

Europe Cloud Infrastructure Entitlements Management (CIEM) Market Forecast to 2031 - Regional Analysis - by Component (Solution and Services), Organization Size (Large Enterprises and SMEs), and Vertical (IT and Telecom, Healthcare, Manufacturing, BFSI, Retail and eCommerce, and Others)

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Abstracts

The Europe cloud infrastructure entitlements management (CIEM) market was valued at US\$ 307.17 million in 2023 and is expected to reach US\$ 3,955.41 million by 2031; it is estimated to register a CAGR of 37.6% from 2023 to 2031.

Stringent Government Regulations Drive Europe Cloud Infrastructure Entitlements Management (CIEM) Market

Various industry and government regulations require businesses to adhere to strict security controls. In such a scenario, cloud infrastructure entitlements management is a crucial aspect of an organization's cybersecurity strategy. In industries such as healthcare, finance, and government that handle sensitive data, organizations of all sizes must comply with complex regulations such as GDPR, HIPAA, PCI-DSS, and SOX to protect the sensitive data of consumers and businesses. Failure to comply with these regulations can lead to heavy fines and damage to the organization's reputation. For instance, the General Data Protection Regulation (GDPR), established in 2018, imposes fines ranging up to US\$ 21.68 million (EUR 20 million) or 4% of the company's global annual revenue, whichever is higher. Similarly, the Health Insurance Portability and Accountability Act (HIPAA) violations fines can range up to US\$ 1.5 million per violation. The Securities and Exchange Commission (SEC) imposes fines from tens of

thousands to millions of dollars. The Occupational Safety and Health Administration (OSHA) violations fines can range up to US\$ 134,937 per violation, whereas the Foreign Corrupt Practices Act (FCPA) violations can require a fine of a total of US\$ 25 million or more. The Environmental Protection Agency (EPA) can fine up to US\$ 50,000 per day per violation. Companies worldwide have faced huge fines due to the violation of these regulations. For instance, according to a survey of 500 organizations worldwide by Kaspersky, the average loss of a company from a violation is US\$ 551,000, of which the average loss of small and medium-sized companies from a violation is US\$ 38,000. Thus, organizations are required to implement cloud infrastructure entitlements management solutions to comply with stringent government regulations such as PCI DSS, CCPA, HIPAA, SOX, and GDPR, providing lucrative opportunities for market growth.

Europe Cloud Infrastructure Entitlements Management (CIEM) Market Overview

In terms of value, the cloud infrastructure entitlements management (CIEM) market in United Kingdom was valued at US\$ 80.86 million in 2023 and is projected to reach US\$ 1,146.97 million by 2031; it is expected to register a CAGR of 39.3% from 2023 to 2031. According to the UK government's Cloud First Policy, cloud usage is growing, both in terms of volume and the type of services being built and hosted in it. The cloud is the preferred option of the country's businesses when they procure new IT services. This factor is fueling the adoption of cloud security solutions, which drives the market growth in the UK. In addition, the rise in digitalization and adoption of digital solutions by SMEs is further fueling the market growth. The government's focus on reducing cyberattacks further complements the adoption of CIEM solutions. For example, in July 2024, At the State Opening of Parliament, the newly elected Labour government introduced the Cyber Security and Resilience Bill, which seeks to reduce the severity of cyberattacks on essential services and improve the country's preparedness for cybersecurity. The proposed regulations will be implemented in the transport, energy, drinking water, health, and digital infrastructure sectors. The legislative proposal will also affect online marketplaces, online search engines, and cloud computing services.

Europe Cloud Infrastructure Entitlements Management (CIEM) Market Revenue and Forecast to 2031 (US\$ Million)

Europe Cloud Infrastructure Entitlements Management (CIEM) Market Segmentation

The Europe cloud infrastructure entitlements management (CIEM) market is categorized into component, organization size, vertical, and country.

Based on component, the Europe cloud infrastructure entitlements management (CIEM) market is bifurcated into solution and services. The solution segment held a larger market share in 2023.

In terms of organization size, the Europe cloud infrastructure entitlements management (CIEM) market is bifurcated into large enterprises and SMEs. The large enterprises segment held a larger market share in 2023.

By vertical, the Europe cloud infrastructure entitlements management (CIEM) market is segmented into IT and telecom, healthcare, manufacturing, BFSI, retail and e-commerce, and others. The manufacturing segment held the largest market share in 2023.

By country, the Europe cloud infrastructure entitlements management (CIEM) market is segmented into the UK, Germany, France, Italy, Russia, and the Rest of Europe. The UK dominated the Europe cloud infrastructure entitlements management (CIEM) market share in 2023.

Microsoft Corp, Palo Alto Networks Inc, CrowdStrike Holdings Inc, CyberArk Software Ltd., One Identity LLC., Radware Ltd, Zscaler Inc, Tenable Holdings Inc, Check Point Software Technologies Ltd, and BeyondTrust Corporation are some of the leading companies operating in the Europe cloud infrastructure entitlements management (CIEM) market.

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