

Software Asset Management Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Component (Solution, Services), By Deployment Mode (On-Premise, Cloud), By Organization Size (Small & Medium Enterprises, Large Enterprises), By Industry (BFSI, Government, Healthcare, Retail & E-commerce), By Region & Competition, 2019-2029F

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Abstracts

The Global Software Asset Management Market was valued at USD 2.86 Billion in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 19.04% through 2029.

The global Software Asset Management (SAM) market is experiencing dynamic growth, driven by the increasing complexity of software environments, stringent regulatory requirements, and a pervasive need for cost optimization. SAM solutions, comprising advanced technologies and tools, have become instrumental in helping organizations manage their diverse software portfolios efficiently. Large enterprises, with intricate IT infrastructures and expansive software landscapes, dominate the market due to their significant resources and the imperative for comprehensive SAM practices. Cloud deployment is emerging as the dominant trend, offering organizations the agility, scalability, and cost-effectiveness required to navigate modern IT landscapes. Regulatory compliance, particularly concerning data privacy and licensing agreements, underscores the strategic importance of SAM solutions. The market is witnessing a transition towards AI and ML-driven SAM tools, enhancing predictive analytics, risk management, and automation capabilities. While large enterprises currently wield

influence, the SAM landscape is evolving to cater to the diverse needs of Small and Medium Enterprises (SMEs), fostering a more inclusive market. As organizations globally recognize the strategic imperative of efficient software asset management, the SAM market is poised for sustained growth, providing a technological backbone for businesses seeking operational excellence, compliance adherence, and optimal utilization of software investments.

Key Market Drivers

Rising Complexity in Software Environments

A significant driver fueling the global Software Asset Management market is the escalating complexity of modern software environments within organizations. The contemporary business landscape is characterized by an ever-expanding array of software applications, ranging from traditional desktop software to cloud-based solutions and Software as a Service (SaaS) offerings. This complexity is exacerbated by frequent updates, patches, and new releases, leading to challenges in maintaining an accurate inventory of software assets. Organizations grapple with diverse licensing models, usage conditions, and evolving technologies, necessitating robust SAM solutions. The rising complexity of software environments serves as a driving force for organizations to invest in SAM tools that provide visibility, control, and optimization capabilities, ensuring efficient management of software assets across the entire lifecycle.

Regulatory Compliance and Risk Mitigation

The imperative for regulatory compliance and risk mitigation stands as a compelling driver propelling the global Software Asset Management market. Organizations across industries are subject to stringent regulatory requirements governing software licensing and usage. Non-compliance with these regulations can result in severe financial penalties, legal consequences, and damage to reputation. SAM solutions play a pivotal role in ensuring that organizations adhere to licensing agreements, maintain accurate records, and proactively manage compliance risks. The increasing awareness of the legal and financial ramifications of non-compliance motivates organizations to adopt SAM tools that offer automated compliance checks, real-time monitoring, and comprehensive reporting. The driver of regulatory compliance and risk mitigation underscores SAM's strategic importance in safeguarding organizations from the legal and financial pitfalls associated with improper software asset management.

Cost Optimization and Efficiency Gains

Cost optimization and efficiency gains emerge as powerful drivers propelling the adoption of Software Asset Management solutions globally. Organizations, irrespective of size or industry, are continually seeking ways to streamline operations, reduce costs, and enhance overall efficiency. SAM solutions offer a strategic approach to achieving these objectives by providing insights into software usage patterns, identifying underutilized licenses, and optimizing licensing agreements. Through effective SAM practices, organizations can eliminate unnecessary expenses associated with over-licensing, negotiate favorable terms with software vendors, and maximize the value derived from their software investments. The emphasis on cost optimization and efficiency gains positions SAM as a pivotal tool for organizations striving to achieve fiscal responsibility and operational excellence in a competitive business environment.

Increasing Adoption of Cloud-based Solutions

The global shift towards cloud computing and the adoption of cloud-based solutions serve as a robust driver propelling the Software Asset Management market. Traditional SAM solutions often relied on on-premise installations, posing challenges in terms of accessibility, scalability, and maintenance. With the increasing prevalence of cloud-based applications and infrastructure, organizations are turning to SAM solutions that align with cloud environments. Cloud-based SAM solutions offer the advantage of remote accessibility, enabling users to manage software assets from any location. They also provide scalability, allowing organizations to adapt to changing software needs dynamically. The trend towards cloud adoption positions SAM as an integral component of the broader cloud management ecosystem, driving the demand for solutions that seamlessly integrate with cloud-based technologies.

Emphasis on Cybersecurity and Data Protection

An escalating emphasis on cybersecurity and data protection serves as a pivotal driver influencing the global Software Asset Management market. With the proliferation of cyber threats and the increasing sophistication of attacks, organizations are recognizing SAM as a critical element of their cybersecurity strategies. SAM solutions contribute to cybersecurity efforts by ensuring that software applications are regularly updated with the latest security patches, reducing vulnerability to exploits. Additionally, SAM aids in identifying and mitigating potential risks associated with outdated or unsupported software versions. As data breaches become more prevalent, organizations are investing in SAM tools that enhance their cybersecurity posture, safeguard sensitive

information, and contribute to a proactive and comprehensive approach to data protection.

Key Market Challenges

Complex Licensing Models and Agreements

One of the foremost challenges in the global Software Asset Management market revolves around the intricacies of software licensing models and agreements. The software industry is notorious for its diverse and complex licensing structures, often characterized by numerous versions, editions, and usage conditions. Organizations face the challenge of deciphering these intricate agreements to ensure compliance and optimize costs effectively. Complex licensing models contribute to the risk of inadvertent non-compliance, leading to potential legal and financial repercussions. The challenge intensifies as organizations deal with a mix of perpetual licenses, subscription-based models, and evolving licensing terms. The need for clarity in understanding licensing agreements has become a critical aspect of effective SAM, demanding sophisticated tools and strategies to navigate the labyrinth of licensing complexities.

Dynamic and Evolving Software Environments

The dynamic nature of software environments poses a significant challenge for organizations attempting to manage their software assets comprehensively. In the contemporary business landscape, software applications are subject to frequent updates, patches, and new releases. The proliferation of cloud-based solutions, Software as a Service (SaaS), and continuous integration practices further contribute to the complexity. Organizations must contend with a constant influx of new software versions and applications, making it challenging to maintain an accurate inventory, track usage patterns, and ensure compliance. This dynamism requires SAM solutions to adapt swiftly to changes, providing real-time insights and automation capabilities to keep pace with the evolving software landscape.

Lack of Standardization and Interoperability

A key challenge in the global SAM market stems from the lack of standardization and interoperability among SAM solutions and software vendors. The absence of universally accepted standards for SAM processes and data formats makes it challenging for organizations to seamlessly integrate SAM tools with other enterprise systems. This lack of standardization often results in manual efforts to reconcile data from different

sources, leading to inefficiencies and increased possibilities of errors. Interoperability challenges hinder the smooth exchange of information between SAM solutions and broader IT management systems, impeding the establishment of a cohesive and interconnected software management ecosystem. Addressing this challenge requires industry collaboration to establish standardized practices and promote interoperability across SAM tools and software vendors.

Inadequate Resources and Expertise

Resource constraints and a shortage of expertise in Software Asset Management represent a significant challenge for many organizations. Implementing effective SAM requires dedicated resources for activities such as software discovery, license reconciliation, compliance auditing, and ongoing optimization efforts. Small and Medium-sized Enterprises (SMEs), in particular, may face challenges in allocating dedicated personnel and financial resources for SAM initiatives. Moreover, the complexity of SAM processes often requires specialized knowledge and skills that may be lacking within organizations. The shortage of SAM expertise increases the risk of suboptimal software management practices, leading to potential compliance issues, overspending on licenses, and missed opportunities for cost savings. Overcoming this challenge involves investing in training programs, hiring skilled SAM professionals, or leveraging external expertise through SAM service providers.

Vendor Audits and Compliance Risks

Vendor audits and the associated compliance risks present a perennial challenge for organizations in the global SAM market. Software vendors routinely conduct audits to ensure that organizations are using their products in accordance with licensing agreements. These audits can be resource-intensive, disruptive, and may result in financial penalties if compliance issues are identified. The challenge lies in proactively managing and preparing for vendor audits, especially given the complexity of software licensing models. Organizations must maintain meticulous records, conduct regular internal audits, and establish robust processes to respond to vendor audit requests promptly. The fear of audits and compliance risks often compels organizations to invest in SAM solutions that offer continuous monitoring, automated compliance checks, and proactive optimization capabilities.

Key Market Trends

Cloud-based Software Asset Management Solutions

The first significant trend reshaping the global Software Asset Management market is the rapid adoption of cloud-based solutions. Traditional SAM systems often relied on on-premise installations, posing challenges in terms of accessibility, scalability, and maintenance. Cloud-based SAM solutions address these issues by offering a more flexible and agile approach. Organizations increasingly prefer cloud deployments for their SAM tools as they provide remote accessibility, allowing users to manage software assets from any location. Additionally, cloud solutions eliminate the need for extensive on-premise infrastructure, reducing upfront costs and accelerating implementation timelines. The scalability of cloud-based SAM solutions is particularly advantageous, allowing organizations to adapt to fluctuating software needs seamlessly. This trend reflects a broader industry shift towards cloud adoption, driven by the benefits of efficiency, cost-effectiveness, and improved collaboration.

Integration of Artificial Intelligence and Machine Learning

Another transformative trend in the global Software Asset Management market is the integration of Artificial Intelligence (AI) and Machine Learning (ML) technologies. These advanced technologies bring a new dimension to SAM by automating processes, enhancing data analysis, and providing predictive capabilities. AI and ML algorithms can analyze historical software usage patterns, predict future needs, and optimize licensing agreements accordingly. They also contribute to proactive risk management by identifying potential compliance issues and recommending corrective actions. The integration of AI and ML empowers organizations to make data-driven decisions, streamline SAM processes, and mitigate the risks associated with software audits. As the volume and complexity of software assets continue to grow, leveraging intelligent technologies becomes imperative for efficient and proactive management.

Focus on Cybersecurity and Compliance

With the escalating frequency and sophistication of cybersecurity threats, there is a growing trend in the global SAM market towards heightened focus on cybersecurity and compliance. SAM tools are increasingly recognized not only for their role in optimizing software costs but also as critical components of cybersecurity strategies. SAM solutions assist organizations in ensuring that software applications are regularly updated with the latest security patches, reducing vulnerability to cyber threats. Moreover, they play a pivotal role in software license compliance, helping organizations adhere to regulatory requirements and avoid legal consequences. The trend towards a more comprehensive approach to SAM, integrating cybersecurity and compliance

considerations, reflects the evolving landscape where data security and regulatory adherence are paramount concerns for businesses across industries.

Mobile Device Management and Bring Your Own Device (BYOD) Integration

The proliferation of mobile devices and the widespread adoption of Bring Your Own Device (BYOD) policies in the workplace have catalyzed a trend in the SAM market towards integrating Mobile Device Management (MDM) capabilities. SAM solutions are evolving to encompass not only traditional desktop applications but also mobile applications and devices. This trend is driven by the changing dynamics of the modern workplace, where employees use a variety of devices to access corporate software. SAM tools that seamlessly integrate with MDM solutions enable organizations to manage software assets across a diverse array of devices, ensuring compliance, security, and optimized usage. The BYOD trend is reshaping how organizations approach SAM, necessitating solutions that provide a holistic view of software assets across both traditional and mobile environments.

Subscription-based Licensing Models

The fifth prominent trend in the global Software Asset Management market revolves around the increasing prevalence of subscription-based licensing models. Traditionally, many software products were sold under perpetual licensing agreements. However, the industry is witnessing a shift towards subscription-based models, where organizations pay recurring fees for software usage. This trend aligns with the broader shift in the software industry towards Software as a Service (SaaS) and cloud-based offerings. Subscription-based licensing provides organizations with greater flexibility, allowing them to scale software usage based on their actual needs. It also facilitates easier budgeting and cost management. SAM solutions are adapting to accommodate the nuances of subscription-based models, providing organizations with tools to optimize costs, track usage accurately, and ensure compliance within the dynamic landscape of evolving licensing structures.

Segmental Insights

Component Insights

Solution segment dominates in the global software asset management market in 2023. The dominance of the Solutions segment in the global SAM market is underscored by the critical role that software solutions play in addressing the multifaceted challenges

associated with managing software assets. SAM solutions encompass a spectrum of tools and platforms designed to automate, streamline, and optimize the entire lifecycle of software assets within an organization. These solutions provide functionalities ranging from software discovery and inventory management to license compliance monitoring, usage tracking, and vendor management.

One of the primary drivers behind the dominance of SAM solutions is the escalating complexity of modern software environments. With the proliferation of diverse software applications, varying licensing models, and the advent of cloud-based solutions, organizations face unprecedented challenges in maintaining visibility and control over their software assets. SAM solutions offer a technological bulwark against this complexity, providing a centralized platform for organizations to track, monitor, and manage their software portfolios efficiently. The ability of SAM solutions to offer real-time insights, automate compliance checks, and optimize software usage aligns with the strategic imperatives of organizations seeking operational efficiency, cost savings, and regulatory adherence.

The dominance of SAM solutions is accentuated by the continuous evolution of technology. As organizations grapple with the dynamic nature of software landscapes, they increasingly rely on sophisticated solutions that incorporate advanced technologies such as Artificial Intelligence (AI) and Machine Learning (ML). These technologies empower SAM solutions to provide predictive analytics, proactive risk management, and intelligent automation, enhancing their efficacy in optimizing software assets in real-time.

SAM solutions cater to diverse organizational needs, offering scalability to adapt to the size and complexity of different enterprises. Whether for small and medium-sized businesses or large enterprises with intricate IT infrastructures, SAM solutions provide a tailored approach to software asset management. The Solutions segment's dominance is further solidified by its role in addressing the challenges posed by software audits, ensuring compliance with licensing agreements, and mitigating risks associated with non-compliance.

In essence, while Services complement the SAM ecosystem by providing expertise, consultation, and implementation support, it is the Solutions segment that takes center stage, serving as the technological backbone for organizations striving to optimize software assets in an era defined by technological complexity, regulatory scrutiny, and the pursuit of operational excellence. The dominance of SAM solutions signifies their indispensable role in shaping the future of software asset management, offering

organizations the tools needed to navigate the intricate landscape of modern IT environments and extract maximum value from their software investments.

Regional Insights

North America dominated the global software asset management market in 2023. North America, particularly the United States, is a global hub for technology innovation. The region boasts a vibrant ecosystem of tech companies, startups, and research institutions at the forefront of software development and IT advancements. This technological prowess translates into a greater awareness and early adoption of cutting-edge SAM solutions. North American organizations are more likely to leverage the latest technologies and practices, driving the demand for sophisticated SAM tools that align with the dynamic nature of their IT environments.

The stringent regulatory environment in North America, especially concerning data privacy and software licensing compliance, plays a pivotal role in driving the adoption of SAM solutions. Regulatory bodies in the region, such as the Business Software Alliance (BSA), enforce strict guidelines regarding the legal and ethical use of software. Organizations operating in North America face substantial legal and financial consequences for non-compliance. As a result, there is a heightened focus on SAM as a strategic imperative for ensuring adherence to licensing agreements, mitigating compliance risks, and avoiding legal repercussions.

North America is home to a multitude of large enterprises spanning various industries. These organizations often have expansive and complex IT infrastructures with a diverse array of software applications. Managing software assets in such intricate environments requires robust SAM solutions that offer scalability, automation, and comprehensive insights. The prevalence of large enterprises in North America contributes significantly to the demand for advanced SAM tools capable of addressing the unique challenges posed by complex software landscapes.

The culture of early technology adoption is deeply ingrained in North American businesses. Organizations in the region are proactive in seeking and implementing solutions that enhance operational efficiency, reduce costs, and ensure compliance. The early recognition of the strategic importance of SAM has led North American businesses to invest in these solutions ahead of many other regions, contributing to the region's dominance in the global SAM market.

North America benefits from a highly skilled workforce, including IT professionals with

expertise in software management, compliance, and cybersecurity. The availability of a proficient workforce accelerates the implementation and optimization of SAM solutions. Organizations in the region can leverage local talent to navigate the complexities of SAM processes effectively, from software discovery to license reconciliation.

Key Market Players

Flexera Software LLC

Certero Ltd

BMC Software Inc.

Microsoft Corporation

Samsung SDS, Inc.

Ivanti Software, Inc.

Omnitza, Inc.

SoftwareKey.com

HCL Technologies Limited

SysAid Technologies Ltd.

Report Scope:

In this report, the Global Software Asset Management Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Software Asset Management Market, By Component:

Solution

Services

Software Asset Management Market, By Deployment Mode:

On-Premise

Cloud

Software Asset Management Market, By Organization Size:

Small & Medium Enterprises

Large Enterprises

Software Asset Management Market, By Industry:

BFSI

Government

Healthcare

Retail & E-commerce

Software Asset Management Market, By Region:

North America

United States

Canada

Mexico

Europe

Germany

France

United Kingdom

Italy

Spain

South America

Brazil

Argentina

Colombia

Asia-Pacific

China

India

Japan

South Korea

Australia

Middle East & Africa

Saudi Arabia

UAE

South Africa

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Software Asset Management Market.

Available Customizations:

Global Software Asset Management Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

Contents

1. SERVICE OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Baseline Methodology
- 2.2. Key Industry Partners
- 2.3. Major Association and Secondary Sources
- 2.4. Forecasting Methodology
- 2.5. Data Triangulation & Validation
- 2.6. Assumptions and Limitations

3. EXECUTIVE SUMMARY

4. VOICE OF CUSTOMER

5. GLOBAL SOFTWARE ASSET MANAGEMENT MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Component (Solution, Services)
 - 5.2.2. By Deployment Mode (On-Premise, Cloud)
 - 5.2.3. By Organization Size (Small & Medium Enterprises, Large Enterprises)
 - 5.2.4. By Industry (BFSI, Government, Healthcare, Retail & E-commerce)
 - 5.2.5. By Region (North America, Europe, South America, Middle East & Africa, Asia Pacific)
- 5.3. By Company (2023)
- 5.4. Market Map

6. NORTH AMERICA SOFTWARE ASSET MANAGEMENT MARKET OUTLOOK

- 6.1. Market Size & Forecast
 - 6.1.1. By Value
- 6.2. Market Share & Forecast
 - 6.2.1. By Component
 - 6.2.2. By Deployment Mode
 - 6.2.3. By Organization Size
 - 6.2.4. By Industry
 - 6.2.5. By Country
- 6.3. North America: Country Analysis
 - 6.3.1. United States Software Asset Management Market Outlook
 - 6.3.1.1. Market Size & Forecast
 - 6.3.1.1.1. By Value
 - 6.3.1.2. Market Share & Forecast
 - 6.3.1.2.1. By Component
 - 6.3.1.2.2. By Deployment Mode
 - 6.3.1.2.3. By Organization Size
 - 6.3.1.2.4. By Industry
 - 6.3.2. Canada Software Asset Management Market Outlook
 - 6.3.2.1. Market Size & Forecast
 - 6.3.2.1.1. By Value
 - 6.3.2.2. Market Share & Forecast
 - 6.3.2.2.1. By Component
 - 6.3.2.2.2. By Deployment Mode
 - 6.3.2.2.3. By Organization Size
 - 6.3.2.2.4. By Industry
 - 6.3.3. Mexico Software Asset Management Market Outlook
 - 6.3.3.1. Market Size & Forecast
 - 6.3.3.1.1. By Value
 - 6.3.3.2. Market Share & Forecast
 - 6.3.3.2.1. By Component
 - 6.3.3.2.2. By Deployment Mode
 - 6.3.3.2.3. By Organization Size
 - 6.3.3.2.4. By Industry

7. EUROPE SOFTWARE ASSET MANAGEMENT MARKET OUTLOOK

- 7.1. Market Size & Forecast
 - 7.1.1. By Value
- 7.2. Market Share & Forecast

- 7.2.1. By Component
- 7.2.2. By Deployment Mode
- 7.2.3. By Organization Size
- 7.2.4. By Industry
- 7.2.5. By Country
- 7.3. Europe: Country Analysis
 - 7.3.1. Germany Software Asset Management Market Outlook
 - 7.3.1.1. Market Size & Forecast
 - 7.3.1.1.1. By Value
 - 7.3.1.2. Market Share & Forecast
 - 7.3.1.2.1. By Component
 - 7.3.1.2.2. By Deployment Mode
 - 7.3.1.2.3. By Organization Size
 - 7.3.1.2.4. By Industry
 - 7.3.2. France Software Asset Management Market Outlook
 - 7.3.2.1. Market Size & Forecast
 - 7.3.2.1.1. By Value
 - 7.3.2.2. Market Share & Forecast
 - 7.3.2.2.1. By Component
 - 7.3.2.2.2. By Deployment Mode
 - 7.3.2.2.3. By Organization Size
 - 7.3.2.2.4. By Industry
 - 7.3.3. United Kingdom Software Asset Management Market Outlook
 - 7.3.3.1. Market Size & Forecast
 - 7.3.3.1.1. By Value
 - 7.3.3.2. Market Share & Forecast
 - 7.3.3.2.1. By Component
 - 7.3.3.2.2. By Deployment Mode
 - 7.3.3.2.3. By Organization Size
 - 7.3.3.2.4. By Industry
 - 7.3.4. Italy Software Asset Management Market Outlook
 - 7.3.4.1. Market Size & Forecast
 - 7.3.4.1.1. By Value
 - 7.3.4.2. Market Share & Forecast
 - 7.3.4.2.1. By Component
 - 7.3.4.2.2. By Deployment Mode
 - 7.3.4.2.3. By Organization Size
 - 7.3.4.2.4. By Industry
 - 7.3.5. Spain Software Asset Management Market Outlook

- 7.3.5.1. Market Size & Forecast
 - 7.3.5.1.1. By Value
- 7.3.5.2. Market Share & Forecast
 - 7.3.5.2.1. By Component
 - 7.3.5.2.2. By Deployment Mode
 - 7.3.5.2.3. By Organization Size
 - 7.3.5.2.4. By Industry

8. SOUTH AMERICA SOFTWARE ASSET MANAGEMENT MARKET OUTLOOK

- 8.1. Market Size & Forecast
 - 8.1.1. By Value
- 8.2. Market Share & Forecast
 - 8.2.1. By Component
 - 8.2.2. By Deployment Mode
 - 8.2.3. By Organization Size
 - 8.2.4. By Industry
 - 8.2.5. By Country
- 8.3. South America: Country Analysis
 - 8.3.1. Brazil Software Asset Management Market Outlook
 - 8.3.1.1. Market Size & Forecast
 - 8.3.1.1.1. By Value
 - 8.3.1.2. Market Share & Forecast
 - 8.3.1.2.1. By Component
 - 8.3.1.2.2. By Deployment Mode
 - 8.3.1.2.3. By Organization Size
 - 8.3.1.2.4. By Industry
 - 8.3.2. Colombia Software Asset Management Market Outlook
 - 8.3.2.1. Market Size & Forecast
 - 8.3.2.1.1. By Value
 - 8.3.2.2. Market Share & Forecast
 - 8.3.2.2.1. By Component
 - 8.3.2.2.2. By Deployment Mode
 - 8.3.2.2.3. By Organization Size
 - 8.3.2.2.4. By Industry
 - 8.3.3. Argentina Software Asset Management Market Outlook
 - 8.3.3.1. Market Size & Forecast
 - 8.3.3.1.1. By Value
 - 8.3.3.2. Market Share & Forecast

- 8.3.3.2.1. By Component
- 8.3.3.2.2. By Deployment Mode
- 8.3.3.2.3. By Organization Size
- 8.3.3.2.4. By Industry

9. MIDDLE EAST & AFRICA SOFTWARE ASSET MANAGEMENT MARKET OUTLOOK

9.1. Market Size & Forecast

- 9.1.1. By Value

9.2. Market Share & Forecast

- 9.2.1. By Component
- 9.2.2. By Deployment Mode
- 9.2.3. By Organization Size
- 9.2.4. By Industry
- 9.2.5. By Country

9.3. Middle East & Africa: Country Analysis

9.3.1. Saudi Arabia Software Asset Management Market Outlook

- 9.3.1.1. Market Size & Forecast
 - 9.3.1.1.1. By Value
- 9.3.1.2. Market Share & Forecast
 - 9.3.1.2.1. By Component
 - 9.3.1.2.2. By Deployment Mode
 - 9.3.1.2.3. By Organization Size
 - 9.3.1.2.4. By Industry

9.3.2. UAE Software Asset Management Market Outlook

- 9.3.2.1. Market Size & Forecast
 - 9.3.2.1.1. By Value
- 9.3.2.2. Market Share & Forecast
 - 9.3.2.2.1. By Component
 - 9.3.2.2.2. By Deployment Mode
 - 9.3.2.2.3. By Organization Size
 - 9.3.2.2.4. By Industry

9.3.3. South Africa Software Asset Management Market Outlook

- 9.3.3.1. Market Size & Forecast
 - 9.3.3.1.1. By Value
- 9.3.3.2. Market Share & Forecast
 - 9.3.3.2.1. By Component
 - 9.3.3.2.2. By Deployment Mode

9.3.3.2.3. By Organization Size

9.3.3.2.4. By Industry

10. ASIA PACIFIC SOFTWARE ASSET MANAGEMENT MARKET OUTLOOK

10.1. Market Size & Forecast

10.1.1. By Value

10.2. Market Share & Forecast

10.2.1. By Component

10.2.2. By Deployment Mode

10.2.3. By Organization Size

10.2.4. By Industry

10.2.5. By Country

10.3. Asia Pacific: Country Analysis

10.3.1. China Software Asset Management Market Outlook

10.3.1.1. Market Size & Forecast

10.3.1.1.1. By Value

10.3.1.2. Market Share & Forecast

10.3.1.2.1. By Component

10.3.1.2.2. By Deployment Mode

10.3.1.2.3. By Organization Size

10.3.1.2.4. By Industry

10.3.2. India Software Asset Management Market Outlook

10.3.2.1. Market Size & Forecast

10.3.2.1.1. By Value

10.3.2.2. Market Share & Forecast

10.3.2.2.1. By Component

10.3.2.2.2. By Deployment Mode

10.3.2.2.3. By Organization Size

10.3.2.2.4. By Industry

10.3.3. Japan Software Asset Management Market Outlook

10.3.3.1. Market Size & Forecast

10.3.3.1.1. By Value

10.3.3.2. Market Share & Forecast

10.3.3.2.1. By Component

10.3.3.2.2. By Deployment Mode

10.3.3.2.3. By Organization Size

10.3.3.2.4. By Industry

10.3.4. South Korea Software Asset Management Market Outlook

- 10.3.4.1. Market Size & Forecast
 - 10.3.4.1.1. By Value
- 10.3.4.2. Market Share & Forecast
 - 10.3.4.2.1. By Component
 - 10.3.4.2.2. By Deployment Mode
 - 10.3.4.2.3. By Organization Size
 - 10.3.4.2.4. By Industry
- 10.3.5. Australia Software Asset Management Market Outlook
 - 10.3.5.1. Market Size & Forecast
 - 10.3.5.1.1. By Value
 - 10.3.5.2. Market Share & Forecast
 - 10.3.5.2.1. By Component
 - 10.3.5.2.2. By Deployment Mode
 - 10.3.5.2.3. By Organization Size
 - 10.3.5.2.4. By Industry

11. MARKET DYNAMICS

- 11.1. Drivers
- 11.2. Challenges

12. MARKET TRENDS AND DEVELOPMENTS

13. COMPANY PROFILES

- 13.1. Flexera Software LLC
 - 13.1.1. Business Overview
 - 13.1.2. Key Revenue and Financials
 - 13.1.3. Recent Developments
 - 13.1.4. Key Personnel
 - 13.1.5. Key Product/Services Offered
- 13.2. Certero Ltd
 - 13.2.1. Business Overview
 - 13.2.2. Key Revenue and Financials
 - 13.2.3. Recent Developments
 - 13.2.4. Key Personnel
 - 13.2.5. Key Product/Services Offered
- 13.3. BMC Software Inc.
 - 13.3.1. Business Overview

- 13.3.2. Key Revenue and Financials
- 13.3.3. Recent Developments
- 13.3.4. Key Personnel
- 13.3.5. Key Product/Services Offered
- 13.4. Microsoft Corporation
 - 13.4.1. Business Overview
 - 13.4.2. Key Revenue and Financials
 - 13.4.3. Recent Developments
 - 13.4.4. Key Personnel
 - 13.4.5. Key Product/Services Offered
- 13.5. Samsung SDS, Inc.
 - 13.5.1. Business Overview
 - 13.5.2. Key Revenue and Financials
 - 13.5.3. Recent Developments
 - 13.5.4. Key Personnel
 - 13.5.5. Key Product/Services Offered
- 13.6. Ivanti Software, Inc.
 - 13.6.1. Business Overview
 - 13.6.2. Key Revenue and Financials
 - 13.6.3. Recent Developments
 - 13.6.4. Key Personnel
 - 13.6.5. Key Product/Services Offered
- 13.7. Oomnitza, Inc.
 - 13.7.1. Business Overview
 - 13.7.2. Key Revenue and Financials
 - 13.7.3. Recent Developments
 - 13.7.4. Key Personnel
 - 13.7.5. Key Product/Services Offered
- 13.8. SoftwareKey.com
 - 13.8.1. Business Overview
 - 13.8.2. Key Revenue and Financials
 - 13.8.3. Recent Developments
 - 13.8.4. Key Personnel
 - 13.8.5. Key Product/Services Offered
- 13.9. HCL Technologies Limited
 - 13.9.1. Business Overview
 - 13.9.2. Key Revenue and Financials
 - 13.9.3. Recent Developments
 - 13.9.4. Key Personnel

13.9.5. Key Product/Services Offered

13.10.SysAid Technologies Ltd.

13.10.1. Business Overview

13.10.2. Key Revenue and Financials

13.10.3. Recent Developments

13.10.4. Key Personnel

13.10.5. Key Product/Services Offered

14. STRATEGIC RECOMMENDATIONS

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