

## **License Management - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

Market Report | 2025-04-28 | 124 pages | Mordor Intelligence

### **AVAILABLE LICENSES:**

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

### **Report description:**

The License Management Market size is estimated at USD 1.43 billion in 2025, and is expected to reach USD 2.44 billion by 2030, at a CAGR of 11.22% during the forecast period (2025-2030).

Key drivers fueling market growth include heightened investments in IT infrastructure and rapid digitalization adoption across businesses. Furthermore, advancements in cloud technology, coupled with surging demand for tools that manage single licenses, promise to optimize software investments. These tools aim to cut costs, boost software usage across the company, and ensure compliance with the developer's licensing terms.

- The market is registering significant growth, led by several factors, including the rising adoption of digital tools and platforms, the growing need to meet compliance across industry verticals efficiently, and the rising need to maximize software expenditures.

- Furthermore, businesses are recalibrating their technological investments. This realignment includes actions like optimizing software investments, streamlining technology platforms, conducting comprehensive software vendor contract reviews, and pinpointing the most beneficial software licensing models. In this context, license management solutions and services are crucial, offering vital insights and recommendations to ease the transition.

- Organizations, both large and small, are increasingly prioritizing the management of IT services and applications for both immediate and future strategic decisions. As a result, enterprises heavily invest in upgrading their IT infrastructure, moving away from legacy systems based on enhanced features and capabilities.

- In a landscape where new technologies emerge almost daily, it's crucial for organizations to stay informed about their software

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

usage. While managing software licenses has always posed challenges, the complexities have intensified in today's tech-driven environment. Therefore, organizations must prioritize cost savings by eliminating duplicate licenses, avoiding over-licensing, and ensuring balanced spending. Such developments are further driving the demand for license management solutions.

- Regulatory uncertainty is a significant constraint on the market's growth studied. The absence of uniform global standards and shifting regional regulations pose challenges for companies striving to deploy effective license management solutions in diverse markets.
- Post-pandemic, businesses across industries increased focus on digital transformation, resulting in substantial adoption of digital platforms and tools. As enterprises embark on digital transformation journeys, they increasingly expand and diversify their software portfolios. With this growing digital footprint, the need for robust license management solutions intensifies, steering organizations toward more efficient and cost-effective operations.

## License Management Market Trends

### Software Component Segment is Expected to Hold Significant Market Share

- The software component segment is expected to record significant growth, driven by the rising need for companies to manage their software assets efficiently. This segment centers on solutions that assist businesses in adhering to licensing agreements, controlling costs, optimizing software utilization, and steering clear of penalties for license violations. The growing trend towards cloud services, subscription-based licensing, and the escalating complexity of software usage have further fueled the demand for software-centric license management solutions.
- Across diverse industries, organizations are increasingly automating operations and embracing advanced software tools. For example, a 2023 survey by The Innovation Group, a business services company, revealed that nearly 50% of managers reported that their companies were in the midst of a digital transformation. In addition, about 27% stated that they had already completed the transformation. Notably, only 5% of companies indicated that they neither started nor planned to pursue digital transformation.
- As automation becomes more prevalent, the demand for software licenses surges, complicating their management. Automated license management tools empower businesses to efficiently track software assets efficiently, ensuring optimal utilization. With enterprises broadening their software portfolios, manual license management becomes a challenge. Embracing automation streamlines software usage optimizes costs, and curbs wastage.
- Frequent license audits by software vendors have heightened scrutiny on companies. This push for compliance, to sidestep penalties from improper software use, has spurred demand for robust license management systems. Enterprises are actively pursuing solutions that guarantee audit readiness, helping them dodge unforeseen financial penalties.
- As the costs of non-compliance escalate and audits grow more frequent, the value of software that streamlines these processes becomes evident, alleviating both financial risks and operational burdens.
- Cloud computing has revolutionized software licensing. For example, Flexera Software reports that in 2024, 80% of enterprises are turning to Microsoft Azure for their public cloud needs. Hyperscalers, such as AWS, Microsoft Azure, and Google Cloud, are leading the charge in global cloud computing.

### Asia Pacific Expected to Witness Significant Growth

- Implementing software license optimization best practices saves enterprises around 25% of their software spend by drastically reducing the license under-use, over-use-license non-compliance, or shelfware, resulting in costly vendor penalties. At the same

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

time, enterprise software vendors and intelligent device manufacturers are leaving money on the table by failing to implement flexible licensing. APAC enterprises and application producers increasingly understand the major competitive advantages that application usage management can deliver.

- The Chinese government implements comprehensive control measures for technologies restricted or prohibited from export, following the relevant statutes of the Foreign Trade Law of the People's Republic of China and the Regulations on Administration of Technology Import and Export of the People's Republic of China. It employs licensing management for commercial enterprises engaged in technology trade with foreign parties by formulating corresponding controlled technology catalogs and control measures.
- In India, the 2023-24 Economic Survey underscored the need for easing licensing, inspection, and compliance requirements for micro, small and medium enterprises (MSMEs). Urban development management and regulatory compliance reforms can significantly improve the business environment and unleash economic growth.
- In Singapore, in July 2024, the Monetary Authority of Singapore (MAS) published updates to its Guidelines on Licensing for Payment Service Providers [PS-G01] (the Guidelines), which took effect in August 2024. The revisions to the Guidelines are intended to improve clarity, streamline application reviews, and enhance the licensing process for payment service providers under the Payment Services Act 2019 of Singapore (the PS Act). This is expected to increase the market demand in the BFSI sector.
- Many global companies are gradually investing in Asia-Pacific as an R&D hub. For instance, US-based Flexera Software continued expansion in APAC, providing room to grow as it continues its multi-year expansion plan in the APAC region. Flexera's presence in the APAC cloud will allow organizations with vendor relationships in ANZ (Australia and New Zealand) and APAC to take full advantage of all the Flexera offers while satisfying specific governance and sovereignty requirements.
- Furthermore, as per Flexera Software, most unlicensed software, with a stunning economic worth of USD 16.4 billion, is based in Asia-Pacific. As per various studies, the Asian-Pacific region (especially countries such as India, Vietnam, Indonesia, and China) is at the top in unlicensed software use. The commercial value of unlicensed software has been rising continuously.

## License Management Industry Overview

The license management market comprises many local and international players like USU Software AG, DXC Technology Co., Flexera Software LLC, Oracle Corporation, Thales Group, and ServiceNow Inc., which offer license management software and services. Companies are forming partnerships with others to develop and launch advanced solutions in the market. As such, considerable investments are being recorded in the market, increasing competition.

Companies are developing advanced technologies to gain a competitive edge, remain competitive in the market, and retain their clients, thereby intensifying the rivalry in the market. Continuous innovation in software offerings and functionalities creates a differentiating advantage for the vendors and increases competitive rivalry.

Overall, the intensity of the competitive rivalry is high in the market studied and is expected to be the same over the forecasted period.

### Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

### Table of Contents:

#### 1 INTRODUCTION

##### 1.1 Study Assumptions and Market Definition

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

## 1.2 Scope of the Study

## 2 RESEARCH METHODOLOGY

## 3 EXECUTIVE SUMMARY

## 4 MARKET INSIGHTS

### 4.1 Market Overview

### 4.2 Industry Attractiveness - Porter's Five Forces Analysis

#### 4.2.1 Bargaining Power of Suppliers

#### 4.2.2 Bargaining Power of Buyers

#### 4.2.3 Threat of New Entrants

#### 4.2.4 Threat of Substitutes

#### 4.2.5 Intensity of Competitive Rivalry

### 4.3 Assessment of the Impact of COVID-19 on the Market

## 5 MARKET DYNAMICS

### 5.1 Market Drivers

#### 5.1.1 Increasing Demand to Optimize Software Investments

#### 5.1.2 Growing Requirement for Audit-readiness among Organizations

### 5.2 Market Restraints

#### 5.2.1 Uncertain Regulatory Standards and Frameworks

### 5.3 Market Opportunities

## 6 MARKET SEGMENTATION

### 6.1 By Component

#### 6.1.1 Software

#### 6.1.2 Services

### 6.2 By Deployment

#### 6.2.1 On-premise

#### 6.2.2 Cloud

### 6.3 By Application (Qualitative Trend Analysis)

#### 6.3.1 Audit Services

#### 6.3.2 Advisory Services

#### 6.3.3 Compliance Management

#### 6.3.4 License Entitlement and Optimization

#### 6.3.5 Operations and Analytics

#### 6.3.6 Other Applications

### 6.4 By End User

#### 6.4.1 BFSI

#### 6.4.2 Healthcare and Life Sciences

#### 6.4.3 IT and Telecommunication

#### 6.4.4 Media and Entertainment

#### 6.4.5 Other End Users

### 6.5 By Geography\*\*\*

#### 6.5.1 North America

#### 6.5.2 Europe

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 6.5.3 Asia
- 6.5.4 Australia and New Zealand
- 6.5.5 Latin America
- 6.5.6 Middle East and Africa

## 7 COMPETITIVE LANDSCAPE

### 7.1 Company Profiles\*

#### 7.1.1 USU Software AG

#### 7.1.2 OpenLM Ltd

#### 7.1.3 DXC Technology Co.

#### 7.1.4 Flexera Software LLC

#### 7.1.5 Reprise Software Inc.

#### 7.1.6 License Dashboard

#### 7.1.7 Oracle Corporation

#### 7.1.8 Quest Software Inc.

#### 7.1.9 Thales Group

#### 7.1.10 ServiceNow Inc.

## 8 INVESTMENT ANALYSIS

## 9 FUTURE OF THE MARKET

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

**License Management - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

Market Report | 2025-04-28 | 124 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

**ORDER FORM:**

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-03-05"/>
		Signature	

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

