROPE: HUMAN CAPITAL MANAGEMENT MARKET, BY PROFESSIONAL SERVICE, 2019–2023 (USD MILLION)

TABLE 122 EUROPE: HUMAN CAPITAL MANAGEMENT MARKET, BY PROFESSIONAL SERVICE, 2024–2029 (USD MILLION)

TABLE 123 EUROPE: HUMAN CAPITAL MANAGEMENT MARKET, BY DEPLOYMENT MODEL, 2019–2023 (USD MILLION)

TABLE 124 EUROPE: HUMAN CAPITAL MANAGEMENT MARKET, BY DEPLOYMENT MODEL, 2024–2029 (USD MILLION)

TABLE 125 EUROPE: HUMAN CAPITAL MANAGEMENT MARKET, BY ORGANIZATION SIZE, 2019–2023 (USD MILLION)

TABLE 126 EUROPE: HUMAN CAPITAL MANAGEMENT MARKET, BY ORGANIZATION SIZE, 2024–2029 (USD MILLION)

TABLE 127 EUROPE: HUMAN CAPITAL MANAGEMENT MARKET, BY VERTICAL, 2019–2023 (USD MILLION)

TABLE 128 EUROPE: HUMAN CAPITAL MANAGEMENT MARKET, BY VERTICAL, 2024–2029 (USD MILLION)

TABLE 129 EUROPE: HUMAN CAPITAL MANAGEMENT MARKET, BY COUNTRY, 2019–2023 (USD MILLION)

TABLE 130 EUROPE: HUMAN CAPITAL MANAGEMENT MARKET, BY COUNTRY, 2024–2029 (USD MILLION)

10.3.3 UK

10.3.3.1 Focus on workforce analytics and keen adoption of advanced technology to spur market growth

TABLE 131 UK: HUMAN CAPITAL MANAGEMENT MARKET, BY OFFERING, 2019–2023 (USD MILLION)

TABLE 132 UK: HUMAN CAPITAL MANAGEMENT MARKET, BY OFFERING, 2024–2029 (USD MILLION)

TABLE 133 UK: HUMAN CAPITAL MANAGEMENT MARKET, BY SOFTWARE, 2019–2023 (USD MILLION)

TABLE 134 UK: HUMAN CAPITAL MANAGEMENT MARKET, BY SOFTWARE, 2024–2029 (USD MILLION)

TABLE 135 UK: HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE, 2019–2023 (USD MILLION)

TABLE 136 UK: HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE, 2024–2029 (USD MILLION)

TABLE 137 UK: HUMAN CAPITAL MANAGEMENT MARKET, BY DEPLOYMENT MODEL, 2019–2023 (USD MILLION)

TABLE 138 UK: HUMAN CAPITAL MANAGEMENT MARKET, BY DEPLOYMENT MODEL, 2024–2029 (USD MILLION)

TABLE 139 UK: HUMAN CAPITAL MANAGEMENT MARKET, BY ORGANIZATION SIZE, 2019–2023 (USD MILLION)

TABLE 140 UK: HUMAN CAPITAL MANAGEMENT MARKET, BY ORGANIZATION SIZE, 2024–2029 (USD MILLION)

10.3.4 GERMANY

10.3.4.1 Presence of major HCM software providers and need for data protection and compliance to accelerate market growth

TABLE 141 GERMANY: HUMAN CAPITAL MANAGEMENT MARKET, BY OFFERING, 2019–2023 (USD MILLION)

TABLE 142 GERMANY: HUMAN CAPITAL MANAGEMENT MARKET, BY OFFERING, 2024–2029 (USD MILLION)

TABLE 143 GERMANY: HUMAN CAPITAL MANAGEMENT MARKET, BY SOFTWARE, 2019–2023 (USD MILLION)

TABLE 144 GERMANY: HUMAN CAPITAL MANAGEMENT MARKET, BY SOFTWARE, 2024–2029 (USD MILLION)

TABLE 145 GERMANY: HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE, 2019–2023 (USD MILLION)

TABLE 146 GERMANY: HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE, 2024–2029 (USD MILLION)

TABLE 147 GERMANY: HUMAN CAPITAL MANAGEMENT MARKET, BY DEPLOYMENT MODEL, 2019–2023 (USD MILLION)

TABLE 148 GERMANY: HUMAN CAPITAL MANAGEMENT MARKET, BY DEPLOYMENT MODEL, 2024–2029 (USD MILLION)

TABLE 149 GERMANY: HUMAN CAPITAL MANAGEMENT MARKET, BY ORGANIZATION SIZE, 2019–2023 (USD MILLION)

TABLE 150 GERMANY: HUMAN CAPITAL MANAGEMENT MARKET, BY ORGANIZATION SIZE, 2024–2029 (USD MILLION)

10.3.5 FRANCE

10.3.5.1 Rising adoption of cloud-based HCM solutions and focus on data security and compliance and employee self-service features to boost market growth

TABLE 151 FRANCE: HUMAN CAPITAL MANAGEMENT MARKET, BY OFFERING, 2019–2023 (USD MILLION)

TABLE 152 FRANCE: HUMAN CAPITAL MANAGEMENT MARKET, BY OFFERING, 2024–2029 (USD MILLION)

TABLE 153 FRANCE: HUMAN CAPITAL MANAGEMENT MARKET, BY SOFTWARE, 2019–2023 (USD MILLION)

TABLE 154 FRANCE: HUMAN CAPITAL MANAGEMENT MARKET, BY SOFTWARE, 2024–2029 (USD MILLION)

TABLE 155 FRANCE: HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE, 2019–2023 (USD MILLION)

TABLE 156 FRANCE: HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE, 2024–2029 (USD MILLION)

TABLE 157 FRANCE: HUMAN CAPITAL MANAGEMENT MARKET, BY

DEPLOYMENT MODEL, 2019–2023 (USD MILLION)

TABLE 158 FRANCE: HUMAN CAPITAL MANAGEMENT MARKET, BY
DEPLOYMENT MODEL, 2024–2029 (USD MILLION)

TABLE 159 FRANCE: HUMAN CAPITAL MANAGEMENT MARKET, BY
ORGANIZATION SIZE, 2019–2023 (USD MILLION)

TABLE 160 FRANCE: HUMAN CAPITAL MANAGEMENT MARKET, BY
ORGANIZATION SIZE, 2024–2029 (USD MILLION)

10.3.6 ITALY

10.3.6.1 Concerns about data security and compliance to fuel demand for HCM
solutions

TABLE 161 ITALY: HUMAN CAPITAL MANAGEMENT MARKET, BY OFFERING,
2019–2023 (USD MILLION)

TABLE 162 ITALY: HUMAN CAPITAL MANAGEMENT MARKET, BY OFFERING,
2024–2029 (USD MILLION)

TABLE 163 ITALY: HUMAN CAPITAL MANAGEMENT MARKET, BY SOFTWARE,
2019–2023 (USD MILLION)

TABLE 164 ITALY: HUMAN CAPITAL MANAGEMENT MARKET, BY SOFTWARE,
2024–2029 (USD MILLION)

TABLE 165 ITALY: HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE,
2019–2023 (USD MILLION)

TABLE 166 ITALY: HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE,
2024–2029 (USD MILLION)

TABLE 167 ITALY: HUMAN CAPITAL MANAGEMENT MARKET, BY DEPLOYMENT
MODEL, 2019–2023 (USD MILLION)

TABLE 168 ITALY: HUMAN CAPITAL MANAGEMENT MARKET, BY DEPLOYMENT
MODEL, 2024–2029 (USD MILLION)

TABLE 169 ITALY: HUMAN CAPITAL MANAGEMENT MARKET, BY ORGANIZATION
SIZE, 2019–2023 (USD MILLION)

TABLE 170 ITALY: HUMAN CAPITAL MANAGEMENT MARKET, BY ORGANIZATION
SIZE, 2024–2029 (USD MILLION)

10.3.7 REST OF EUROPE

TABLE 171 REST OF EUROPE: HUMAN CAPITAL MANAGEMENT MARKET, BY
OFFERING, 2019–2023 (USD MILLION)

TABLE 172 REST OF EUROPE: HUMAN CAPITAL MANAGEMENT MARKET, BY
OFFERING, 2024–2029 (USD MILLION)

TABLE 173 REST OF EUROPE: HUMAN CAPITAL MANAGEMENT MARKET, BY
SOFTWARE, 2019–2023 (USD MILLION)

TABLE 174 REST OF EUROPE: HUMAN CAPITAL MANAGEMENT MARKET, BY
SOFTWARE, 2024–2029 (USD MILLION)

TABLE 175 REST OF EUROPE: HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE, 2019–2023 (USD MILLION)

TABLE 176 REST OF EUROPE: HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE, 2024–2029 (USD MILLION)

TABLE 177 REST OF EUROPE: HUMAN CAPITAL MANAGEMENT MARKET, BY DEPLOYMENT MODEL, 2019–2023 (USD MILLION)

TABLE 178 REST OF EUROPE: HUMAN CAPITAL MANAGEMENT MARKET, BY DEPLOYMENT MODEL, 2024–2029 (USD MILLION)

TABLE 179 REST OF EUROPE: HUMAN CAPITAL MANAGEMENT MARKET, BY ORGANIZATION SIZE, 2019–2023 (USD MILLION)

TABLE 180 REST OF EUROPE: HUMAN CAPITAL MANAGEMENT MARKET, BY ORGANIZATION SIZE, 2024–2029 (USD MILLION)

10.4 ASIA PACIFIC

10.4.1 ASIA PACIFIC: HUMAN CAPITAL MANAGEMENT MARKET DRIVERS

10.4.2 ASIA PACIFIC: RECESSION IMPACT

FIGURE 41 ASIA PACIFIC: MARKET SNAPSHOT

TABLE 181 ASIA PACIFIC: HUMAN CAPITAL MANAGEMENT MARKET, BY OFFERING, 2019–2023 (USD MILLION)

TABLE 182 ASIA PACIFIC: HUMAN CAPITAL MANAGEMENT MARKET, BY OFFERING, 2024–2029 (USD MILLION)

TABLE 183 ASIA PACIFIC: HUMAN CAPITAL MANAGEMENT MARKET, BY SOFTWARE, 2019–2023 (USD MILLION)

TABLE 184 ASIA PACIFIC: HUMAN CAPITAL MANAGEMENT MARKET, BY SOFTWARE, 2024–2029 (USD MILLION)

TABLE 185 ASIA PACIFIC: HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE, 2019–2023 (USD MILLION)

TABLE 186 ASIA PACIFIC: HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE, 2024–2029 (USD MILLION)

TABLE 187 ASIA PACIFIC: HUMAN CAPITAL MANAGEMENT MARKET, BY PROFESSIONAL SERVICE, 2019–2023 (USD MILLION)

TABLE 188 ASIA PACIFIC: HUMAN CAPITAL MANAGEMENT MARKET, BY PROFESSIONAL SERVICE, 2024–2029 (USD MILLION)

TABLE 189 ASIA PACIFIC: HUMAN CAPITAL MANAGEMENT MARKET, BY DEPLOYMENT MODEL, 2019–2023 (USD MILLION)

TABLE 190 ASIA PACIFIC: HUMAN CAPITAL MANAGEMENT MARKET, BY DEPLOYMENT MODEL, 2024–2029 (USD MILLION)

TABLE 191 ASIA PACIFIC: HUMAN CAPITAL MANAGEMENT MARKET, BY ORGANIZATION SIZE, 2019–2023 (USD MILLION)

TABLE 192 ASIA PACIFIC: HUMAN CAPITAL MANAGEMENT MARKET, BY

ORGANIZATION SIZE, 2024–2029 (USD MILLION)**TABLE 193 ASIA PACIFIC: HUMAN CAPITAL MANAGEMENT MARKET, BY VERTICAL, 2019–2023 (USD MILLION)****TABLE 194 ASIA PACIFIC: HUMAN CAPITAL MANAGEMENT MARKET, BY VERTICAL, 2024–2029 (USD MILLION)****TABLE 195 ASIA PACIFIC: HUMAN CAPITAL MANAGEMENT MARKET, BY COUNTRY, 2019–2023 (USD MILLION)****TABLE 196 ASIA PACIFIC: HUMAN CAPITAL MANAGEMENT MARKET, BY COUNTRY, 2024–2029 (USD MILLION)****10.4.3 CHINA****10.4.3.1 Need to maintain competitive market position, stable economy, and availability of skilled labor to drive market****TABLE 197 CHINA: HUMAN CAPITAL MANAGEMENT MARKET, BY OFFERING, 2019–2023 (USD MILLION)****TABLE 198 CHINA: HUMAN CAPITAL MANAGEMENT MARKET, BY OFFERING, 2024–2029 (USD MILLION)****TABLE 199 CHINA: HUMAN CAPITAL MANAGEMENT MARKET, BY SOFTWARE, 2019–2023 (USD MILLION)****TABLE 200 CHINA: HUMAN CAPITAL MANAGEMENT MARKET, BY SOFTWARE, 2024–2029 (USD MILLION)****TABLE 201 CHINA: HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE, 2019–2023 (USD MILLION)****TABLE 202 CHINA: HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE, 2024–2029 (USD MILLION)****TABLE 203 CHINA: HUMAN CAPITAL MANAGEMENT MARKET, BY DEPLOYMENT MODEL, 2019–2023 (USD MILLION)****TABLE 204 CHINA: HUMAN CAPITAL MANAGEMENT MARKET, BY DEPLOYMENT MODEL, 2024–2029 (USD MILLION)****TABLE 205 CHINA: HUMAN CAPITAL MANAGEMENT MARKET, BY ORGANIZATION SIZE, 2019–2023 (USD MILLION)****TABLE 206 CHINA: HUMAN CAPITAL MANAGEMENT MARKET, BY ORGANIZATION SIZE, 2024–2029 (USD MILLION)****10.4.4 JAPAN****10.4.4.1 Need to review employee performance, streamline employee onboarding, and improve employee experience to propel market****TABLE 207 JAPAN: HUMAN CAPITAL MANAGEMENT MARKET, BY OFFERING, 2019–2023 (USD MILLION)****TABLE 208 JAPAN: HUMAN CAPITAL MANAGEMENT MARKET, BY OFFERING, 2024–2029 (USD MILLION)**

TABLE 209 JAPAN: HUMAN CAPITAL MANAGEMENT MARKET, BY SOFTWARE, 2019–2023 (USD MILLION)

TABLE 210 JAPAN: HUMAN CAPITAL MANAGEMENT MARKET, BY SOFTWARE, 2024–2029 (USD MILLION)

TABLE 211 JAPAN: HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE, 2019–2023 (USD MILLION)

TABLE 212 JAPAN: HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE, 2024–2029 (USD MILLION)

TABLE 213 JAPAN: HUMAN CAPITAL MANAGEMENT MARKET, BY DEPLOYMENT MODEL, 2019–2023 (USD MILLION)

TABLE 214 JAPAN: HUMAN CAPITAL MANAGEMENT MARKET, BY DEPLOYMENT MODEL, 2024–2029 (USD MILLION)

TABLE 215 JAPAN: HUMAN CAPITAL MANAGEMENT MARKET, BY ORGANIZATION SIZE, 2019–2023 (USD MILLION)

TABLE 216 JAPAN: HUMAN CAPITAL MANAGEMENT MARKET, BY ORGANIZATION SIZE, 2024–2029 (USD MILLION)

10.4.5 AUSTRALIA & NEW ZEALAND

10.4.5.1 Adoption of cloud-based HR management software, substantial growth in eCommerce sector, and rapid globalization to drive market

TABLE 217 AUSTRALIA & NEW ZEALAND: HUMAN CAPITAL MANAGEMENT MARKET, BY OFFERING, 2019–2023 (USD MILLION)

TABLE 218 AUSTRALIA & NEW ZEALAND: HUMAN CAPITAL MANAGEMENT MARKET, BY OFFERING, 2024–2029 (USD MILLION)

TABLE 219 AUSTRALIA & NEW ZEALAND: HUMAN CAPITAL MANAGEMENT MARKET, BY SOFTWARE, 2019–2023 (USD MILLION)

TABLE 220 AUSTRALIA & NEW ZEALAND: HUMAN CAPITAL MANAGEMENT MARKET, BY SOFTWARE, 2024–2029 (USD MILLION)

TABLE 221 AUSTRALIA & NEW ZEALAND: HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE, 2019–2023 (USD MILLION)

TABLE 222 AUSTRALIA & NEW ZEALAND: HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE, 2024–2029 (USD MILLION)

TABLE 223 AUSTRALIA & NEW ZEALAND: HUMAN CAPITAL MANAGEMENT MARKET, BY DEPLOYMENT MODEL, 2019–2023 (USD MILLION)

TABLE 224 AUSTRALIA & NEW ZEALAND: HUMAN CAPITAL MANAGEMENT MARKET, BY DEPLOYMENT MODEL, 2024–2029 (USD MILLION)

TABLE 225 AUSTRALIA & NEW ZEALAND: HUMAN CAPITAL MANAGEMENT MARKET, BY ORGANIZATION SIZE, 2019–2023 (USD MILLION)

TABLE 226 AUSTRALIA & NEW ZEALAND: HUMAN CAPITAL MANAGEMENT MARKET, BY ORGANIZATION SIZE, 2024–2029 (USD MILLION)

10.4.6 INDIA

10.4.6.1 Drivers

10.4.6.1.1 Increasing globalization of businesses necessitates efficient HCM strategies to adapt to diverse workforce dynamics

10.4.6.1.2 Younger workforce reshaping expectations of workplace culture

10.4.6.1.3 Growing focus on employee well-being programs for improving work-life balance

10.4.6.2 Restraints

10.4.6.2.1 Rapid job switching among employees

10.4.6.3 Opportunities

10.4.6.3.1 Increasing adoption of advanced technologies enabling informed decision-making

10.4.6.3.2 Mobile-responsive HCM software improving productivity

10.4.6.4 Challenges

10.4.6.4.1 Complex labor laws and regulation poses challenges for compliance

TABLE 227 INDIA: HUMAN CAPITAL MANAGEMENT MARKET, BY OFFERING, 2019–2023 (USD MILLION)

TABLE 228 INDIA: HUMAN CAPITAL MANAGEMENT MARKET, BY OFFERING, 2024–2029 (USD MILLION)

TABLE 229 INDIA: HUMAN CAPITAL MANAGEMENT MARKET, BY SOFTWARE, 2019–2023 (USD MILLION)

TABLE 230 INDIA: HUMAN CAPITAL MANAGEMENT MARKET, BY SOFTWARE, 2024–2029 (USD MILLION)

TABLE 231 INDIA: HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE, 2019–2023 (USD MILLION)

TABLE 232 INDIA: HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE, 2024–2029 (USD MILLION)

TABLE 233 INDIA: HUMAN CAPITAL MANAGEMENT MARKET, BY DEPLOYMENT MODEL, 2019–2023 (USD MILLION)

TABLE 234 INDIA: HUMAN CAPITAL MANAGEMENT MARKET, BY DEPLOYMENT MODEL, 2024–2029 (USD MILLION)

TABLE 235 INDIA: HUMAN CAPITAL MANAGEMENT MARKET, BY ORGANIZATION SIZE, 2019–2023 (USD MILLION)

TABLE 236 INDIA: HUMAN CAPITAL MANAGEMENT MARKET, BY ORGANIZATION SIZE, 2024–2029 (USD MILLION)

10.4.7 REST OF ASIA PACIFIC

TABLE 237 REST OF ASIA PACIFIC: HUMAN CAPITAL MANAGEMENT MARKET, BY OFFERING, 2019–2023 (USD MILLION)

TABLE 238 REST OF ASIA PACIFIC: HUMAN CAPITAL MANAGEMENT MARKET, BY

OFFERING, 2024–2029 (USD MILLION)

TABLE 239 REST OF ASIA PACIFIC: HUMAN CAPITAL MANAGEMENT MARKET, BY SOFTWARE, 2019–2023 (USD MILLION)

TABLE 240 REST OF ASIA PACIFIC: HUMAN CAPITAL MANAGEMENT MARKET, BY SOFTWARE, 2024–2029 (USD MILLION)

TABLE 241 REST OF ASIA PACIFIC: HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE, 2019–2023 (USD MILLION)

TABLE 242 REST OF ASIA PACIFIC: HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE, 2024–2029 (USD MILLION)

TABLE 243 REST OF ASIA PACIFIC: HUMAN CAPITAL MANAGEMENT MARKET, BY DEPLOYMENT MODEL, 2019–2023 (USD MILLION)

TABLE 244 REST OF ASIA PACIFIC: HUMAN CAPITAL MANAGEMENT MARKET, BY DEPLOYMENT MODEL, 2024–2029 (USD MILLION)

TABLE 245 REST OF ASIA PACIFIC: HUMAN CAPITAL MANAGEMENT MARKET, BY ORGANIZATION SIZE, 2019–2023 (USD MILLION)

TABLE 246 REST OF ASIA PACIFIC: HUMAN CAPITAL MANAGEMENT MARKET, BY ORGANIZATION SIZE, 2024–2029 (USD MILLION)

10.5 MIDDLE EAST & AFRICA

10.5.1 MIDDLE EAST & AFRICA: HUMAN CAPITAL MANAGEMENT MARKET DRIVERS

10.5.2 MIDDLE EAST & AFRICA: RECESSION IMPACT

TABLE 247 MIDDLE EAST & AFRICA: HUMAN CAPITAL MANAGEMENT MARKET, BY OFFERING, 2019–2023 (USD MILLION)

TABLE 248 MIDDLE EAST & AFRICA: HUMAN CAPITAL MANAGEMENT MARKET, BY OFFERING, 2024–2029 (USD MILLION)

TABLE 249 MIDDLE EAST & AFRICA: HUMAN CAPITAL MANAGEMENT MARKET, BY SOFTWARE, 2019–2023 (USD MILLION)

TABLE 250 MIDDLE EAST & AFRICA: HUMAN CAPITAL MANAGEMENT MARKET, BY SOFTWARE, 2024–2029 (USD MILLION)

TABLE 251 MIDDLE EAST & AFRICA: HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE, 2019–2023 (USD MILLION)

TABLE 252 MIDDLE EAST & AFRICA: HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE, 2024–2029 (USD MILLION)

TABLE 253 MIDDLE EAST & AFRICA: HUMAN CAPITAL MANAGEMENT MARKET, BY PROFESSIONAL SERVICE, 2019–2023 (USD MILLION)

TABLE 254 MIDDLE EAST & AFRICA: HUMAN CAPITAL MANAGEMENT MARKET, BY PROFESSIONAL SERVICE, 2024–2029 (USD MILLION)

TABLE 255 MIDDLE EAST & AFRICA: HUMAN CAPITAL MANAGEMENT MARKET, BY DEPLOYMENT MODEL, 2019–2023 (USD MILLION)

TABLE 256 MIDDLE EAST & AFRICA: HUMAN CAPITAL MANAGEMENT MARKET, BY DEPLOYMENT MODEL, 2024–2029 (USD MILLION)

TABLE 257 MIDDLE EAST & AFRICA: HUMAN CAPITAL MANAGEMENT MARKET, BY ORGANIZATION SIZE, 2019–2023 (USD MILLION)

TABLE 258 MIDDLE EAST & AFRICA: HUMAN CAPITAL MANAGEMENT MARKET, BY ORGANIZATION SIZE, 2024–2029 (USD MILLION)

TABLE 259 MIDDLE EAST & AFRICA: HUMAN CAPITAL MANAGEMENT MARKET, BY VERTICAL, 2019–2023 (USD MILLION)

TABLE 260 MIDDLE EAST & AFRICA: HUMAN CAPITAL MANAGEMENT MARKET, BY VERTICAL, 2024–2029 (USD MILLION)

TABLE 261 MIDDLE EAST & AFRICA: HUMAN CAPITAL MANAGEMENT MARKET, BY COUNTRY/REGION, 2019–2023 (USD MILLION)

TABLE 262 MIDDLE EAST & AFRICA: HUMAN CAPITAL MANAGEMENT MARKET, BY COUNTRY/REGION, 2024–2029 (USD MILLION)

10.5.3 GCC COUNTRIES

10.5.3.1 Huge demand for outsourcing to foster market growth

TABLE 263 GCC COUNTRIES: HUMAN CAPITAL MANAGEMENT MARKET, BY OFFERING, 2019–2023 (USD MILLION)

TABLE 264 GCC COUNTRIES: HUMAN CAPITAL MANAGEMENT MARKET, BY OFFERING, 2024–2029 (USD MILLION)

TABLE 265 GCC COUNTRIES: HUMAN CAPITAL MANAGEMENT MARKET, BY SOFTWARE, 2019–2023 (USD MILLION)

TABLE 266 GCC COUNTRIES: HUMAN CAPITAL MANAGEMENT MARKET, BY SOFTWARE, 2024–2029 (USD MILLION)

TABLE 267 GCC COUNTRIES: HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE, 2019–2023 (USD MILLION)

TABLE 268 GCC COUNTRIES: HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE, 2024–2029 (USD MILLION)

TABLE 269 GCC COUNTRIES: HUMAN CAPITAL MANAGEMENT MARKET, BY DEPLOYMENT MODEL, 2019–2023 (USD MILLION)

TABLE 270 GCC COUNTRIES: HUMAN CAPITAL MANAGEMENT MARKET, BY DEPLOYMENT MODEL, 2024–2029 (USD MILLION)

TABLE 271 GCC COUNTRIES: HUMAN CAPITAL MANAGEMENT MARKET, BY ORGANIZATION SIZE, 2019–2023 (USD MILLION)

TABLE 272 GCC COUNTRIES: HUMAN CAPITAL MANAGEMENT MARKET, BY ORGANIZATION SIZE, 2024–2029 (USD MILLION)

TABLE 273 GCC COUNTRIES: HUMAN CAPITAL MANAGEMENT MARKET, BY COUNTRY, 2019–2023 (USD MILLION)

TABLE 274 GCC COUNTRIES: HUMAN CAPITAL MANAGEMENT MARKET, BY

COUNTRY, 2024–2029 (USD MILLION)

10.5.3.2 Saudi Arabia

10.5.3.3 UAE

10.5.3.4 Rest of GCC countries

10.5.4 SOUTH AFRICA

10.5.4.1 Growing use of cloud services to boost adoption of HCM

TABLE 275 SOUTH AFRICA: HUMAN CAPITAL MANAGEMENT MARKET, BY OFFERING, 2019–2023 (USD MILLION)**TABLE 276 SOUTH AFRICA: HUMAN CAPITAL MANAGEMENT MARKET, BY OFFERING, 2024–2029 (USD MILLION)****TABLE 277 SOUTH AFRICA: HUMAN CAPITAL MANAGEMENT MARKET, BY SOFTWARE, 2019–2023 (USD MILLION)****TABLE 278 SOUTH AFRICA: HUMAN CAPITAL MANAGEMENT MARKET, BY SOFTWARE, 2024–2029 (USD MILLION)****TABLE 279 SOUTH AFRICA: HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE, 2019–2023 (USD MILLION)****TABLE 280 SOUTH AFRICA: HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE, 2024–2029 (USD MILLION)****TABLE 281 SOUTH AFRICA: HUMAN CAPITAL MANAGEMENT MARKET, BY DEPLOYMENT MODEL, 2019–2023 (USD MILLION)****TABLE 282 SOUTH AFRICA: HUMAN CAPITAL MANAGEMENT MARKET, BY DEPLOYMENT MODEL, 2024–2029 (USD MILLION)****TABLE 283 SOUTH AFRICA: HUMAN CAPITAL MANAGEMENT MARKET, BY ORGANIZATION SIZE, 2019–2023 (USD MILLION)****TABLE 284 SOUTH AFRICA: HUMAN CAPITAL MANAGEMENT MARKET, BY ORGANIZATION SIZE, 2024–2029 (USD MILLION)****10.5.5 REST OF MIDDLE EAST & AFRICA****TABLE 285 REST OF MIDDLE EAST & AFRICA: HUMAN CAPITAL MANAGEMENT MARKET, BY OFFERING, 2019–2023 (USD MILLION)****TABLE 286 REST OF MIDDLE EAST & AFRICA: HUMAN CAPITAL MANAGEMENT MARKET, BY OFFERING, 2024–2029 (USD MILLION)****TABLE 287 REST OF MIDDLE EAST & AFRICA: HUMAN CAPITAL MANAGEMENT MARKET, BY SOFTWARE, 2019–2023 (USD MILLION)****TABLE 288 REST OF MIDDLE EAST & AFRICA: HUMAN CAPITAL MANAGEMENT MARKET, BY SOFTWARE, 2024–2029 (USD MILLION)****TABLE 289 REST OF MIDDLE EAST & AFRICA: HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE, 2019–2023 (USD MILLION)****TABLE 290 REST OF MIDDLE EAST & AFRICA: HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE, 2024–2029 (USD MILLION)**

TABLE 291 REST OF MIDDLE EAST & AFRICA: HUMAN CAPITAL MANAGEMENT MARKET, BY DEPLOYMENT MODEL, 2019–2023 (USD MILLION)

TABLE 292 REST OF MIDDLE EAST & AFRICA: HUMAN CAPITAL MANAGEMENT MARKET, BY DEPLOYMENT MODEL, 2024–2029 (USD MILLION)

TABLE 293 REST OF MIDDLE EAST & AFRICA: HUMAN CAPITAL MANAGEMENT MARKET, BY ORGANIZATION SIZE, 2019–2023 (USD MILLION)

TABLE 294 REST OF MIDDLE EAST & AFRICA: HUMAN CAPITAL MANAGEMENT MARKET, BY ORGANIZATION SIZE, 2024–2029 (USD MILLION)

10.6 LATIN AMERICA

10.6.1 LATIN AMERICA: HUMAN CAPITAL MANAGEMENT MARKET DRIVERS

10.6.2 LATIN AMERICA: RECESSION IMPACT

TABLE 295 LATIN AMERICA: HUMAN CAPITAL MANAGEMENT MARKET, BY OFFERING, 2019–2023 (USD MILLION)

TABLE 296 LATIN AMERICA: HUMAN CAPITAL MANAGEMENT MARKET, BY OFFERING, 2024–2029 (USD MILLION)

TABLE 297 LATIN AMERICA: HUMAN CAPITAL MANAGEMENT MARKET, BY SOFTWARE, 2019–2023 (USD MILLION)

TABLE 298 LATIN AMERICA: HUMAN CAPITAL MANAGEMENT MARKET, BY SOFTWARE, 2024–2029 (USD MILLION)

TABLE 299 LATIN AMERICA: HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE, 2019–2023 (USD MILLION)

TABLE 300 LATIN AMERICA: HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE, 2024–2029 (USD MILLION)

TABLE 301 LATIN AMERICA: HUMAN CAPITAL MANAGEMENT MARKET, BY PROFESSIONAL SERVICE, 2019–2023 (USD MILLION)

TABLE 302 LATIN AMERICA: HUMAN CAPITAL MANAGEMENT MARKET, BY PROFESSIONAL SERVICE, 2024–2029 (USD MILLION)

TABLE 303 LATIN AMERICA: HUMAN CAPITAL MANAGEMENT MARKET, BY DEPLOYMENT MODEL, 2019–2023 (USD MILLION)

TABLE 304 LATIN AMERICA: HUMAN CAPITAL MANAGEMENT MARKET, BY DEPLOYMENT MODEL, 2024–2029 (USD MILLION)

TABLE 305 LATIN AMERICA: HUMAN CAPITAL MANAGEMENT MARKET, BY ORGANIZATION SIZE, 2019–2023 (USD MILLION)

TABLE 306 LATIN AMERICA: HUMAN CAPITAL MANAGEMENT MARKET, BY ORGANIZATION SIZE, 2024–2029 (USD MILLION)

TABLE 307 LATIN AMERICA: HUMAN CAPITAL MANAGEMENT MARKET, BY VERTICAL, 2019–2023 (USD MILLION)

TABLE 308 LATIN AMERICA: HUMAN CAPITAL MANAGEMENT MARKET, BY VERTICAL, 2024–2029 (USD MILLION)

TABLE 309 LATIN AMERICA: HUMAN CAPITAL MANAGEMENT MARKET, BY COUNTRY, 2019–2023 (USD MILLION)

TABLE 310 LATIN AMERICA: HUMAN CAPITAL MANAGEMENT MARKET, BY COUNTRY, 2024–2029 (USD MILLION)

10.6.3 BRAZIL

10.6.3.1 Need for centralized platform to automate and streamline HR processes to boost demand for HCM solutions

TABLE 311 BRAZIL: HUMAN CAPITAL MANAGEMENT MARKET, BY OFFERING, 2019–2023 (USD MILLION)

TABLE 312 BRAZIL: HUMAN CAPITAL MANAGEMENT MARKET, BY OFFERING, 2024–2029 (USD MILLION)

TABLE 313 BRAZIL: HUMAN CAPITAL MANAGEMENT MARKET, BY SOFTWARE, 2019–2023 (USD MILLION)

TABLE 314 BRAZIL: HUMAN CAPITAL MANAGEMENT MARKET, BY SOFTWARE, 2024–2029 (USD MILLION)

TABLE 315 BRAZIL: HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE, 2019–2023 (USD MILLION)

TABLE 316 BRAZIL: HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE, 2024–2029 (USD MILLION)

TABLE 317 BRAZIL: HUMAN CAPITAL MANAGEMENT MARKET, BY DEPLOYMENT MODEL, 2019–2023 (USD MILLION)

TABLE 318 BRAZIL: HUMAN CAPITAL MANAGEMENT MARKET, BY DEPLOYMENT MODEL, 2024–2029 (USD MILLION)

TABLE 319 BRAZIL: HUMAN CAPITAL MANAGEMENT MARKET, BY ORGANIZATION SIZE, 2019–2023 (USD MILLION)

TABLE 320 BRAZIL: HUMAN CAPITAL MANAGEMENT MARKET, BY ORGANIZATION SIZE, 2024–2029 (USD MILLION)

10.6.4 MEXICO

10.6.4.1 Growing focus on improving business operations to drive market

TABLE 321 MEXICO: HUMAN CAPITAL MANAGEMENT MARKET, BY OFFERING, 2019–2023 (USD MILLION)

TABLE 322 MEXICO: HUMAN CAPITAL MANAGEMENT MARKET, BY OFFERING, 2024–2029 (USD MILLION)

TABLE 323 MEXICO: HUMAN CAPITAL MANAGEMENT MARKET, BY SOFTWARE, 2019–2023 (USD MILLION)

TABLE 324 MEXICO: HUMAN CAPITAL MANAGEMENT MARKET, BY SOFTWARE, 2024–2029 (USD MILLION)

TABLE 325 MEXICO: HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE, 2019–2023 (USD MILLION)

TABLE 326 MEXICO: HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE, 2024–2029 (USD MILLION)

TABLE 327 MEXICO: HUMAN CAPITAL MANAGEMENT MARKET, BY DEPLOYMENT MODEL, 2019–2023 (USD MILLION)

TABLE 328 MEXICO: HUMAN CAPITAL MANAGEMENT MARKET, BY DEPLOYMENT MODEL, 2024–2029 (USD MILLION)

TABLE 329 MEXICO: HUMAN CAPITAL MANAGEMENT MARKET, BY ORGANIZATION SIZE, 2019–2023 (USD MILLION)

TABLE 330 MEXICO: HUMAN CAPITAL MANAGEMENT MARKET, BY ORGANIZATION SIZE, 2024–2029 (USD MILLION)

10.6.5 REST OF LATIN AMERICA

TABLE 331 REST OF LATIN AMERICA: HUMAN CAPITAL MANAGEMENT MARKET, BY OFFERING, 2019–2023 (USD MILLION)

TABLE 332 REST OF LATIN AMERICA: HUMAN CAPITAL MANAGEMENT MARKET, BY OFFERING, 2024–2029 (USD MILLION)

TABLE 333 REST OF LATIN AMERICA: HUMAN CAPITAL MANAGEMENT MARKET, BY SOFTWARE, 2019–2023 (USD MILLION)

TABLE 334 REST OF LATIN AMERICA: HUMAN CAPITAL MANAGEMENT MARKET, BY SOFTWARE, 2024–2029 (USD MILLION)

TABLE 335 REST OF LATIN AMERICA: HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE, 2019–2023 (USD MILLION)

TABLE 336 REST OF LATIN AMERICA: HUMAN CAPITAL MANAGEMENT MARKET, BY SERVICE, 2024–2029 (USD MILLION)

TABLE 337 REST OF LATIN AMERICA: HUMAN CAPITAL MANAGEMENT MARKET, BY DEPLOYMENT MODEL, 2019–2023 (USD MILLION)

TABLE 338 REST OF LATIN AMERICA: HUMAN CAPITAL MANAGEMENT MARKET, BY DEPLOYMENT MODEL, 2024–2029 (USD MILLION)

TABLE 339 REST OF LATIN AMERICA: HUMAN CAPITAL MANAGEMENT MARKET, BY ORGANIZATION SIZE, 2019–2023 (USD MILLION)

TABLE 340 REST OF LATIN AMERICA: HUMAN CAPITAL MANAGEMENT MARKET, BY ORGANIZATION SIZE, 2024–2029 (USD MILLION)

11 COMPETITIVE LANDSCAPE

11.1 OVERVIEW

11.2 KEY PLAYER STRATEGIES/RIGHT TO WIN

TABLE 341 OVERVIEW OF STRATEGIES ADOPTED BY HUMAN CAPITAL MANAGEMENT VENDORS

11.3 REVENUE ANALYSIS

FIGURE 42 TOP 5 PLAYERS DOMINATING MARKET IN LAST 5 YEARS

11.4 MARKET SHARE ANALYSIS

FIGURE 43 SHARE OF LEADING COMPANIES IN HUMAN CAPITAL MANAGEMENT MARKET IN 2023

TABLE 342 HUMAN CAPITAL MANAGEMENT MARKET: DEGREE OF COMPETITION

11.5 PRODUCT/BRAND COMPARISON

FIGURE 44 VENDOR PRODUCTS/BRANDS COMPARISON

11.6 COMPANY EVALUATION MATRIX: KEY PLAYERS, 2023

FIGURE 45 COMPANY EVALUATION MATRIX FOR KEY PLAYERS: CRITERIA WEIGHTAGE

11.6.1 STARS

11.6.2 EMERGING LEADERS

11.6.3 PERVASIVE PLAYERS

11.6.4 PARTICIPANTS

FIGURE 46 HUMAN CAPITAL MANAGEMENT MARKET: COMPANY EVALUATION MATRIX (KEY PLAYERS), 2023

11.6.5 COMPANY FOOTPRINT: KEY PLAYERS, 2023

FIGURE 47 HUMAN CAPITAL MANAGEMENT MARKET: OVERALL COMPANY FOOTPRINT

TABLE 343 HUMAN CAPITAL MANAGEMENT MARKET: REGIONAL FOOTPRINT

TABLE 344 HUMAN CAPITAL MANAGEMENT MARKET: OFFERING FOOTPRINT

TABLE 345 HUMAN CAPITAL MANAGEMENT MARKET: DEPLOYMENT MODEL FOOTPRINT

TABLE 346 HUMAN CAPITAL MANAGEMENT MARKET: VERTICAL FOOTPRINT

11.7 COMPANY EVALUATION MATRIX: START-UPS/SMES, 2023

FIGURE 48 COMPANY EVALUATION MATRIX FOR START-UPS/SMES: CRITERIA WEIGHTAGE

FIGURE 49 HUMAN CAPITAL MANAGEMENT MARKET: COMPANY EVALUATION MATRIX (START-UPS/SMES), 2023

11.7.1 PROGRESSIVE COMPANIES

11.7.2 RESPONSIVE COMPANIES

11.7.3 DYNAMIC COMPANIES

11.7.4 STARTING BLOCKS

11.7.5 COMPETITIVE BENCHMARKING: START-UPS/SMES, 2023

TABLE 347 HUMAN CAPITAL MANAGEMENT MARKET: KEY START-UPS/SMES

TABLE 348 HUMAN CAPITAL MANAGEMENT MARKET: COMPETITIVE BENCHMARKING OF KEY START-UPS/SMES

11.8 COMPANY VALUATION AND FINANCIAL METRICS OF KEY VENDORS

FIGURE 50 COMPANY VALUATION AND FINANCIAL METRICS OF KEY VENDORS**11.9 COMPETITIVE SCENARIO & TRENDS****11.9.1 PRODUCT LAUNCHES AND ENHANCEMENTS**

TABLE 349 HUMAN CAPITAL MANAGEMENT MARKET: PRODUCT LAUNCHES AND ENHANCEMENTS, OCTOBER 2020–DECEMBER 2023

11.9.2 DEALS

TABLE 350 HUMAN CAPITAL MANAGEMENT MARKET: DEALS, SEPTEMBER 2022–JANUARY 2024

12 COMPANY PROFILES**12.1 KEY PLAYERS**

(Business overview, Products/Solutions/Services offered, Recent developments, MnM view, Right to win, Strategic choices made, and Weaknesses and Competitive threats)*

12.1.1 WORKDAY

TABLE 351 WORKDAY: COMPANY OVERVIEW

FIGURE 51 WORKDAY: COMPANY SNAPSHOT

TABLE 352 WORKDAY: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 353 WORKDAY: PRODUCT LAUNCHES AND ENHANCEMENTS

TABLE 354 WORKDAY: DEALS

12.1.2 UKG

TABLE 355 UKG: COMPANY OVERVIEW

TABLE 356 UKG: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 357 UKG: PRODUCT LAUNCHES AND ENHANCEMENTS

TABLE 358 UKG: DEALS

12.1.3 ORACLE

TABLE 359 ORACLE: COMPANY OVERVIEW

FIGURE 52 ORACLE: COMPANY SNAPSHOT

TABLE 360 ORACLE: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 361 ORACLE: PRODUCT LAUNCHES AND ENHANCEMENTS

TABLE 362 ORACLE: DEALS

12.1.4 SAP

TABLE 363 SAP: COMPANY OVERVIEW

FIGURE 53 SAP: COMPANY SNAPSHOT

TABLE 364 SAP: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 365 SAP: PRODUCT LAUNCHES AND ENHANCEMENTS

TABLE 366 SAP: DEALS

12.1.5 DAYFORCE

TABLE 367 DAYFORCE: COMPANY OVERVIEW

FIGURE 54 DAYFORCE: COMPANY SNAPSHOT**TABLE 368 DAYFORCE: PRODUCTS/SOLUTIONS/SERVICES OFFERED****TABLE 369 DAYFORCE: PRODUCT LAUNCHES AND ENHANCEMENTS****TABLE 370 DAYFORCE: DEALS****12.1.6 ADP****TABLE 371 ADP: COMPANY OVERVIEW****FIGURE 55 ADP: COMPANY SNAPSHOT****TABLE 372 ADP: PRODUCTS/SOLUTIONS/SERVICES OFFERED****TABLE 373 ADP: PRODUCT LAUNCHES AND ENHANCEMENTS****TABLE 374 ADP: DEALS****12.1.7 PAYLOCITY****TABLE 375 PAYLOCITY: COMPANY OVERVIEW****FIGURE 56 PAYLOCITY: COMPANY SNAPSHOT****TABLE 376 PAYLOCITY: PRODUCTS/SOLUTIONS/SERVICES OFFERED****TABLE 377 PAYLOCITY: PRODUCT LAUNCHES AND ENHANCEMENTS****TABLE 378 PAYLOCITY: DEALS****12.1.8 PAYCOM****TABLE 379 PAYCOM: COMPANY OVERVIEW****FIGURE 57 PAYCOM: COMPANY SNAPSHOT****TABLE 380 PAYCOM: PRODUCTS/SOLUTIONS/SERVICES OFFERED****TABLE 381 PAYCOM: PRODUCT LAUNCHES AND ENHANCEMENTS****12.1.9 CORNERSTONE****TABLE 382 CORNERSTONE: COMPANY OVERVIEW****TABLE 383 CORNERSTONE: PRODUCTS/SOLUTIONS/SERVICES OFFERED****TABLE 384 CORNERSTONE: PRODUCT LAUNCHES AND ENHANCEMENTS****TABLE 385 CORNERSTONE: DEALS****12.1.10 MICROSOFT****TABLE 386 MICROSOFT: COMPANY OVERVIEW****FIGURE 58 MICROSOFT: COMPANY SNAPSHOT****TABLE 387 MICROSOFT: PRODUCTS/SOLUTIONS/SERVICES OFFERED****TABLE 388 MICROSOFT: PRODUCT LAUNCHES AND ENHANCEMENTS****TABLE 389 MICROSOFT: DEALS****12.2 OTHER KEY PLAYERS****12.2.1 IBM****12.2.2 CEGID****12.2.3 PEOPLESTRATEGY****12.2.4 INFOR****12.2.5 RAMCO SYSTEM****12.2.6 BAMBOOHR**

- 12.2.7 NAMELY
- 12.2.8 WORKFORCE SOFTWARE
- 12.2.9 ZOHO PEOPLE
- 12.2.10 SAGE GROUP
- 12.2.11 EPICOR SOFTWARE
- 12.2.12 BITRIX24
- 12.2.13 GUSTO
- 12.2.14 BENEFITFOCUS
- 12.2.15 WEBHR
- 12.2.16 EMPLOYWISE
- 12.2.17 SYMPA
- 12.2.18 CLAYHR
- 12.2.19 HCM DECK
- 12.2.20 AKRIVIA HCM
- 12.2.21 KENZ INNOVATION

*Details on Business overview, Products/Solutions/Services offered, Recent developments, MnM view, Right to win, Strategic choices made, and Weaknesses and Competitive threats might not be captured in case of unlisted companies.

13 ADJACENT/RELATED MARKETS

13.1 INTRODUCTION

TABLE 390 ADJACENT MARKETS AND FORECASTS

13.2 LIMITATIONS

13.3 HUMAN CAPITAL MANAGEMENT MARKET ECOSYSTEM AND ADJACENT MARKETS

13.4 CORE HR SOFTWARE MARKET

13.4.1 CORE HR SOFTWARE MARKET, BY COMPONENT

TABLE 391 CORE HR SOFTWARE MARKET, BY COMPONENT, 2018–2022 (USD MILLION)

TABLE 392 CORE HR SOFTWARE MARKET, BY COMPONENT, 2023–2028 (USD MILLION)

13.4.2 CORE HR SOFTWARE MARKET, BY SOFTWARE

TABLE 393 CORE HR SOFTWARE MARKET, BY SOFTWARE, 2018–2022 (USD MILLION)

TABLE 394 CORE HR SOFTWARE MARKET, BY SOFTWARE, 2023–2028 (USD MILLION)

13.4.3 CORE HR SOFTWARE MARKET, BY SERVICE

TABLE 395 CORE HR SOFTWARE MARKET, BY SERVICE, 2018–2022 (USD

MILLION)

TABLE 396 CORE HR SOFTWARE MARKET, BY SERVICE, 2023–2028 (USD
MILLION)

13.5 WORKFORCE MANAGEMENT MARKET

13.5.1 WORKFORCE MANAGEMENT MARKET, BY SOLUTION

TABLE 397 WORKFORCE MANAGEMENT MARKET, BY SOLUTION, 2018–2025
(USD MILLION)

13.5.2 WORKFORCE MANAGEMENT MARKET, BY SERVICE

TABLE 398 WORKFORCE MANAGEMENT MARKET, BY SERVICE, 2018–2025 (USD
MILLION)

14 APPENDIX

14.1 DISCUSSION GUIDE

14.2 KNOWLEDGESTORE: MARKETSANDMARKETS' SUBSCRIPTION PORTAL

14.3 CUSTOMIZATION OPTIONS

14.4 RELATED REPORTS

14.5 AUTHOR DETAILS

I would like to order

Product name: Human Capital Management Market by Offering (Software (Core HR, ATS, HR Analytics, and Workforce Management) and Services), Deployment Model, Organization Size, Vertical (BFSI, Manufacturing, IT & Telecom, Government) & Region - Global Forecast to 2029

Product link: <https://marketpublishers.com/r/H06D03A2826EN.html>

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

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/H06D03A2826EN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:
Last name:
Email:
Company:
Address:
City:
Zip code:
Country:
Tel:
Fax:
Your message:

****All fields are required**

Customer signature _____

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below
and fax the completed form to +44 20 7900 3970