

RegTech Market Assessment, By Component [Solutions, Services], By Deployment Mode [On-premises, Cloud], By Enterprise Size [Small and Medium Enterprises, Large Enterprises], By Application [Anti-Money Laundering and Fraud Management, Regulatory Intelligence, Risk and Compliance Management, Regulatory Reporting], By End-user [BFSI, Manufacturing, IT and Telecom, Healthcare, Government, Others], By Region, Opportunities and Forecast, 2018-2032F

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Report description:

Global regtech market is projected to witness a CAGR of 19.07% during the forecast period 2025-2032, growing from USD 16.14 billion in 2024 to USD 65.21 billion in 2032. There are several major driving forces behind the rapid growth of the RegTech market worldwide. The increasingly complex nature of regulations across regions has prompted enterprises to seek technological solutions to implement compliance management more efficiently. The surge in financial crimes, including money laundering and fraud, heightened the demand for RegTech solutions associated with anti-money laundering (AML), fraud detection, and know-your-customer (KYC). Broadly adopted cloud technologies enhance the scalability and access of RegTech solutions, while also reducing infrastructure costs. Automation and AI are additionally helping to boost productivity in RegTech by automating mundane compliance tasks and enhancing data analysis to contextualize better decision-making. Other regulatory issues, like government guidelines on real-time compliance monitoring to show risks as they arise, ignite demand. Besides these, the adoption of the emerging stringent compliance regulations like GDPR and Basel III set the stage for the adoption of advanced compliance solutions. Furthermore, the global integration of financial markets has complicated cross-border regulatory compliance, thereby driving further demand for RegTech tools. Meanwhile, venture capital investment and innovation into RegTech are quickening the development of solutions for its smooth implementation. The pandemic-induced digital

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transformation and the emergence of cryptocurrencies, therefore, usher in the demand for RegTech solutions as businesses prioritize remote operations, improved data privacy, and security protocols in an ever-evolving digital landscape.

RegTech is another way to state regulatory technology about applications of technological innovations to support enterprises in fulfilling regulatory requirements more effectively and at a lesser cost. RegTech applies tools like AI, ML, Cloud Computing, etc., to automate compliance functions, including AML, fraud detection, and regulatory reporting. The utility of RegTech solutions is gaining momentum across multiple sectors to ease the burden of some of the regulatory requirements and prevent operational risks while ensuring compliance with changing laws and regulations. In June 2024, Fortifai, a startup dedicated to speeding up and automating Environmental, Social, and Governance (ESG) regulatory compliance, secured USD 0.54 million in a funding round led by RunwayFBU, Startuplab, and Belgian VC Impact Shakers Ventures. This funding will aid in the development of Fortifai's platform, broaden its market reach, and improve ESG compliance solutions for businesses around the world.

Adoption of Emerging Technologies is Driving Market Growth

The RegTech (Regulatory Technology) market is growing expectedly due to adaptation to new technologies. Traditional compliance management cannot help financial institutions and companies while crawling mad with complicated and frequently changing regulations. Such technologies like artificial intelligence (AI), machine learning (ML), blockchain, and internet technology make it possible for RegTech solutions to automate and optimize regulatory compliance processes efficiently and more affordably. Rule-based programming will be supplemented with AI and ML abilities that analyze huge amounts of data, find patterns, and highlight suspicious activities that are essential for anti-money laundering (AML) and fraud detection efforts. The nature of cloud-based applications allows businesses to scale up or scale down their respective compliance operations at a lower cost of infrastructure added agility and flexibility.

Also, integration into RegTech is the technology behind blockchain for the inherent transparency and safety associated with it as a means of enhancing data integrity and ease of compliance reporting. Furthermore, such new technologies have an increasing added value in regulatory processes, on top of keeping organizations flexible and adjusting to speedy changes in regulations. Following its term, this would make compliance a straightforward and proactive process with minimal threat to meet business needs and proposes compliance with local and global regulatory standards. In September 2024, Upsolve, a nonprofit focused on financial education, was awarded a USD 4.2 million grant from the Bill & Melinda Gates Foundation to create an AI-driven financial counselor aimed at low-income Americans. This funding will support the development and launch of Upsolve Assist, which offers tailored advice on managing debt, improving credit, and accessing vital resources at no charge.

Rising Cybersecurity Threats are Fueling Regtech Market Growth

The growth of the RegTech market has been fueled by the increase in cyber-attacks and compliance issues. With the advancement of technology, it is no surprise that businesses face increasing difficulties when it comes to regulations, compliance, and protecting their data. Regulatory bodies are implementing stricter cybersecurity laws like GDPR and Suggestive CCPA, which increases the responsibility of companies towards data protection and reporting. The growing need for cybersecurity compliance is responsible for the increase in demand for RegTech software that simplifies and automates security details. AI, machine learning, and big data analytics help businesses identify, resolve, and report cyber risks as they happen.

Technology enables the fast detection of gaps with the ability to track systems for advanced compliance checking. Moreover, RegTech enables users to manage and automate compliance processes in one solution to eliminate human error and increase efficiency. As the threat of cyber-attacks become more frequent and advanced, the need for the ultimate RegTech solutions that boost privacy, prevent fraud, and protect information will increase in demand. In 2024, Cyberattacks using stolen or compromised credentials have increased by 71% year-over-year, while 32% of cyber incidents now involve data theft and leaks, as attackers prefer selling stolen data over encrypting it for extortion. Additionally, the AI market's growth is expected to encourage cybercriminals to develop more cost-effective tools for targeting AI technologies.

Risk and Compliance Management Segment to Dominate the RegTech Market

The RegTech industry, and in particular the risk and compliance management segment, is expected to be the market leader as companies take into account the regulatory risks and the operation of compliance Ltd. with the new more complex and multidimensional legal requirements in different sectors, organizations are faced with the risk of non-compliance and the risk of fraud, financial crimes, and inefficiencies. It is the development that has resulted largely in the increase in demand for high-end RegTech products that introduce new approaches to compliance and risk management and are implemented on a real-time basis.

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Regulatory compliance tools that focus on risk and compliance management are helping organizations move ahead by being able to automate jobs like monitoring updates on regulatory aspects, ensuring that companies follow legal frameworks, the completion of audits and the identification of potential risks are the key functions. Implementing technologies like artificial intelligence (AI), machine learning (ML), and big data analytics, RegTech solutions, can get the reactions of real-time, human errors payments have been low, and they are also giving preventive medicine to risks.

The demand for risk and compliance management has been urged by the unmatched increase in security breaches, financial crimes, and diverging regulatory standards, specifically the finance, healthcare, and energy sectors. As organizations tackle these challenges, they are increasingly adopting RegTech solutions to comply with laws such as GDPR, AML regulations, and data protection standards, all while protecting their operations. In July 2023, ACTICO GmbH, a Europe-based intelligent software company launched the Credit Risk Platform, a groundbreaking solution designed to change the way banks and commercial lenders perform risk assessments and make credit decisions. By integrating the decision automation features of the ACTICO Platform with the adaptability of Salesforce, this platform provides improved automation, smoother experience, and a high level of configurability.

North America Dominates the RegTech Market

With its immense financial infrastructure, full-bodied regulatory frameworks, and advanced tech adoption rate, North America is bound to be at the forefront of the RegTech market. Model the aim, the means, and the state of compliance of businesses to state regulatory bodies—as the law may be with the Dodd-Frank Act, the Sarbanes-Oxley Act, and the Bank Secrecy Act—against practicing firm compliance standards. As a result, such a trend has led to a surge in the demand for more RegTech applications, which help companies maneuver through the mazes of such regulations, thus achieving a higher level of compliance, and staying out of imminent risk exposure. In line with this, North America exhibits an assortment of financial institutions that along with tech firms and startups are increasingly using RegTech tools such as anti-money laundering (AML), fraud detection, and data security. Northern America's quick endorsement of the advanced technological innovations such as AI, blockchain, and cloud computing has promptly boosted the utilization of the RegTech solutions in the banking, insurance, and other industries. In December 2024, ACA Group (ACA), a provider of governance, risk, and compliance (GRC) solutions for financial services clients in the U.S., launched the next generation of ACA Vantage for ESG, its cutting-edge platform for managing ESG data and monitoring risks. This enhanced solution is tailored to collect, monitor, and report ESG data while optimizing data operations. The update seeks to tackle the increasing fragmentation in the ESG software landscape.

The Asia-Pacific is set to become a major player in the RegTech market, fueled by swift digital transformation, growing financial markets, and rising regulatory challenges. As nations in the area improve their regulatory systems, companies are increasingly adopting RegTech solutions to simplify compliance and better manage risks. The heightened emphasis on anti-money laundering (AML), cybersecurity, and data protection is also driving the demand for sophisticated regulatory technologies. With a surge in investments in technology and innovation, the RegTech sector in Asia-Pacific is poised for substantial growth.

Future Market Scenario (2025 – 2032F)

□ AI and machine learning are set to play a crucial role in RegTech solutions, enhancing the accuracy of risk detection, preventing fraud, and enabling real-time compliance monitoring.

□ As financial markets grow more interconnected, the need for RegTech solutions that simplify cross-border compliance and navigate multi-jurisdictional regulations will rise.

□ With the surge in cybersecurity threats, there will be an increasing demand for RegTech solutions that prioritize security, data privacy, and fraud prevention, particularly in industries such as finance, healthcare, and government.

□ Companies will keep looking for RegTech tools that boost operational efficiency, lower compliance costs, and speed up their responses to regulatory changes.

Key Players Landscape and Outlook

The RegTech market is undergoing significant changes, with companies prioritizing innovation and strategic moves to stay ahead. A major focus is on integrating cutting-edge technologies like artificial intelligence (AI), machine learning (ML), and blockchain, which improve compliance, risk management, and fraud detection. Firms are increasingly partnering with financial institutions, regulatory agencies, and technology providers to broaden their product lines and ensure compliance across multiple regulations. The trend towards cloud-based solutions is also gaining traction, providing businesses with the scalability, flexibility, and

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cost-effectiveness needed for seamless compliance management. Furthermore, many companies are creating tailored solutions for specific industries such as banking, insurance, and healthcare, addressing unique regulatory challenges like anti-money laundering (AML) and cybersecurity. To remain competitive, businesses are also exploring opportunities in emerging markets, where changing regulations present new possibilities. Continuous innovation is another key strategy, focusing on adapting to new regulations and emerging threats, especially in cybersecurity. By leveraging these strategies, companies aim to capture a larger market share, meet the growing demand for effective compliance solutions, and maintain their edge in the fast-evolving RegTech landscape.

In December 2024, CUBE Content Governance Global Limited, a RegTech services company based in London, announced that it has acquired Thomson Reuters Regulatory Intelligence and Oden products. This acquisition represents a major step forward for CUBE, allowing it to expand its global customer base to around 1,000 clients in sectors such as banking, insurance, asset management, payments, and other regulated industries. As a result, CUBE's workforce will increase to 600 employees, which will include 250 experts in regulatory affairs, legal, and compliance.

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