

Software Asset Management Market Size Share, Growth Analysis, by Offering (Solutions (License Management, Audit & Compliance Management, Contract Management), and Services), Deployment Mode, Vertical and Region - Global Industry Forecast to 2029

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Report description:

The software asset management market is expected to grow from USD 3.5 billion in 2024 to USD 7.3 billion by 2029, at a CAGR of 16.0% during the forecast period. The software asset management market has gradually gained traction across various sectors, including BFSI, government, manufacturing, retail, energy, and technology, by integrating comprehensive asset tracking, advanced analytics, and real-time optimization capabilities. These software asset management solutions offer end-to-end management, including license compliance, usage monitoring, cost optimization, and cybersecurity enhancement. Organizations are increasingly adopting software asset management to improve operational efficiency, meet regulatory requirements, and maximize the value of their software investments. The solutions segment primarily includes platforms for asset discovery, license management, and optimization, supported by AI, automation, and integration with existing IT systems.

"As per the organization size, SMEs are expected to hold the highest growth rate during the forecast period. "

Organizations with an employee strength of less than 1,000 are termed SMEs. These enterprises are adopting low-cost and easily scalable solutions. While having smaller IT environments, SMEs still benefit significantly from software asset management. They often have limited IT budgets and resources, making cost optimization and risk management even more critical. However, SMEs might prefer more straightforward and cost-effective software asset management solutions.

The software asset management market for SMEs is expanding rapidly, driven by the need for cost optimization, compliance with licensing agreements, and the growing complexity of IT environments due to digital transformation. SMEs, which often operate with limited IT budgets and resources, benefit significantly from software asset management by reducing unnecessary software expenses, mitigating compliance risks, and optimizing software usage. Trends such as integrating software asset management

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with IT Service Management (ITSM) systems, adopting automation and AI for more efficient asset management, and shifting to subscription-based licensing models are particularly relevant for SMEs. According to Flexera, 93% of organizations have some form of software asset management program, reflecting its critical importance. The SME market is expected to grow, with a projected CAGR of 17.1% from 2024 to 2029, underscoring its increasing relevance for SMEs seeking to streamline operations and enhance IT governance.

"As per verticals, the manufacturing segment will hold the largest market share during the forecast period. "

Several noteworthy trends drive the manufacturing and software asset management market. First comes automation and digitization. Manufacturers are increasingly using the Internet of Things, AI, and machine learning to minimize production and maintenance time. In that respect, implementing software asset management solutions aids in managing and optimizing software licenses for better compliance and cost reduction. Cloud-based software asset management is also vastly deployed, as it is easy, fast, and scalable. Furthermore, there is a growing interest in cybersecurity, as digital assets may not be jeopardized within an interlaced production environment. All these trends enhance operational efficiency, cost control, and security related to the manufacturing process.

The manufacturing segment increasingly seeks software asset management solutions to improve software utilization, ensure compliance, and minimize associated costs. As companies look to rationalize their software inventory and manage licenses efficiently, the market for software asset management in manufacturing grows. Some key vendors offering end-to-end software asset management solutions include IBM, Microsoft, ServiceNow, Flexera, Snow Software, and Ivanti. These vendors provide industrial-strength software asset management across IT environments, enabling manufacturers to improve operational efficiency and lower the risks related to software audits through features such as automated license tracking, compliance reporting, and asset lifecycle management.

"Based on region, the Asia Pacific region will grow at the highest growth rate during the forecast period."

The software asset management market in the Asia Pacific region, encompassing countries like Singapore, India, Indonesia, Taiwan, and South Korea, is experiencing substantial growth. The need for regulatory compliance, cost optimization, and digital transformation initiatives primarily drives this surge. Organizations in these areas increasingly adopt software asset management solutions to manage software assets efficiently, reduce compliance risks, and enhance IT operational effectiveness.

The rapid digitalization across various sectors and a strong focus on cybersecurity and data protection propel the demand for robust software asset management practices. Companies seek to handle the complexity of IT environments and optimize software expenditures, leading to a growing adoption of software asset management solutions. Regulatory pressures and the necessity for efficient IT asset management further boost this trend.

The software asset management market in Asia-Pacific is projected to grow at a higher rate due to the increasing adoption rate of digital technologies and the rising requirement for the proper management of IT assets. According to recent reports, it will likely rise further by a CAGR of nearly 18% over the next few years. This surge is attributed to the expanding IT infrastructure across industries, heightened awareness regarding software asset management's advantages, and stringent software compliance regulatory requirements. Some major economies like China, India, Japan, and Australia presently lead the market, considering their rapid technological advancement and massive investments in IT infrastructure.

As per findings, cybersecurity has become a significant investment priority for organizations in the Asia Pacific region. The region's security spending has steadily grown due to rising cyber threats; this heightened focus on cybersecurity underscores the importance of effective software asset management in safeguarding digital assets and ensuring compliance. Local vendors like Noventiq are pivotal in this market, offering comprehensive services such as inventory analysis, legal compliance checks, and process development to integrate software asset management into business practices.

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

-□By Company: Tier I: 25%, Tier II: 30%, and Tier III: 45%

-□By Designation: C-Level Executives: 25%, Director Level: 45%, and Others: 30%

-□By Region: North America: 32%, Europe: 22%, Asia Pacific: 28%, Rest of World: 18%

Note: Tier 1 companies have more than USD 10 billion, tier 2 companies' revenue ranges between USD 1 and 10 billion, and tier 3 companies' revenue ranges between USD 500 million and 1 billion. Other designations include sales managers, marketing managers, and product managers.

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Source: Secondary Research, Interviews with Experts, and MarketsandMarkets Analysis

Some of the significant vendors offering software asset management solutions across the globe include.

Flexera (US), Snow Software (Sweden), USU Software AG (Germany), Ivanti (US), BMC Software (US), ServiceNow (US), Certero (UK), Matrix42 (Germany), Broadcom (US), and Eracent (US)

Research coverage:

The market study covers the software asset management market across segments. It aims to estimate the market size and the growth potential of this market across different market segments, such as offering, deployment model, organization size, vertical, and region. It includes an in-depth competitive analysis of the key players in the market, their company profiles, key observations related to product and business offerings, recent developments, and key market strategies.

Reasons to buy this report:

The report will help the market leaders/new entrants with information on the closest approximations of the revenue numbers for the overall software asset management market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the 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 (multi-cloud environments pose complexities that require effective software asset management practices to optimize software investments, avoid over-licensing, and ensure compliance with licensing agreements), opportunities (organizations across the globe are prioritizing environmental responsibility to reduce their carbon footprint and promote sustainable practices, software asset management solutions can play a crucial role in this transition by optimizing software usage, thereby reducing energy consumption and electronic waste), and challenges (while these solutions offer substantial long-term benefits, such as optimized software usage, improved compliance, and enhanced security, quantifying these advantages in the short term can be challenging; this poses a considerable barrier for organizations contemplating investment in software asset management, particularly those focused on immediate financial performance).

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

□□ Market Development: Comprehensive information about lucrative markets □ the report analyses the software asset management market across varied regions.

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

□□ Competitive Assessment: In-depth assessment of market shares, growth strategies, and business processes offered in the software asset management market of leading players like Flexera (US), Snow Software (Sweden), USU Software AG (Germany), Ivanti (US), BMC Software (US), among others in the software asset management market.

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Software Asset Management Market Size Share, Growth Analysis, by Offering (Solutions (License Management, Audit & Compliance Management, Contract Management), and Services), Deployment Mode, Vertical and Region - Global Industry Forecast to 2029

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