

# **Privileged Access Management Market by Offering, Deployment Mode (On-Premises and Cloud), Vertical (BFSI, Government, IT & Ites, Healthcare, Telecommunications, Manufacturing, Energy & Utilities, Retail & Ecommerce) and Region - Global Forecast to 2028**

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## **Abstracts**

The global Privileged Access Management (PAM) market size is projected to grow from USD 2.9 billion in 2023 to USD 7.7 billion by 2028 at a CAGR of 21.5% during the forecast period. The market growth in PAM is fueled by factors driven by the momentum of digital evolution and the swift migration to cloud-based solutions. The increasing concerns surrounding account and password misuse and the rising peril of internal security breaches have amplified the urgency for advanced PAM systems. Simultaneously, the heightened commitment of enterprises to meet regulatory norms has further strengthened the market's trajectory.

“By offering, the services segment will grow at the highest CAGR during the forecast period.”

The services segment attained the highest CAGR in the PAM market's offering segmentation. As organizations rapidly integrate PAM solutions into their infrastructure, there is an increasing demand for accompanying services, ranging from initial consultations and integration assistance to training and ongoing support. These services ensure that PAM implementations align seamlessly with organizations' specific operational and security needs. Moreover, with threats becoming more sophisticated, businesses are leaning heavily on these services to navigate the complexities and to ensure their privileged access defenses remain resilient and up-to-date. Furthermore,

as regulations intensify and compliance becomes more challenging, professional services aid organizations in maintaining alignment with industry standards and mandates. Thus, the services segment has the highest CAGR during the forecasted period.

“By vertical, the BFSI segment will grow at the largest market size during the forecast period.”

The BFSI vertical has the largest market size in the PAM market. The BFSI sector inherently deals with a vast amount of sensitive data, from personal financial details to critical transactional data. The high value of this data makes it a prime target for cyber adversaries. With increasing digitization and online transactions, the attack surface within this vertical has expanded, necessitating robust cybersecurity measures. PAM solutions, in this context, play a pivotal role in safeguarding privileged accounts that, if compromised, could lead to significant financial and reputational damage. Furthermore, stringent regulatory frameworks and compliance requirements, such as the PCI-DSS and the Basel III norms, mandate that financial institutions maintain the highest data protection standards. To meet these standards and to counteract sophisticated cyber threats, BFSI entities are heavily investing in PAM solutions, thereby driving the predominant market size in this segment.

“North America is expected to account for the largest market size during the forecasted period.”

North America holds the distinction of accounting for the largest market size in the PAM market for several reasons. First, the region houses a plethora of global enterprises and tech hubs, with industries spanning finance, healthcare, and information technology that inherently necessitate robust cybersecurity measures. The increasing frequency and sophistication of cyber-attacks targeting businesses in this region further accentuates the demand for advanced PAM solutions. Additionally, regulatory compliance standards like the GDPR and the California Consumer Privacy Act (CCPA) mandate stringent data protection measures, propelling organizations to invest heavily in PAM systems. Moreover, several leading PAM solution providers in the region encourage innovation, fostering a competitive market landscape. Consequently, the convergence of a tech-intensive corporate ecosystem, regulatory imperatives, and a vibrant vendor landscape positions North America at the forefront of the global PAM market.

“Asia Pacific is anticipated to account for the highest CAGR during the forecasted period.”

The Asia Pacific region is poised to witness the highest CAGR in the PAM market, driven by several factors. Foremost, the region is experiencing a rapid digital transformation, with emerging economies like India embracing digital technologies at an accelerated pace. This digital uptick has consequently expanded the cyber-attack surface, necessitating enhanced cybersecurity measures. Additionally, the proliferation of SMEs in the region, increasingly becoming targets for cyber adversaries, amplifies the need for effective PAM solutions. The regulatory landscape in the Asia Pacific is also evolving, with countries implementing or revising data protection and cybersecurity laws, pushing businesses to prioritize investments in cybersecurity infrastructure. Furthermore, the growing presence and expansion of global PAM solution providers in the region and local vendors innovating tailored solutions bolster the adoption rate. Thus, the dynamic interplay of digitalization, emerging enterprise needs, regulatory shifts, and market innovations fuels the robust CAGR of the PAM market in Asia Pacific.

### Breakdown of primaries

The study contains various industry experts' insights, from suppliers/software developers to OEMs and Tier 1 vendors.

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%, Managerial and Others – 60%

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

The key vendors in the global PAM market include Fortinet (US), Beyond Trust (US), CyberArk (US), Broadcom (US), Imprivata (US), Optiv Security (US), Okta (US), IBM (US), Micro Focus (OpenText) (UK), ManageEngine (Zoho) (US), Hashi Corporation (US), One Identity (US), ARCON (India), Netwrix (US), Delinea (US), Wallix (France), Saviynt (US), Senhasegura (Brazil), KronTech (Turkey), miniOrange (US), EmpowerID (US), StrongDM (US), CyberSolve (US), Opal Security (US), Foxpass (US), Secureden (US), RevBits (US), Silverfort (Israel), and IDM Technologies (UAE).

The study includes in-depth competitive intelligence covering company profiles, recent developments, and key market strategies.

## Research Coverage

The report segments the PAM market and forecasts its size by offerings (solution and services), deployment mode (on-premise and cloud), verticals (BFSI, government, IT & ITeS, healthcare, telecommunications, manufacturing, energy and utilities, retail & eCommerce, media & entertainment, and other verticals), and region (North America, Europe, Asia Pacific, Middle East & Africa, and Latin America).

## 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 PAM market and the subsegments. The 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 (Digital transformation and the accelerated shift to cloud, Account and password-sharing concerns), restraints (Complex implementation, Adaptability, and budgetary issues), opportunities (Remote work & third-party access, Escalation of cybersecurity threats), and challenges (Account management and activity tracking, Lack of granularity).

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

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

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

**Competitive Assessment:** In-depth assessment of market shares, growth strategies, and service offerings of leading players like Fortinet (US), Beyond

Trust (US), CyberArk (US), Broadcom (US), Imprivata (US), Optiv Security (US), and ManageEngine (Zoho) (US) among others in the PAM market strategies.

## 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, 2017–2021
- 1.6 STAKEHOLDERS

### 2 RESEARCH METHODOLOGY

- 2.1 RESEARCH DATA
  - FIGURE 1 PRIVILEGED ACCESS MANAGEMENT MARKET: RESEARCH DESIGN
    - 2.1.1 SECONDARY DATA
    - 2.1.2 PRIMARY DATA
      - 2.1.2.1 Breakup of primaries
      - 2.1.2.2 Key industry insights
  - 2.2 DATA TRIANGULATION
    - FIGURE 2 PRIVILEGED ACCESS MANAGEMENT MARKET: DATA TRIANGULATION
  - 2.3 MARKET SIZE ESTIMATION
    - 2.3.1 TOP-DOWN APPROACH
      - FIGURE 3 TOP-DOWN (APPROACH 1): MARKET SIZE ESTIMATION METHODOLOGY (SUPPLY-SIDE)
      - FIGURE 4 APPROACH 1 (SUPPLY-SIDE) ANALYSIS
      - FIGURE 5 PRIVILEGED ACCESS MANAGEMENT MARKET ESTIMATION: RESEARCH FLOW
    - 2.3.2 BOTTOM-UP APPROACH
      - FIGURE 6 BOTTOM-UP (APPROACH 2): MARKET SIZE ESTIMATION METHODOLOGY (DEMAND-SIDE)
  - 2.4 MARKET FORECAST
    - TABLE 2 FACTOR ANALYSIS
  - 2.5 COMPANY EVALUATION QUADRANT METHODOLOGY
    - 2.5.1 FOR LARGE PLAYERS

FIGURE 7 KEY COMPANY EVALUATION MATRIX: CRITERIA WEIGHTAGE

2.5.2 FOR STARTUPS

FIGURE 8 STARTUP EVALUATION: CRITERIA WEIGHTAGE

2.6 RESEARCH ASSUMPTIONS

TABLE 3 PAM MARKET: RESEARCH ASSUMPTIONS

2.7 LIMITATIONS AND RISK ASSESSMENT

TABLE 4 PAM MARKET: LIMITATIONS AND RISK ASSESSMENT

### **3 EXECUTIVE SUMMARY**

FIGURE 9 KEY COMPONENTS OF PAM

FIGURE 10 PRIVILEGED ACCESS MANAGEMENT MARKET TO WITNESS  
SIGNIFICANT GROWTH DURING FORECAST PERIOD

FIGURE 11 PRIVILEGED ACCESS MANAGEMENT MARKET: SEGMENTAL  
SNAPSHOT, 2023–2028

FIGURE 12 PRIVILEGED ACCESS MANAGEMENT MARKET: REGIONAL  
SNAPSHOT

### **4 PREMIUM INSIGHTS**

4.1 ATTRACTIVE OPPORTUNITIES FOR PRIVILEGED ACCESS MANAGEMENT  
MARKET PLAYERS

FIGURE 13 DIGITAL TRANSFORMATION, ALONG WITH ACCELERATED SHIFT TO  
CLOUD, TO BOOST MARKET GROWTH

4.2 PRIVILEGED ACCESS MANAGEMENT MARKET, BY OFFERING

FIGURE 14 PRIVILEGED ACCESS MANAGEMENT SOLUTIONS TO BE LARGER  
MARKET THAN SERVICES DURING FORECAST PERIOD

4.3 PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE

FIGURE 15 CLOUD DEPLOYMENT TO PREFERRED OVER ON-PREMISE USE  
DURING FORECAST PERIOD

4.4 PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2023–2028

FIGURE 16 BFSI VERTICAL TO BE LARGEST MARKET SIZE DURING FORECAST  
PERIOD

4.5 PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION

FIGURE 17 ACCESS CONTROL TO BE LARGEST SOLUTION MARKET DURING  
FORECAST PERIOD

4.6 PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE

FIGURE 18 PROFESSIONAL SERVICES TO BE LARGER MARKET THAN  
MANAGED SERVICES DURING FORECAST PERIOD

#### 4.7 MARKET INVESTMENT SCENARIO

FIGURE 19 ASIA PACIFIC TO EMERGE AS BEST MARKET FOR INVESTMENTS IN NEXT FIVE YEARS

### 5 MARKET OVERVIEW AND INDUSTRY TRENDS

#### 5.1 INTRODUCTION

#### 5.2 MARKET DYNAMICS

FIGURE 20 PRIVILEGED ACCESS MANAGEMENT MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES

##### 5.2.1 DRIVERS

- 5.2.1.1 Focus on digital transformation and accelerated shift to cloud
- 5.2.1.2 Increase in account and password-sharing concerns
- 5.2.1.3 Rise in menace of insider threats
- 5.2.1.4 Greater adherence to regulatory standards

##### 5.2.2 RESTRAINTS

- 5.2.2.1 Complex implementation of legacy systems or solutions
- 5.2.2.2 Adaptability and budgetary issues

##### 5.2.3 OPPORTUNITIES

- 5.2.3.1 Privilege for remote work & third-party access
- 5.2.3.2 Escalation of cybersecurity threats
- 5.2.3.3 Provision of education, training, and innovative technologies

##### 5.2.4 CHALLENGES

- 5.2.4.1 Difficulty in account management and activity tracking
- 5.2.4.2 Lack of granularity
- 5.2.4.3 Insufficient threat analysis and access control in diverse platforms
- 5.2.4.4 Issues in system integration and interoperability

#### 5.3 PRIVILEGED ACCESS MANAGEMENT: EVOLUTION

#### 5.4 PRIVILEGED ACCESS MANAGEMENT: FRAMEWORK

FIGURE 21 STRATEGIC FRAMEWORK FOR COMPREHENSIVE PRIVILEGED ACCESS MANAGEMENT

#### 5.5 CASE STUDY ANALYSIS

5.5.1 VLI INTEGRATED WITH IBM'S PAM SUITE FOR PROTECTION AGAINST UNAUTHORIZED PRIVILEGED ACCESS AND ENHANCED AUDIT TRAILS

5.5.2 KRON TECHNOLOGIES' AGENTLESS "SINGLE CONNECT" SOLUTION OFFERED SEAMLESS, UNIFIED ACCESS MANAGEMENT, REDUCING PROJECT IMPLEMENTATION TIME

5.5.3 BEYONDTRUST'S ENDPOINT PRIVILEGE MANAGEMENT OFFERED POLICY-DRIVEN CONTROLS FOR ROBUST SECURITY TO ZENSAR



- 5.5.4 DELINEA HELPED ROBERT WEED CORPORATION ENSURE BETTER PROCESS CONTROL AND INCREASE PROTECTION FOR ASSETS
- 5.6 PRIVILEGED ACCESS MANAGEMENT MARKET: BEST PRACTICES
- FIGURE 22 PRIVILEGED ACCESS MANAGEMENT MARKET: BEST PRACTICES
  - 5.6.1 BENEFITS OF USING PRIVILEGED ACCESS MANAGEMENT
- 5.7 VALUE CHAIN ANALYSIS
- FIGURE 23 VALUE CHAIN ANALYSIS
- 5.8 ECOSYSTEM ANALYSIS
- FIGURE 24 KEY PLAYERS IN PRIVILEGED ACCESS MANAGEMENT MARKET ECOSYSTEM
- TABLE 5 PRIVILEGED ACCESS MANAGEMENT MARKET: ECOSYSTEM
- 5.9 PORTER'S FIVE FORCES MODEL ANALYSIS
- FIGURE 25 PORTER'S FIVE FORCES ANALYSIS
- TABLE 6 PORTER'S FIVE FORCES IMPACT ON PAM MARKET
  - 5.9.1 THREAT OF NEW ENTRANTS
  - 5.9.2 BARGAINING POWER OF SUPPLIERS
  - 5.9.3 BARGAINING POWER OF BUYERS
  - 5.9.4 THREAT OF SUBSTITUTES
  - 5.9.5 INTENSITY OF COMPETITIVE RIVALRY
- 5.10 PRICING ANALYSIS
  - 5.10.1 AVERAGE SELLING PRICE TREND OF KEY PLAYERS, BY OFFERING
  - FIGURE 26 AVERAGE SELLING PRICE TREND OF KEY PLAYERS FOR TOP THREE OFFERINGS
  - TABLE 7 AVERAGE SELLING PRICE TREND OF KEY PLAYERS, BY OFFERING
  - 5.10.2 INDICATIVE PRICING ANALYSIS, BY SOLUTION
  - TABLE 8 MINIORANGE PAM SOLUTION
  - FIGURE 27 INDICATIVE PRICING OF MINIORANGE PAM SOLUTION
  - TABLE 9 EMPOWERID PAM SOLUTION
  - FIGURE 28 INDICATIVE PRICING OF EMPOWERID PAM SOLUTION
- 5.11 TECHNOLOGY ANALYSIS
  - 5.11.1 AI AND ML TECHNOLOGIES INTEGRATED WITH PAM
  - 5.11.2 ZERO-TRUST SECURITY MODEL AND PAM
  - 5.11.3 INTEGRATION OF CLOUD TECHNOLOGY IN PAM
  - 5.11.4 ADVANCEMENTS IN PAM WITH BEHAVIORAL ANALYTICS
  - 5.11.5 BLOCKCHAIN TECHNOLOGY INTEGRATED WITH PAM
- 5.12 PATENT ANALYSIS
- FIGURE 29 NUMBER OF PATENTS GRANTED FOR PRIVILEGED ACCESS MANAGEMENT MARKET, 2013-2023
- FIGURE 30 REGIONAL ANALYSIS OF PATENTS GRANTED FOR PRIVILEGED

## ACCESS MANAGEMENT MARKET

TABLE 10 LIST OF FEW PATENTS IN PRIVILEGED ACCESS MANAGEMENT MARKET, 2021–2023

5.13 TRENDS/DISRUPTIONS IMPACTING CUSTOMER'S BUSINESS

FIGURE 31 TRENDS/DISRUPTIONS IMPACTING CUSTOMERS' BUSINESSES

5.14 BUSINESS MODEL

TABLE 11 PAM MARKET: BUSINESS MODEL

5.15 REGULATORY LANDSCAPE

5.15.1 PAYMENT CARD INDUSTRY-DATA SECURITY STANDARD (PCI-DSS)

5.15.2 HEALTH INSURANCE PORTABILITY AND ACCOUNTABILITY ACT (HIPAA)

5.15.3 FEDERAL INFORMATION SECURITY MANAGEMENT ACT (FISMA)

5.15.4 SARBANES-OXLEY ACT (SOX)

5.15.5 SOC2

5.15.6 REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 12 NORTH AMERICA: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 13 EUROPE: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 14 ASIA PACIFIC: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 15 MIDDLE EAST & AFRICA: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 16 LATIN AMERICA: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

5.16 KEY STAKEHOLDERS AND BUYING CRITERIA

5.16.1 KEY STAKEHOLDERS IN BUYING PROCESS

FIGURE 32 INFLUENCE OF STAKEHOLDERS IN BUYING PROCESS FOR TOP THREE APPLICATIONS

TABLE 17 INFLUENCE OF STAKEHOLDERS IN BUYING PROCESS FOR TOP THREE APPLICATIONS

5.16.2 BUYING CRITERIA

FIGURE 33 KEY BUYING CRITERIA FOR TOP THREE APPLICATIONS

TABLE 18 KEY BUYING CRITERION FOR TOP THREE APPLICATIONS

5.17 KEY CONFERENCES AND EVENTS

TABLE 19 PRIVILEGED ACCESS MANAGEMENT MARKET: DETAILED LIST OF CONFERENCES & EVENTS, 2023–2025

## 6 PRIVILEGED ACCESS MANAGEMENT MARKET, BY OFFERING

## 6.1 INTRODUCTION

6.1.1 OFFERINGS: PRIVILEGED ACCESS MANAGEMENT MARKET DRIVERS  
FIGURE 34 SOLUTIONS SEGMENT TO LEAD MARKET DURING FORECAST PERIOD

TABLE 20 PRIVILEGED ACCESS MANAGEMENT MARKET, BY OFFERING, 2017–2022 (USD MILLION)

TABLE 21 PRIVILEGED ACCESS MANAGEMENT MARKET, BY OFFERING, 2023–2028 (USD MILLION)

## 6.2 SOLUTIONS

TABLE 22 PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION, 2017–2022 (USD MILLION)

TABLE 23 PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION, 2023–2028 (USD MILLION)

TABLE 24 SOLUTIONS: PRIVILEGED ACCESS MANAGEMENT MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 25 SOLUTIONS: PRIVILEGED ACCESS MANAGEMENT MARKET, BY REGION, 2023–2028 (USD MILLION)

### 6.2.1 PASSWORD MANAGEMENT

6.2.1.1 Dire need to thwart unauthorized access and potential breaches to drive market

### 6.2.2 SESSION MANAGEMENT

6.2.2.1 Heightened threats and insider attacks to boost market

### 6.2.3 ACCESS CONTROL

6.2.3.1 Rise in cyber threats and business imperatives to drive market

### 6.2.4 PRIVILEGED ELEVATION & DELEGATION

6.2.4.1 Leveraging fine-grained policies and real-time decision-making mechanisms to help reduce risk of privileged credential abuse

### 6.2.5 COMPLIANCE & REPORTING

6.2.5.1 Need to avoid regulatory penalties and ensuring robust cybersecurity hygiene to propel growth

### 6.2.6 PRIVILEGED IDENTITY MANAGEMENT

6.2.6.1 Facilitating tracking of ownership and entitlements to ensure clarity and accountability to drive growth

## 6.3 SERVICES

TABLE 26 PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE, 2017–2022 (USD MILLION)

TABLE 27 PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE, 2023–2028 (USD MILLION)

TABLE 28 SERVICES: PRIVILEGED ACCESS MANAGEMENT MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 29 SERVICES: PRIVILEGED ACCESS MANAGEMENT MARKET, BY REGION, 2023–2028 (USD MILLION)

#### 6.3.1 PROFESSIONAL

6.3.1.1 Growing emphasis on expertise-driven implementation and regulatory compliance to drive market

TABLE 30 PROFESSIONAL SERVICES: PRIVILEGED ACCESS MANAGEMENT MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 31 PROFESSIONAL SERVICES: PRIVILEGED ACCESS MANAGEMENT MARKET, BY REGION, 2023–2028 (USD MILLION)

#### 6.3.2 MANAGED

6.3.2.1 Need for round-clock protection against threats and swift response to issues to encourage market expansion

TABLE 32 MANAGED SERVICES: PRIVILEGED ACCESS MANAGEMENT MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 33 MANAGED SERVICES: PRIVILEGED ACCESS MANAGEMENT MARKET, BY REGION, 2023–2028 (USD MILLION)

## 7 PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE

### 7.1 INTRODUCTION

7.1.1 DEPLOYMENT MODES: PRIVILEGED ACCESS MANAGEMENT MARKET DRIVERS

FIGURE 35 CLOUD DEPLOYMENT MODE TO LEAD MARKET DURING FORECAST PERIOD

TABLE 34 PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2017–2022 (USD MILLION)

TABLE 35 PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2023–2028 (USD MILLION)

### 7.2 ON-PREMISES

7.2.1 NEED FOR ROBUST, IN-HOUSE PRIVILEGED ACCESS SECURITY IN FINANCE AND HEALTHCARE TO BOLSTER GROWTH

TABLE 36 ON-PREMISES: PRIVILEGED ACCESS MANAGEMENT MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 37 ON-PREMISES: PRIVILEGED ACCESS MANAGEMENT MARKET, BY REGION, 2023–2028 (USD MILLION)

### 7.3 CLOUD

7.3.1 EMPHASIS ON ACCESS TO LATEST SECURITY FEATURES AND THREAT

INTELLIGENCE WITHOUT MANUAL HASSLE TO BOOST GROWTH

TABLE 38 CLOUD: PRIVILEGED ACCESS MANAGEMENT MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 39 CLOUD: PRIVILEGED ACCESS MANAGEMENT MARKET, BY REGION, 2023–2028 (USD MILLION)

## **8 PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL**

### **8.1 INTRODUCTION**

8.1.1 VERTICALS: PRIVILEGED ACCESS MANAGEMENT MARKET DRIVERS

FIGURE 36 HEALTHCARE VERTICAL TO ACHIEVE HIGHER GROWTH DURING FORECAST PERIOD

TABLE 40 PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2017–2022 (USD MILLION)

TABLE 41 PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2023–2028 (USD MILLION)

### **8.2 BANKING, FINANCIAL SERVICES, AND INSURANCE (BFSI)**

8.2.1 FOCUS ON SHIELDING PRIVILEGED CREDENTIALS AND PROVIDING DATA ACCESS TO AUTHORIZED INDIVIDUALS TO FUEL GROWTH

TABLE 42 BFSI: PRIVILEGED ACCESS MANAGEMENT MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 43 BFSI: PRIVILEGED ACCESS MANAGEMENT MARKET, BY REGION, 2023–2028 (USD MILLION)

### **8.3 GOVERNMENT**

8.3.1 EMPHASIS ON NATIONAL SECURITY, PUBLIC TRUST, AND INFRASTRUCTURE PROTECTION TO DRIVE ADOPTION OF PRIVILEGED ACCESS MANAGEMENT

TABLE 44 GOVERNMENT: PRIVILEGED ACCESS MANAGEMENT MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 45 GOVERNMENT: PRIVILEGED ACCESS MANAGEMENT MARKET, BY REGION, 2023–2028 (USD MILLION)

### **8.4 IT & ITES**

8.4.1 TARGETING PASSWORD VAULTING, SESSION MONITORING, AND GRANULAR ACCESS TO MITIGATE RISK CONTROL TO FUEL GROWTH

TABLE 46 IT & ITES: PRIVILEGED ACCESS MANAGEMENT MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 47 IT & ITES: PRIVILEGED ACCESS MANAGEMENT MARKET, BY REGION, 2023–2028 (USD MILLION)

### **8.5 HEALTHCARE**

8.5.1 FOCUS ON SECURING PATIENT'S HEALTH DATA, ENSURING COMPLIANCE, AND MAINTAINING PATIENT TRUST TO PROPEL GROWTH  
TABLE 48 HEALTHCARE: PRIVILEGED ACCESS MANAGEMENT MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 49 HEALTHCARE: PRIVILEGED ACCESS MANAGEMENT MARKET, BY REGION, 2023–2028 (USD MILLION)

## 8.6 TELECOMMUNICATIONS

8.6.1 ENSURING UNINTERRUPTED SERVICE AND SAFEGUARD CRITICAL DATA TO PROPEL GROWTH

TABLE 50 TELECOMMUNICATIONS: PRIVILEGED ACCESS MANAGEMENT MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 51 TELECOMMUNICATIONS: PRIVILEGED ACCESS MANAGEMENT MARKET, BY REGION, 2023–2028 (USD MILLION)

## 8.7 MANUFACTURING

8.7.1 ADOPTION OF SOLUTIONS AS ESSENTIAL TOOLS TO PROVIDE MFA AND RBAC CAPABILITIES TO FUEL MARKET

TABLE 52 MANUFACTURING: PRIVILEGED ACCESS MANAGEMENT MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 53 MANUFACTURING: PRIVILEGED ACCESS MANAGEMENT MARKET, BY REGION, 2023–2028 (USD MILLION)

## 8.8 ENERGY & UTILITIES

8.8.1 GRANULAR CONTROL OVER PRIVILEGED USER ACCESS TO SAFEGUARD AGAINST MALICIOUS THREATS WITH AGING INFRASTRUCTURE TO FUEL MARKET

TABLE 54 ENERGY & UTILITIES: PRIVILEGED ACCESS MANAGEMENT MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 55 ENERGY & UTILITIES: PRIVILEGED ACCESS MANAGEMENT MARKET, BY REGION, 2023–2028 (USD MILLION)

## 8.9 RETAIL & ECOMMERCE

8.9.1 EXPANDING ECOMMERCE PLATFORMS AND NEED FOR ROBUST DATA SECURITY TO DRIVE DEMAND

TABLE 56 RETAIL & ECOMMERCE: PRIVILEGED ACCESS MANAGEMENT MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 57 RETAIL & ECOMMERCE: PRIVILEGED ACCESS MANAGEMENT MARKET, BY REGION, 2023–2028 (USD MILLION)

## 8.10 MEDIA & ENTERTAINMENT

8.10.1 RISE IN TRAFFIC IN ONLINE STREAMING SITES TO DRIVE ADOPTION OF PRIVILEGED ACCESS MANAGEMENT

TABLE 58 MEDIA & ENTERTAINMENT: PRIVILEGED ACCESS MANAGEMENT

MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 59 MEDIA & ENTERTAINMENT: PRIVILEGED ACCESS MANAGEMENT

MARKET, BY REGION, 2023–2028 (USD MILLION)

8.11 OTHER VERTICALS

## **9 PRIVILEGED ACCESS MANAGEMENT MARKET, BY REGION**

### 9.1 INTRODUCTION

FIGURE 37 ASIA PACIFIC TO GROW AT HIGHEST CAGR DURING FORECAST PERIOD

TABLE 60 PRIVILEGED ACCESS MANAGEMENT MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 61 PRIVILEGED ACCESS MANAGEMENT MARKET, BY REGION, 2023–2028 (USD MILLION)

### 9.2 NORTH AMERICA

9.2.1 NORTH AMERICA: PRIVILEGED ACCESS MANAGEMENT MARKET DRIVERS

9.2.2 NORTH AMERICA: REGULATORY LANDSCAPE

FIGURE 38 NORTH AMERICA: MARKET SNAPSHOT

TABLE 62 NORTH AMERICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY OFFERING, 2017–2022 (USD MILLION)

TABLE 63 NORTH AMERICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY OFFERING, 2023–2028 (USD MILLION)

TABLE 64 NORTH AMERICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION, 2017–2022 (USD MILLION)

TABLE 65 NORTH AMERICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION, 2023–2028 (USD MILLION)

TABLE 66 NORTH AMERICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE, 2017–2022 (USD MILLION)

TABLE 67 NORTH AMERICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE, 2023–2028 (USD MILLION)

TABLE 68 NORTH AMERICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2017–2022 (USD MILLION)

TABLE 69 NORTH AMERICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2023–2028 (USD MILLION)

TABLE 70 NORTH AMERICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2017–2022 (USD MILLION)

TABLE 71 NORTH AMERICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2023–2028 (USD MILLION)

TABLE 72 NORTH AMERICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY COUNTRY, 2017–2022 (USD MILLION)

TABLE 73 NORTH AMERICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY COUNTRY, 2023–2028 (USD MILLION)

### 9.2.3 US

9.2.3.1 Increase in emphasis on adopting advanced solutions such as MFA and policy-based remote access control to drive growth

TABLE 74 US: PRIVILEGED ACCESS MANAGEMENT MARKET, BY OFFERING, 2017–2022 (USD MILLION)

TABLE 75 US: PRIVILEGED ACCESS MANAGEMENT MARKET, BY OFFERING, 2023–2028 (USD MILLION)

TABLE 76 US: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION, 2017–2022 (USD MILLION)

TABLE 77 US: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION, 2023–2028 (USD MILLION)

TABLE 78 US: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE, 2017–2022 (USD MILLION)

TABLE 79 US: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE, 2023–2028 (USD MILLION)

TABLE 80 US: PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2017–2022 (USD MILLION)

TABLE 81 US: PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2023–2028 (USD MILLION)

TABLE 82 US: PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2017–2022 (USD MILLION)

TABLE 83 US: PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2023–2028 (USD MILLION)

### 9.2.4 CANADA

9.2.4.1 Integration of ML and AI for predictive threat analysis and real-time response to drive demand

TABLE 84 CANADA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY OFFERING, 2017–2022 (USD MILLION)

TABLE 85 CANADA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY OFFERING, 2023–2028 (USD MILLION)

TABLE 86 CANADA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION, 2017–2022 (USD MILLION)

TABLE 87 CANADA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION, 2023–2028 (USD MILLION)

TABLE 88 CANADA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE,



2017–2022 (USD MILLION)

TABLE 89 CANADA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE, 2023–2028 (USD MILLION)

TABLE 90 CANADA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2017–2022 (USD MILLION)

TABLE 91 CANADA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2023–2028 (USD MILLION)

TABLE 92 CANADA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2017–2022 (USD MILLION)

TABLE 93 CANADA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2023–2028 (USD MILLION)

### 9.3 EUROPE

9.3.1 EUROPE: PRIVILEGED ACCESS MANAGEMENT MARKET DRIVERS

9.3.2 EUROPE: REGULATORY LANDSCAPE

TABLE 94 EUROPE: PRIVILEGED ACCESS MANAGEMENT MARKET, BY OFFERING, 2017–2022 (USD MILLION)

TABLE 95 EUROPE: PRIVILEGED ACCESS MANAGEMENT MARKET, BY OFFERING, 2023–2028 (USD MILLION)

TABLE 96 EUROPE: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION, 2017–2022 (USD MILLION)

TABLE 97 EUROPE: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION, 2023–2028 (USD MILLION)

TABLE 98 EUROPE: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE, 2017–2022 (USD MILLION)

TABLE 99 EUROPE: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE, 2023–2028 (USD MILLION)

TABLE 100 EUROPE: PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2017–2022 (USD MILLION)

TABLE 101 EUROPE: PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2023–2028 (USD MILLION)

TABLE 102 EUROPE: PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2017–2022 (USD MILLION)

TABLE 103 EUROPE: PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2023–2028 (USD MILLION)

TABLE 104 EUROPE: PRIVILEGED ACCESS MANAGEMENT MARKET, BY COUNTRY, 2017–2022 (USD MILLION)

TABLE 105 EUROPE: PRIVILEGED ACCESS MANAGEMENT MARKET, BY COUNTRY, 2023–2028 (USD MILLION)

9.3.3 UK

9.3.3.1 Heightened DDoS risks, ransomware, and data extortion to drive demand for privileged access management

TABLE 106 UK: PRIVILEGED ACCESS MANAGEMENT MARKET, BY OFFERING, 2017–2022 (USD MILLION)

TABLE 107 UK: PRIVILEGED ACCESS MANAGEMENT MARKET, BY OFFERING, 2023–2028 (USD MILLION)

TABLE 108 UK: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION, 2017–2022 (USD MILLION)

TABLE 109 UK: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION, 2023–2028 (USD MILLION)

TABLE 110 UK: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE, 2017–2022 (USD MILLION)

TABLE 111 UK: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE, 2023–2028 (USD MILLION)

TABLE 112 UK: PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2017–2022 (USD MILLION)

TABLE 113 UK: PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2023–2028 (USD MILLION)

TABLE 114 UK: PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2017–2022 (USD MILLION)

TABLE 115 UK: PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2023–2028 (USD MILLION)

#### 9.3.4 GERMANY

9.3.4.1 Adoption of security tools such as identity governance, MFA, and threat analytics to boost growth

TABLE 116 GERMANY: PRIVILEGED ACCESS MANAGEMENT MARKET, BY OFFERING, 2017–2022 (USD MILLION)

TABLE 117 GERMANY: PRIVILEGED ACCESS MANAGEMENT MARKET, BY OFFERING, 2023–2028 (USD MILLION)

TABLE 118 GERMANY: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION, 2017–2022 (USD MILLION)

TABLE 119 GERMANY: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION, 2023–2028 (USD MILLION)

TABLE 120 GERMANY: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE, 2017–2022 (USD MILLION)

TABLE 121 GERMANY: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE, 2023–2028 (USD MILLION)

TABLE 122 GERMANY: PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2017–2022 (USD MILLION)

TABLE 123 GERMANY: PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2023–2028 (USD MILLION)

TABLE 124 GERMANY: PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2017–2022 (USD MILLION)

TABLE 125 GERMANY: PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2023–2028 (USD MILLION)

### 9.3.5 FRANCE

9.3.5.1 Shift from static to dynamic cybersecurity postures and higher adoption of IAM technologies to encourage market expansion

TABLE 126 FRANCE: PRIVILEGED ACCESS MANAGEMENT MARKET, BY OFFERING, 2017–2022 (USD MILLION)

TABLE 127 FRANCE: PRIVILEGED ACCESS MANAGEMENT MARKET, BY OFFERING, 2023–2028 (USD MILLION)

TABLE 128 FRANCE: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION, 2017–2022 (USD MILLION)

TABLE 129 FRANCE: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION, 2023–2028 (USD MILLION)

TABLE 130 FRANCE: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE, 2017–2022 (USD MILLION)

TABLE 131 FRANCE: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE, 2023–2028 (USD MILLION)

TABLE 132 FRANCE: PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2017–2022 (USD MILLION)

TABLE 133 FRANCE: PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2023–2028 (USD MILLION)

TABLE 134 FRANCE: PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2017–2022 (USD MILLION)

TABLE 135 FRANCE: PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2023–2028 (USD MILLION)

### 9.3.6 ITALY

9.3.6.1 Influence of technological investments, regulatory imperatives, and evolving work nature to boost growth

TABLE 136 ITALY: PRIVILEGED ACCESS MANAGEMENT MARKET, BY OFFERING, 2017–2022 (USD MILLION)

TABLE 137 ITALY: PRIVILEGED ACCESS MANAGEMENT MARKET, BY OFFERING, 2023–2028 (USD MILLION)

TABLE 138 ITALY: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION, 2017–2022 (USD MILLION)

TABLE 139 ITALY: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION,

2023–2028 (USD MILLION)

TABLE 140 ITALY: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE, 2017–2022 (USD MILLION)

TABLE 141 ITALY: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE, 2023–2028 (USD MILLION)

TABLE 142 ITALY: PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2017–2022 (USD MILLION)

TABLE 143 ITALY: PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2023–2028 (USD MILLION)

TABLE 144 ITALY: PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2017–2022 (USD MILLION)

TABLE 145 ITALY: PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2023–2028 (USD MILLION)

#### 9.3.7 REST OF EUROPE

TABLE 146 REST OF EUROPE: PRIVILEGED ACCESS MANAGEMENT MARKET, BY OFFERING, 2017–2022 (USD MILLION)

TABLE 147 REST OF EUROPE: PRIVILEGED ACCESS MANAGEMENT MARKET, BY OFFERING, 2023–2028 (USD MILLION)

TABLE 148 REST OF EUROPE: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION, 2017–2022 (USD MILLION)

TABLE 149 REST OF EUROPE: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION, 2023–2028 (USD MILLION)

TABLE 150 REST OF EUROPE: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE, 2017–2022 (USD MILLION)

TABLE 151 REST OF EUROPE: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE, 2023–2028 (USD MILLION)

TABLE 152 REST OF EUROPE: PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2017–2022 (USD MILLION)

TABLE 153 REST OF EUROPE: PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2023–2028 (USD MILLION)

TABLE 154 REST OF EUROPE: PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2017–2022 (USD MILLION)

TABLE 155 REST OF EUROPE: PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2023–2028 (USD MILLION)

#### 9.4 ASIA PACIFIC

##### 9.4.1 ASIA PACIFIC: PRIVILEGED ACCESS MANAGEMENT MARKET DRIVERS

##### 9.4.2 ASIA PACIFIC: REGULATORY LANDSCAPE

FIGURE 39 ASIA PACIFIC: MARKET SNAPSHOT

TABLE 156 ASIA PACIFIC: PRIVILEGED ACCESS MANAGEMENT MARKET, BY

OFFERING, 2017–2022 (USD MILLION)

TABLE 157 ASIA PACIFIC: PRIVILEGED ACCESS MANAGEMENT MARKET, BY OFFERING, 2023–2028 (USD MILLION)

TABLE 158 ASIA PACIFIC: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION, 2017–2022 (USD MILLION)

TABLE 159 ASIA PACIFIC: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION, 2023–2028 (USD MILLION)

TABLE 160 ASIA PACIFIC: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE, 2017–2022 (USD MILLION)

TABLE 161 ASIA PACIFIC: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE, 2023–2028 (USD MILLION)

TABLE 162 ASIA PACIFIC: PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2017–2022 (USD MILLION)

TABLE 163 ASIA PACIFIC: PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2023–2028 (USD MILLION)

TABLE 164 ASIA PACIFIC: PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2017–2022 (USD MILLION)

TABLE 165 ASIA PACIFIC: PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2023–2028 (USD MILLION)

TABLE 166 ASIA PACIFIC: PRIVILEGED ACCESS MANAGEMENT MARKET, BY COUNTRY, 2017–2022 (USD MILLION)

TABLE 167 ASIA PACIFIC: PRIVILEGED ACCESS MANAGEMENT MARKET, BY COUNTRY, 2023–2028 (USD MILLION)

#### 9.4.3 CHINA

9.4.3.1 Technological prowess and evolving regulatory measures to drive market

TABLE 168 CHINA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY OFFERING, 2017–2022 (USD MILLION)

TABLE 169 CHINA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY OFFERING, 2023–2028 (USD MILLION)

TABLE 170 CHINA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION, 2017–2022 (USD MILLION)

TABLE 171 CHINA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION, 2023–2028 (USD MILLION)

TABLE 172 CHINA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE, 2017–2022 (USD MILLION)

TABLE 173 CHINA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE, 2023–2028 (USD MILLION)

TABLE 174 CHINA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2017–2022 (USD MILLION)

TABLE 175 CHINA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2023–2028 (USD MILLION)

TABLE 176 CHINA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2017–2022 (USD MILLION)

TABLE 177 CHINA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2023–2028 (USD MILLION)

#### 9.4.4 JAPAN

9.4.4.1 Growth in complexity of cyberattacks in various organizations to bolster growth

TABLE 178 JAPAN: PRIVILEGED ACCESS MANAGEMENT MARKET, BY OFFERING, 2017–2022 (USD MILLION)

TABLE 179 JAPAN: PRIVILEGED ACCESS MANAGEMENT MARKET, BY OFFERING, 2023–2028 (USD MILLION)

TABLE 180 JAPAN: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION, 2017–2022 (USD MILLION)

TABLE 181 JAPAN: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION, 2023–2028 (USD MILLION)

TABLE 182 JAPAN: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE, 2017–2022 (USD MILLION)

TABLE 183 JAPAN: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE, 2023–2028 (USD MILLION)

TABLE 184 JAPAN: PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2017–2022 (USD MILLION)

TABLE 185 JAPAN: PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2023–2028 (USD MILLION)

TABLE 186 JAPAN: PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2017–2022 (USD MILLION)

TABLE 187 JAPAN: PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2023–2028 (USD MILLION)

#### 9.4.5 INDIA

9.4.5.1 Strong government initiative on digital India to secure stored and accessed data to fuel growth

TABLE 188 INDIA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY OFFERING, 2017–2022 (USD MILLION)

TABLE 189 INDIA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY OFFERING, 2023–2028 (USD MILLION)

TABLE 190 INDIA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION, 2017–2022 (USD MILLION)

TABLE 191 INDIA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION,

2023–2028 (USD MILLION)

TABLE 192 INDIA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE, 2017–2022 (USD MILLION)

TABLE 193 INDIA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE, 2023–2028 (USD MILLION)

TABLE 194 INDIA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2017–2022 (USD MILLION)

TABLE 195 INDIA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2023–2028 (USD MILLION)

TABLE 196 INDIA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2017–2022 (USD MILLION)

TABLE 197 INDIA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2023–2028 (USD MILLION)

#### 9.4.6 SINGAPORE

9.4.6.1 Singapore's digital ambitions amplify imperative for PAM amid rising cybersecurity threats to drive market

TABLE 198 SINGAPORE: PRIVILEGED ACCESS MANAGEMENT MARKET, BY OFFERING, 2017–2022 (USD MILLION)

TABLE 199 SINGAPORE: PRIVILEGED ACCESS MANAGEMENT MARKET, BY OFFERING, 2023–2028 (USD MILLION)

TABLE 200 SINGAPORE: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION, 2017–2022 (USD MILLION)

TABLE 201 SINGAPORE: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION, 2023–2028 (USD MILLION)

TABLE 202 SINGAPORE: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE, 2017–2022 (USD MILLION)

TABLE 203 SINGAPORE: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE, 2023–2028 (USD MILLION)

TABLE 204 SINGAPORE: PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2017–2022 (USD MILLION)

TABLE 205 SINGAPORE: PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2023–2028 (USD MILLION)

TABLE 206 SINGAPORE: PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2017–2022 (USD MILLION)

TABLE 207 SINGAPORE: PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2023–2028 (USD MILLION)

#### 9.4.7 AUSTRALIA & NEW ZEALAND

9.4.7.1 Surging cyber threats and data security concerns to drive adoption of Privileged Access Management Market solutions

TABLE 208 AUSTRALIA & NEW ZEALAND: PRIVILEGED ACCESS MANAGEMENT MARKET, BY OFFERING, 2017–2022 (USD MILLION)

TABLE 209 AUSTRALIA & NEW ZEALAND: PRIVILEGED ACCESS MANAGEMENT MARKET, BY OFFERING, 2023–2028 (USD MILLION)

TABLE 210 AUSTRALIA & NEW ZEALAND: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION, 2017–2022 (USD MILLION)

TABLE 211 AUSTRALIA & NEW ZEALAND: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION, 2023–2028 (USD MILLION)

TABLE 212 AUSTRALIA & NEW ZEALAND: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE, 2017–2022 (USD MILLION)

TABLE 213 AUSTRALIA & NEW ZEALAND: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE, 2023–2028 (USD MILLION)

TABLE 214 AUSTRALIA & NEW ZEALAND: PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2017–2022 (USD MILLION)

TABLE 215 AUSTRALIA & NEW ZEALAND: PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2023–2028 (USD MILLION)

TABLE 216 AUSTRALIA & NEW ZEALAND: PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2017–2022 (USD MILLION)

TABLE 217 AUSTRALIA & NEW ZEALAND: PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2023–2028 (USD MILLION)

#### 9.4.8 REST OF ASIA PACIFIC

TABLE 218 REST OF ASIA PACIFIC: PRIVILEGED ACCESS MANAGEMENT MARKET, BY OFFERING, 2017–2022 (USD MILLION)

TABLE 219 REST OF ASIA PACIFIC: PRIVILEGED ACCESS MANAGEMENT MARKET, BY OFFERING, 2023–2028 (USD MILLION)

TABLE 220 REST OF ASIA PACIFIC: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION, 2017–2022 (USD MILLION)

TABLE 221 REST OF ASIA PACIFIC: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION, 2023–2028 (USD MILLION)

TABLE 222 REST OF ASIA PACIFIC: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE, 2017–2022 (USD MILLION)

TABLE 223 REST OF ASIA PACIFIC: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE, 2023–2028 (USD MILLION)

TABLE 224 REST OF ASIA PACIFIC: PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2017–2022 (USD MILLION)

TABLE 225 REST OF ASIA PACIFIC: PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2023–2028 (USD MILLION)

TABLE 226 REST OF ASIA PACIFIC: PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2017–2022 (USD MILLION)



TABLE 227 REST OF ASIA PACIFIC: PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2023–2028 (USD MILLION)

9.5 MIDDLE EAST & AFRICA

9.5.1 MIDDLE EAST & AFRICA: PRIVILEGED ACCESS MANAGEMENT MARKET DRIVERS

9.5.2 MIDDLE EAST & AFRICA: RECESSION IMPACT

9.5.3 MIDDLE EAST & AFRICA: REGULATORY LANDSCAPE

TABLE 228 MIDDLE EAST & AFRICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY OFFERING, 2017–2022 (USD MILLION)

TABLE 229 MIDDLE EAST & AFRICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY OFFERING, 2023–2028 (USD MILLION)

TABLE 230 MIDDLE EAST & AFRICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION, 2017–2022 (USD MILLION)

TABLE 231 MIDDLE EAST & AFRICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION, 2023–2028 (USD MILLION)

TABLE 232 MIDDLE EAST & AFRICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE, 2017–2022 (USD MILLION)

TABLE 233 MIDDLE EAST & AFRICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE, 2023–2028 (USD MILLION)

TABLE 234 MIDDLE EAST & AFRICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2017–2022 (USD MILLION)

TABLE 235 MIDDLE EAST & AFRICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2023–2028 (USD MILLION)

TABLE 236 MIDDLE EAST & AFRICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2017–2022 (USD MILLION)

TABLE 237 MIDDLE EAST & AFRICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2023–2028 (USD MILLION)

TABLE 238 MIDDLE EAST & AFRICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 239 MIDDLE EAST & AFRICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY REGION, 2023–2028 (USD MILLION)

9.5.4 MIDDLE EAST

TABLE 240 MIDDLE EAST: PRIVILEGED ACCESS MANAGEMENT MARKET, BY OFFERING, 2017–2022 (USD MILLION)

9.5.4.1 Gulf Cooperation Council (GCC)

9.5.4.1.1 Fusion of digital transformation, increase in cyber threats, cloud adoption, and regulatory changes to fuel growth

9.5.4.2 Rest of Middle East

TABLE 241 MIDDLE EAST: PRIVILEGED ACCESS MANAGEMENT MARKET, BY

OFFERING, 2023–2028 (USD MILLION)

TABLE 242 MIDDLE EAST: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION, 2017–2022 (USD MILLION)

TABLE 243 MIDDLE EAST: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION, 2023–2028 (USD MILLION)

TABLE 244 MIDDLE EAST: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE, 2017–2022 (USD MILLION)

TABLE 245 MIDDLE EAST: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE, 2023–2028 (USD MILLION)

TABLE 246 MIDDLE EAST: PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2017–2022 (USD MILLION)

TABLE 247 MIDDLE EAST: PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2023–2028 (USD MILLION)

TABLE 248 MIDDLE EAST: PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2017–2022 (USD MILLION)

TABLE 249 MIDDLE EAST: PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2023–2028 (USD MILLION)

#### 9.5.5 AFRICA

9.5.5.1 Rise in digital transformation coupled with escalating cyber threats and awareness to propel growth

TABLE 250 AFRICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY OFFERING, 2017–2022 (USD MILLION)

TABLE 251 AFRICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY OFFERING, 2023–2028 (USD MILLION)

TABLE 252 AFRICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION, 2017–2022 (USD MILLION)

TABLE 253 AFRICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION, 2023–2028 (USD MILLION)

TABLE 254 AFRICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE, 2017–2022 (USD MILLION)

TABLE 255 AFRICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE, 2023–2028 (USD MILLION)

TABLE 256 AFRICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2017–2022 (USD MILLION)

TABLE 257 AFRICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2023–2028 (USD MILLION)

TABLE 258 AFRICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2017–2022 (USD MILLION)

TABLE 259 AFRICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY

VERTICAL, 2023–2028 (USD MILLION)

9.6 LATIN AMERICA

9.6.1 LATIN AMERICA: PRIVILEGED ACCESS MANAGEMENT MARKET DRIVERS

9.6.2 LATIN AMERICA: REGULATORY LANDSCAPE

TABLE 260 LATIN AMERICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY OFFERING, 2017–2022 (USD MILLION)

TABLE 261 LATIN AMERICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY OFFERING, 2023–2028 (USD MILLION)

TABLE 262 LATIN AMERICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION, 2017–2022 (USD MILLION)

TABLE 263 LATIN AMERICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION, 2023–2028 (USD MILLION)

TABLE 264 LATIN AMERICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE, 2017–2022 (USD MILLION)

TABLE 265 LATIN AMERICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE, 2023–2028 (USD MILLION)

TABLE 266 LATIN AMERICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2017–2022 (USD MILLION)

TABLE 267 LATIN AMERICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2023–2028 (USD MILLION)

TABLE 268 LATIN AMERICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2017–2022 (USD MILLION)

TABLE 269 LATIN AMERICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2023–2028 (USD MILLION)

TABLE 270 LATIN AMERICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY COUNTRY, 2017–2022 (USD MILLION)

TABLE 271 LATIN AMERICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY COUNTRY, 2023–2028 (USD MILLION)

9.6.3 BRAZIL

9.6.3.1 Need for advanced security solutions to deal with ransomware attacks on high-profile institutions to propel growth

TABLE 272 BRAZIL: PRIVILEGED ACCESS MANAGEMENT MARKET, BY OFFERING, 2017–2022 (USD MILLION)

TABLE 273 BRAZIL: PRIVILEGED ACCESS MANAGEMENT MARKET, BY OFFERING, 2023–2028 (USD MILLION)

TABLE 274 BRAZIL: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION, 2017–2022 (USD MILLION)

TABLE 275 BRAZIL: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION, 2023–2028 (USD MILLION)

TABLE 276 BRAZIL: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE, 2017–2022 (USD MILLION)

TABLE 277 BRAZIL: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE, 2023–2028 (USD MILLION)

TABLE 278 BRAZIL: PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2017–2022 (USD MILLION)

TABLE 279 BRAZIL: PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2023–2028 (USD MILLION)

TABLE 280 BRAZIL: PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2017–2022 (USD MILLION)

TABLE 281 BRAZIL: PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2023–2028 (USD MILLION)

#### 9.6.4 MEXICO

9.6.4.1 Surge in digitalization and increasing shift towards cloud-based solutions to spur growth

TABLE 282 MEXICO: PRIVILEGED ACCESS MANAGEMENT MARKET, BY OFFERING, 2017–2022 (USD MILLION)

TABLE 283 MEXICO: PRIVILEGED ACCESS MANAGEMENT MARKET, BY OFFERING, 2023–2028 (USD MILLION)

TABLE 284 MEXICO: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION, 2017–2022 (USD MILLION)

TABLE 285 MEXICO: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION, 2023–2028 (USD MILLION)

TABLE 286 MEXICO: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE, 2017–2022 (USD MILLION)

TABLE 287 MEXICO: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE, 2023–2028 (USD MILLION)

TABLE 288 MEXICO: PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2017–2022 (USD MILLION)

TABLE 289 MEXICO: PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2023–2028 (USD MILLION)

TABLE 290 MEXICO: PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2017–2022 (USD MILLION)

TABLE 291 MEXICO: PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2023–2028 (USD MILLION)

#### 9.6.5 REST OF LATIN AMERICA

TABLE 292 REST OF LATIN AMERICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY OFFERING, 2017–2022 (USD MILLION)

TABLE 293 REST OF LATIN AMERICA: PRIVILEGED ACCESS MANAGEMENT

MARKET, BY OFFERING, 2023–2028 (USD MILLION)

TABLE 294 REST OF LATIN AMERICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION, 2017–2022 (USD MILLION)

TABLE 295 REST OF LATIN AMERICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SOLUTION, 2023–2028 (USD MILLION)

TABLE 296 REST OF LATIN AMERICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE, 2017–2022 (USD MILLION)

TABLE 297 REST OF LATIN AMERICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY SERVICE, 2023–2028 (USD MILLION)

TABLE 298 REST OF LATIN AMERICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2017–2022 (USD MILLION)

TABLE 299 REST OF LATIN AMERICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2023–2028 (USD MILLION)

TABLE 300 REST OF LATIN AMERICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2017–2022 (USD MILLION)

TABLE 301 REST OF LATIN AMERICA: PRIVILEGED ACCESS MANAGEMENT MARKET, BY VERTICAL, 2023–2028 (USD MILLION)

## **10 COMPETITIVE LANDSCAPE**

### 10.1 OVERVIEW

#### 10.2 KEY PLAYER STRATEGIES/RIGHT TO WIN

TABLE 302 OVERVIEW OF STRATEGIES ADOPTED BY KEY PAM VENDORS

#### 10.3 REVENUE ANALYSIS

FIGURE 40 REVENUE ANALYSIS OF KEY PAM VENDORS, 2017–2022 (USD MILLION)

#### 10.4 MARKET SHARE ANALYSIS

FIGURE 41 PRIVILEGED ACCESS MANAGEMENT MARKET SHARE, 2022

TABLE 303 PRIVILEGED ACCESS MANAGEMENT MARKET: DEGREE OF COMPETITION

#### 10.5 COMPANY EVALUATION MATRIX

##### 10.5.1 STARS

##### 10.5.2 EMERGING LEADERS

##### 10.5.3 PERVASIVE PLAYERS

##### 10.5.4 PARTICIPANTS

FIGURE 42 KEY COMPANY EVALUATION MATRIX

##### 10.5.5 COMPETITIVE FOOTPRINT

TABLE 304 COMPANY FOOTPRINT OF KEY PLAYERS, BY OFFERING

TABLE 305 COMPANY FOOTPRINT OF KEY PLAYERS, BY REGION

## 10.6 STARTUP/SME EVALUATION MATRIX

### 10.6.1 PROGRESSIVE COMPANIES

### 10.6.2 RESPONSIVE COMPANIES

### 10.6.3 DYNAMIC COMPANIES

### 10.6.4 STARTING BLOCKS

## FIGURE 43 STARTUP/SME EVALUATION MATRIX

### 10.6.5 COMPETITIVE BENCHMARKING

## TABLE 306 LIST OF STARTUPS/SMES AND FUNDING

## TABLE 307 COMPANY FOOTPRINT OF STARTUPS/SMES, BY REGION

## 10.7 COMPETITIVE SCENARIO AND TRENDS

### 10.7.1 PRODUCT LAUNCHES

## TABLE 308 PRIVILEGED ACCESS MANAGEMENT MARKET: PRODUCT LAUNCHES, JANUARY 2022–OCTOBER 2023

### 10.7.2 DEALS

## TABLE 309 PRIVILEGED ACCESS MANAGEMENT MARKET: DEALS, JANUARY 2022–OCTOBER 2023

## 11 COMPANY PROFILES

(Business overview, Products/Services/Solutions offered, Recent Developments, MNM view)\*

### 11.1 KEY PLAYERS

#### 11.1.1 FORTINET

## TABLE 310 FORTINET: BUSINESS OVERVIEW

## FIGURE 44 FORTINET: COMPANY SNAPSHOT

## TABLE 311 FORTINET: PRODUCTS/SOLUTIONS/SERVICES OFFERED

## TABLE 312 FORTINET: PRODUCT LAUNCHES

#### 11.1.2 BEYONDTRUST

## TABLE 313 BEYOND TRUST: BUSINESS OVERVIEW

## TABLE 314 BEYOND TRUST: PRODUCTS/SOLUTIONS/SERVICES OFFERED

## TABLE 315 BEYONDTRUST: PRODUCT LAUNCHES

## TABLE 316 BEYONDTRUST: DEALS

#### 11.1.3 CYBERARK

## TABLE 317 CYBERARK: BUSINESS OVERVIEW

## FIGURE 45 CYBERARK: COMPANY SNAPSHOT

## TABLE 318 CYBERARK: PRODUCTS/SOLUTIONS/SERVICES OFFERED

## TABLE 319 CYBERARK: PRODUCT LAUNCHES

## TABLE 320 CYBERARK: DEALS

#### 11.1.4 BROADCOM

TABLE 321 BROADCOM: BUSINESS OVERVIEW

FIGURE 46 BROADCOM: COMPANY SNAPSHOT

TABLE 322 BROADCOM: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 323 BROADCOM: PRODUCT LAUNCHES

TABLE 324 BROADCOM: DEALS

#### 11.1.5 IMPRIVATA

TABLE 325 IMPRIVATA: BUSINESS OVERVIEW

TABLE 326 IMPRIVATA: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 327 IMPRIVATA: PRODUCT LAUNCHES

TABLE 328 IMPRIVATA: DEALS

#### 11.1.6 OPTIV SECURITY

TABLE 329 OPTIV SECURITY: BUSINESS OVERVIEW

TABLE 330 OPTIV SECURITY: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 331 OPTIV SECURITY: PRODUCT LAUNCHES

TABLE 332 OPTIV SECURITY: DEALS

#### 11.1.7 OKTA

TABLE 333 OKTA: BUSINESS OVERVIEW

FIGURE 47 OKTA: COMPANY SNAPSHOT

TABLE 334 OKTA: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 335 OKTA: PRODUCT LAUNCHES

TABLE 336 OKTA: DEALS

#### 11.1.8 IBM

TABLE 337 IBM: BUSINESS OVERVIEW

FIGURE 48 IBM: COMPANY SNAPSHOT

TABLE 338 IBM: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 339 IBM: PRODUCT LAUNCHES

TABLE 340 IBM: DEALS

#### 11.1.9 MICRO FOCUS (OPENTEXT)

TABLE 341 MICRO FOCUS (OPENTEXT): BUSINESS OVERVIEW

FIGURE 49 MICRO FOCUS (OPENTEXT): COMPANY SNAPSHOT

TABLE 342 MICRO FOCUS (OPENTEXT): PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 343 MICRO FOCUS (OPENTEXT): PRODUCT LAUNCHES

#### 11.1.10 MANAGEENGINE (ZOHO)

TABLE 344 MANAGEENGINE (ZOHO): BUSINESS OVERVIEW

TABLE 345 MANAGEENGINE (ZOHO): PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 346 MANAGEENGINE (ZOHO): PRODUCT LAUNCHES

TABLE 347 MANAGEENGINE (ZOHO): DEALS

#### 11.1.11 HASHI CORPORATION

TABLE 348 HASHI CORPORATION: BUSINESS OVERVIEW

FIGURE 50 HASHI CORPORATION: COMPANY SNAPSHOT

TABLE 349 HASHI CORPORATION PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 350 HASHI CORPORATION: PRODUCT LAUNCHES

#### 11.2 OTHER PLAYERS (SMES AND STARTUPS)

11.2.1 ONE IDENTITY

11.2.2 ARCON

11.2.3 NETWRIX

11.2.4 DELINEA

11.2.5 WALLIX

11.2.6 SAVIYNT

11.2.7 SENHASEGURA

11.2.8 KRONTECH

11.2.9 MINIORANGE

11.2.10 EMPOWERID

11.2.11 STRONGDM

11.2.12 CYBERSOLVE

11.2.13 OPAL SECURITY

11.2.14 FOXPASS

11.2.15 SECUREDEN

11.2.16 REVBITS

11.2.17 SILVERFORT

11.2.18 IDM TECHNOLOGIES

\*Details on Business overview, Products/Services/Solutions offered, Recent Developments, MNM view might not be captured in case of unlisted companies.

## 12 ADJACENT MARKETS

### 12.1 INTRODUCTION TO ADJACENT MARKETS

TABLE 351 ADJACENT MARKETS AND FORECASTS

### 12.2 LIMITATIONS

### 12.3 PRIVILEGED ACCESS MANAGEMENT MARKET ECOSYSTEM AND ADJACENT MARKETS

#### 12.3.1 IDENTITY AND ACCESS MANAGEMENT (IAM) MARKET

TABLE 352 IDENTITY AND ACCESS MANAGEMENT MARKET, BY TYPE, 2017–2022 (USD MILLION)

TABLE 353 IDENTITY AND ACCESS MANAGEMENT MARKET, BY TYPE, 2023–2028 (USD MILLION)



TABLE 354 IDENTITY AND ACCESS MANAGEMENT MARKET, BY OFFERING, 2017–2022 (USD MILLION)

TABLE 355 IDENTITY AND ACCESS MANAGEMENT MARKET, BY OFFERING, 2023–2028 (USD MILLION)

TABLE 356 IDENTITY AND ACCESS MANAGEMENT MARKET, BY SOLUTION, 2017–2022 (USD MILLION)

TABLE 357 IDENTITY AND ACCESS MANAGEMENT MARKET, BY SOLUTION, 2023–2028 (USD MILLION)

TABLE 358 IDENTITY AND ACCESS MANAGEMENT MARKET, BY SERVICE, 2017–2022 (USD MILLION)

TABLE 359 IDENTITY AND ACCESS MANAGEMENT MARKET, BY SERVICE, 2023–2028 (USD MILLION)

TABLE 360 IDENTITY AND ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2017–2022 (USD MILLION)

TABLE 361 IDENTITY AND ACCESS MANAGEMENT MARKET, BY DEPLOYMENT MODE, 2023–2028 (USD MILLION)

TABLE 362 IDENTITY AND ACCESS MANAGEMENT MARKET, BY VERTICAL, 2017–2022 (USD MILLION)

TABLE 363 IDENTITY AND ACCESS MANAGEMENT MARKET, BY VERTICAL, 2023–2028 (USD MILLION)

TABLE 364 IDENTITY AND ACCESS MANAGEMENT MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 365 IDENTITY AND ACCESS MANAGEMENT MARKET, BY REGION, 2023–2028 (USD MILLION)

#### 12.3.2 ROLE-BASED ACCESS CONTROL MARKET

TABLE 366 ROLE-BASED ACCESS CONTROL MARKET, BY OFFERING, 2018–2021 (USD MILLION)

TABLE 367 ROLE-BASED ACCESS CONTROL MARKET, BY OFFERING, 2022–2027 (USD MILLION)

TABLE 368 ROLE-BASED ACCESS CONTROL MARKET, BY ORGANIZATION SIZE, 2018–2021 (USD MILLION)

TABLE 369 ROLE-BASED ACCESS CONTROL MARKET, BY ORGANIZATION SIZE, 2022–2027 (USD MILLION)

TABLE 370 ROLE-BASED ACCESS CONTROL MARKET, BY VERTICAL, 2018–2021 (USD MILLION)

TABLE 371 ROLE-BASED ACCESS CONTROL MARKET, BY VERTICAL, 2022–2027 (USD MILLION)

TABLE 372 ROLE-BASED ACCESS CONTROL MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 373 ROLE-BASED ACCESS CONTROL MARKET, BY REGION, 2022–2027  
(USD MILLION)

**13 APPENDIX**

13.1 DISCUSSION GUIDE

13.2 KNOWLEDGESTORE: MARKETSANDMARKETS' SUBSCRIPTION PORTAL

13.3 CUSTOMIZATION OPTIONS

13.4 RELATED REPORTS

13.5 AUTHOR DETAILS

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