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Global AI Agent Governance Platform Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global AI Agent Governance Platform market size is expected to reach $ 1959 million by 2032, rising at a market growth of 29.4% CAGR during the forecast period (2026-2032).

Envernance Platform refers to enterprise software designed to discover, register, classify, authorize, monitor, evaluate, control, and audit AI agents deployed across an organization. The governed environment may cover internally developed agents, third-party agents, agents embedded in enterprise applications, and agents operating across public cloud, private cloud, SaaS, and on-premises infrastructure. The platform establishes governance relationships among each agent, its accountable owner, business purpose, underlying models, prompts, memory, data sources, tools, machine identities, credentials, workflows, and executable actions. Core functions generally include agent inventory and registration, ownership assignment, risk classification, policy management, identity and least-privilege access control, deployment approval, human-in-the-loop review, runtime action enforcement, tool-call control, continuous evaluation, anomaly detection, security monitoring, cost and business-value measurement, audit trails, and compliance evidence generation. This market focuses on commercial software that forms an enterprise governance control plane capable of managing AI agents from multiple development frameworks and deployment ecosystems throughout their design, deployment, operation, incident review, and retirement stages.

Key Findings

North America is the largest regional market and the principal center for product

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development and commercial adoption

Integrated control-tower and lifecycle governance platforms form the largest functional segment

Financial services, healthcare, government, and critical infrastructure lead enterprise adoption

Market Trends

AI Agent Governance Platform products are evolving from static inventories and compliance documentation toward active enterprise control planes that can enforce policies during agent operation. Product development is increasingly focused on agent identity, delegated authorization, tool-call permissions, machine-readable policies, human approval thresholds, emergency suspension, and complete action-level audit trails. Governance platforms are also expanding from the management of agents built within a single ecosystem to the discovery and control of agents developed on third-party clouds, enterprise applications, open-source frameworks, and internal development environments. Current product releases show that leading platforms are integrating governed agent catalogs, continuous agent evaluation, identity management, runtime monitoring, security controls, and business-value measurement into a unified operating layer. IBM has expanded governance capabilities around governed agent and tool catalogs, onboarding workflows, risk identification, and production monitoring, while ServiceNow has extended its AI Control Tower across external enterprise systems and Microsoft has commercialized an administrative control plane for managing agent access, lifecycle, data governance, and runtime protection.

Market Dynamics

Drivers

The primary market driver is the rapid transition of enterprise AI agents from experimental assistants to operational software entities capable of accessing sensitive information, invoking tools, communicating with other agents, and executing business actions. As the number of enterprise agents increases, organizations face growing difficulty identifying which agents are active, who owns them, what permissions they hold, and whether their behavior remains aligned with internal policies. The increasing

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use of third-party agents and agents embedded in SaaS applications further reduces the effectiveness of manual governance processes. Regulatory implementation, internal audit requirements, cybersecurity policies, and management accountability are consequently increasing demand for automated inventories, risk classification, access controls, continuous evaluation, and verifiable audit evidence. The approaching application of major EU AI Act provisions in August 2026 is also encouraging enterprises to formalize transparency, governance, monitoring, and documentation processes for deployed AI systems. ket expansion is constrained by immature product definitions, overlapping software categories, and the difficulty of separating AI agent governance budgets from broader AI platforms, cybersecurity, identity management, data governance, and compliance expenditure. Enterprises frequently operate agents across multiple clouds and application environments, but governance interfaces, agent metadata, identity standards, and policy formats remain inconsistent. Effective runtime control can also require deep integration with agent frameworks, gateways, tools, APIs, data platforms, and enterprise identity infrastructure, increasing deployment complexity and implementation cost. Some customers continue to rely on native controls included in cloud or business software platforms rather than purchasing an independent governance layer. In addition, overly restrictive policies may reduce agent performance or delay automation benefits, requiring buyers to balance control, latency, operational efficiency, and user experience. These factors may lengthen enterprise procurement cycles and limit adoption among smaller organizations.

Opportunities

The strongest opportunities lie in cross-platform agent discovery, machine identity governance, policy-as-code, runtime action control, MCP and tool governance, and automated compliance evidence. Enterprises increasingly require a vendor-neutral layer capable of managing agents regardless of where they were built or deployed, creating opportunities for independent platforms that integrate with multiple cloud, SaaS, identity, data, and security environments. Verticalized governance packages for financial services, healthcare, government, telecommunications, and critical infrastructure can provide additional value through predefined risk taxonomies, approval workflows, regulatory mappings, testing templates, and audit reports. Private-cloud, customer-VPC, and air-gapped deployments represent an important opportunity in regulated and sovereignty-sensitive markets. Further opportunities will emerge from the convergence of governance with AI security, non-human identity management, agent observability, business-value measurement, and automated incident response.

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Challenges

The industry faces long-term challenges related to standardization, interoperability, pricing models, buyer ownership, and measurable return on investment. AI agents can differ substantially in autonomy, memory, tool access, interaction patterns, and business impact, making it difficult to apply a single governance framework across all use cases. Responsibility for procurement is often divided among AI engineering, cybersecurity, identity management, data governance, legal, compliance, model-risk, and business operations teams, which can slow decision-making and create fragmented budgets. Vendors must also demonstrate that governance controls can operate in real time without creating excessive latency or blocking legitimate automation. Competitive pressure will intensify as cloud platforms, enterprise application vendors, security companies, identity providers, and specialist governance firms introduce overlapping capabilities. Independent suppliers therefore face the dual challenge of maintaining cross-platform neutrality while developing sufficient integration depth and enterprise distribution.

Value Chain Analysis

The upstream layer of the AI Agent Governance Platform value chain consists of cloud infrastructure, foundation models, agent development frameworks, observability technologies, identity and access systems, security engines, data platforms, policy libraries, regulatory taxonomies, and integration interfaces. These technologies provide the execution environments, metadata, telemetry, identity context, policy inputs, and control points required for governance. Open standards and interfaces for agent communication, tool connectivity, machine identity, event tracing, and policy enforcement are becoming increasingly important because governance platforms must obtain consistent information from heterogeneous agent ecosystems.

The midstream layer comprises integrated governance platforms, enterprise AI control towers, specialist policy and assurance platforms, agent security providers, and agent identity governance vendors. Value is created by converting fragmented technical signals into an enterprise system of record that links agents with owners, business purposes, risks, permissions, policies, performance, incidents, costs, and audit evidence. Software development, security research, regulatory mapping, platform integration, and enterprise sales constitute the principal cost components, while subscription contracts, asset-based pricing, enterprise licenses, usage-based modules, and premium implementation support are the main monetization models. Downstream

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value is realized when enterprises reduce unidentified agent exposure, shorten approval processes, enforce consistent access and action policies, improve incident response, and demonstrate accountability to management, customers, auditors, and regulators.

Segment Insights

By primary governance function, integrated full-stack governance and portfolio lifecycle management currently form the largest commercial segment because large enterprises generally prefer a central control layer that provides inventory, ownership, risk classification, workflow, monitoring, and audit capabilities within one operating environment. This segment benefits from existing enterprise AI governance, GRC, data governance, workflow, and model-risk customer bases. Runtime action governance and identity and access governance are expected to gain share as more agents obtain credentials, communicate with external tools, and execute operational tasks. Evaluation and assurance platforms remain an important supporting segment, particularly during pre-deployment testing and continuous production validation, although standalone evaluation tools generally capture a smaller portion of total governance expenditure.

By deployment model, public-cloud SaaS remains the most accessible commercial format, but hybrid, customer-VPC, private-cloud, and on-premises deployments account for a significant share of high-value enterprise opportunities. Regulated industries often require data residency, local logging, private connectivity, and greater control over sensitive agent telemetry. By governed asset scope, platforms capable of managing agents, models, AI applications, tools, and data relationships within a unified inventory are gaining strategic relevance because buyers increasingly want to avoid operating separate governance systems for each AI technology generation.

Downstream Market Opportunities

Financial services represents one of the most commercially attractive downstream markets because AI agents may participate in customer service, credit processes, compliance reviews, investment research, fraud investigation, and internal operations, all of which require clear accountability and traceable decision processes. Healthcare and life sciences provide opportunities around patient information, clinical workflows, research data, regulated documentation, and quality management. Government, defense, energy, telecommunications, and other critical infrastructure sectors create demand for private deployment, strong identity control, action approval, and detailed auditing. Retail, manufacturing, and professional services are likely to generate broader

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volume as agents expand across customer engagement, procurement, supply-chain operations, software development, finance, and employee productivity. The largest commercial opportunities will arise where agents interact directly with sensitive data or systems capable of producing material financial, operational, regulatory, or reputational consequences.

Regional Insights

North America is the largest regional market and the principal center of global supplier activity, supported by a dense concentration of enterprise software companies, cloud platforms, AI governance specialists, security vendors, identity providers, and venture-funded agent technology firms. Regional demand is driven by rapid enterprise agent deployment, mature cybersecurity and compliance budgets, and widespread use of multi-cloud and SaaS infrastructure. The United States also has the broadest supplier structure, ranging from integrated enterprise control platforms to specialized evaluation, runtime policy, identity, and security products. This diversity supports faster product iteration but also creates significant functional overlap and consolidation potential.

Europe represents the second major commercial and product-development center, with stronger emphasis on accountability, regulatory mapping, risk documentation, model-risk management, privacy, and audit evidence. The implementation timetable of the EU AI Act is reinforcing demand for formal governance processes and operational transparency. eloped a concentrated cluster of agent security and runtime-control suppliers, while China is emerging through cloud-native multi-agent governance, localized security platforms, private deployment, and compliance-oriented enterprise solutions. Japan, South Korea, India, Southeast Asia, and other regions currently rely more heavily on global cloud platforms, large IT service providers, and internally developed governance frameworks, although localized software opportunities are expected to increase as enterprise agent deployment expands.

Competitive Landscape Analysis

The global competitive landscape remains fragmented, with no single supplier controlling the full AI Agent Governance Platform stack across all deployment environments and governance functions. Large enterprise software vendors compete through installed customer bases, workflow integration, cloud infrastructure, identity ecosystems, and access to business applications. Their strategic objective is to make

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agent governance an embedded control layer within existing enterprise platforms. Independent governance specialists compete through vendor neutrality, deeper policy engineering, regulatory mapping, model-risk expertise, automated evidence generation, and faster support for emerging agent frameworks. Security and identity suppliers are entering from runtime protection, machine identity, delegated access, data-loss prevention, and tool-call control, while observability and evaluation vendors are expanding toward deployment approval, continuous assurance, and policy enforcement. The validated core list of 27 suppliers is therefore narrower than the approximately 48-company global longlist, as many extended vendors currently address only one component of the governance process. Future competition is expected to shift from basic agent discovery toward real-time policy enforcement, cross-platform identity, tool and action control, measurable business value, and interoperable audit records. Product partnerships and acquisitions are likely to accelerate as larger platforms seek specialist security, evaluation, identity, and observability capabilities, while independent vendors will need to preserve cross-platform neutrality and develop deeper vertical-industry solutions.

Report Scope

This report studies the global AI Agent Governance Platform demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for AI Agent Governance Platform, and provides market size (US$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of AI Agent Governance Platform that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global AI Agent Governance Platform total market, 2021-2032, (USD Million)

Global AI Agent Governance Platform total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: AI Agent Governance Platform total market, key domestic companies, and share, (USD Million)

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Global AI Agent Governance Platform revenue by player, revenue and market share 2021-2026, (USD Million)

Global AI Agent Governance Platform total market by Type, CAGR, 2021-2032, (USD Million)

Global AI Agent Governance Platform total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global AI Agent Governance Platform market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include IBM, ServiceNow, OneTrust, Collibra, Credo AI, ModelOp, DataRobot, SAS, Fiddler AI, Holistic AI, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world AI Agent Governance Platform market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), by player, by regions, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global AI Agent Governance Platform Market, By Region:

United States

China

Europe

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Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global AI Agent Governance Platform Market, Segmentation by Type:

Portfolio and Lifecycle Governance

Runtime Action Governance

Identity and Access Governance

Others

Global AI Agent Governance Platform Market, Segmentation by Lifecycle Stage:

Design and Pre-deployment

Deployment and Authorization

Runtime Operations

Others

Global AI Agent Governance Platform Market, Segmentation by

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Deployment Model:

Cloud-based

On-premise

Global AI Agent Governance Platform Market, Segmentation by Application:

Financial Services and Insurance

Healthcare and Life Sciences

Government and Defense

Others

Companies Profiled:

IBM

ServiceNow

OneTrust

Collibra

Credo AI

ModelOp

DataRobot

SAS

Fiddler AI

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Holistic AI

Arthur AI

Salesforce

Palo Alto Networks

ValidMind

Zenity

Microsoft

Okta

Noma Security

Alphabet

Enkrypt AI

Saidot

SAP

Dataiku

Lasso Security

Alibaba Cloud

Guangzhou Zhangdong TurboMobile Technology Co., Ltd.

Beijing Anpro Information Technology Co.,Ltd.

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Key Questions Answered

1. How big is the global AI Agent Governance Platform market?
2. What is the demand of the global AI Agent Governance Platform market?
3. What is the year over year growth of the global AI Agent Governance Platform market?
4. What is the total value of the global AI Agent Governance Platform market?
5. Who are the Major Players in the global AI Agent Governance Platform market?
6. What are the growth factors driving the market demand?

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Contents

1 SUPPLY SUMMARY

1.1 AI Agent Governance Platform Introduction
1.2 World AI Agent Governance Platform Market Size & Forecast (2021 & 2025 & 2032)
1.3 World AI Agent Governance Platform Total Market by Region (by Headquarter Location)
  1.3.1 World AI Agent Governance Platform Market Size by Region (2021-2032), (by Headquarter Location)
  1.3.2 United States Based Company AI Agent Governance Platform Revenue (2021-2032)
  1.3.3 China Based Company AI Agent Governance Platform Revenue (2021-2032)
  1.3.4 Europe Based Company AI Agent Governance Platform Revenue (2021-2032)
  1.3.5 Japan Based Company AI Agent Governance Platform Revenue (2021-2032)
  1.3.6 South Korea Based Company AI Agent Governance Platform Revenue (2021-2032)
  1.3.7 ASEAN Based Company AI Agent Governance Platform Revenue (2021-2032)
  1.3.8 India Based Company AI Agent Governance Platform Revenue (2021-2032)
1.4 Market Drivers, Restraints and Trends
  1.4.1 AI Agent Governance Platform Market Drivers
  1.4.2 Factors Affecting Demand
  1.4.3 Major Market Trends

2 DEMAND SUMMARY

2.1 World AI Agent Governance Platform Consumption Value (2021-2032)
2.2 World AI Agent Governance Platform Consumption Value by Region
  2.2.1 World AI Agent Governance Platform Consumption Value by Region (2021-2026)
  2.2.2 World AI Agent Governance Platform Consumption Value Forecast by Region (2027-2032)
2.3 United States AI Agent Governance Platform Consumption Value (2021-2032)
2.4 China AI Agent Governance Platform Consumption Value (2021-2032)
2.5 Europe AI Agent Governance Platform Consumption Value (2021-2032)
2.6 Japan AI Agent Governance Platform Consumption Value (2021-2032)
2.7 South Korea AI Agent Governance Platform Consumption Value (2021-2032)
2.8 ASEAN AI Agent Governance Platform Consumption Value (2021-2032)
2.9 India AI Agent Governance Platform Consumption Value (2021-2032)

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info@marketpublishers.com

3 WORLD AI AGENT GOVERNANCE PLATFORM COMPANIES COMPETITIVE ANALYSIS

3.1 World AI Agent Governance Platform Revenue by Player (2021-2026)
3.2 Industry Rank and Concentration Rate (CR)
  3.2.1 Global AI Agent Governance Platform Industry Rank of Major Players
  3.2.2 Global Concentration Ratios (CR4) for AI Agent Governance Platform in 2025
  3.2.3 Global Concentration Ratios (CR8) for AI Agent Governance Platform in 2025
3.3 AI Agent Governance Platform Company Evaluation Quadrant
3.4 AI Agent Governance Platform Market: Overall Company Footprint Analysis
  3.4.1 AI Agent Governance Platform Market: Region Footprint
  3.4.2 AI Agent Governance Platform Market: Company Product Type Footprint
  3.4.3 AI Agent Governance Platform Market: Company Product Application Footprint
3.5 Competitive Environment
  3.5.1 Historical Structure of the Industry
  3.5.2 Barriers of Market Entry
  3.5.3 Factors of Competition
3.6 Mergers & Acquisitions Activity

4 UNITED STATES VS CHINA VS REST OF WORLD (BY HEADQUARTER LOCATION)

4.1 United States VS China: AI Agent Governance Platform Revenue Comparison (by Headquarter Location)
  4.1.1 United States VS China: AI Agent Governance Platform Revenue Comparison (2021 & 2025 & 2032) (by Headquarter Location)
  4.1.2 United States VS China: AI Agent Governance Platform Revenue Market Share Comparison (2021 & 2025 & 2032)
4.2 United States Based Companies VS China Based Companies: AI Agent Governance Platform Consumption Value Comparison
  4.2.1 United States VS China: AI Agent Governance Platform Consumption Value Comparison (2021 & 2025 & 2032)
  4.2.2 United States VS China: AI Agent Governance Platform Consumption Value Market Share Comparison (2021 & 2025 & 2032)
4.3 United States Based AI Agent Governance Platform Companies and Market Share, 2021-2026
  4.3.1 United States Based AI Agent Governance Platform Companies, Headquarters (States, Country)

+357 96 030922
info@marketpublishers.com

4.3.2 United States Based Companies AI Agent Governance Platform Revenue, (2021-2026)
4.4 China Based Companies AI Agent Governance Platform Revenue and Market Share, 2021-2026
4.4.1 China Based AI Agent Governance Platform Companies, Company Headquarters (Province, Country)
4.4.2 China Based Companies AI Agent Governance Platform Revenue, (2021-2026)
4.5 Rest of World Based AI Agent Governance Platform Companies and Market Share, 2021-2026
4.5.1 Rest of World Based AI Agent Governance Platform Companies, Headquarters (Province, Country)
4.5.2 Rest of World Based Companies AI Agent Governance Platform Revenue (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World AI Agent Governance Platform Market Size Overview by Type: 2021 VS 2025 VS 2032
5.2 Segment Introduction by Type
5.2.1 Portfolio and Lifecycle Governance
5.2.2 Runtime Action Governance
5.2.3 Identity and Access Governance
5.2.4 Others
5.3 Market Segment by Type
5.3.1 World AI Agent Governance Platform Market Size by Type (2021-2026)
5.3.2 World AI Agent Governance Platform Market Size by Type (2027-2032)
5.3.3 World AI Agent Governance Platform Market Size Market Share by Type (2027-2032)

6 MARKET ANALYSIS BY LIFECYCLE STAGE

6.1 World AI Agent Governance Platform Market Size Overview by Lifecycle Stage: 2021 VS 2025 VS 2032
6.2 Segment Introduction by Lifecycle Stage
6.2.1 Design and Pre-deployment
6.2.2 Deployment and Authorization
6.2.3 Runtime Operations
6.2.4 Others
6.3 Market Segment by Lifecycle Stage

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6.3.1 World AI Agent Governance Platform Market Size by Lifecycle Stage (2021-2026)
6.3.2 World AI Agent Governance Platform Market Size by Lifecycle Stage (2027-2032)
6.3.3 World AI Agent Governance Platform Market Size Market Share by Lifecycle Stage (2027-2032)

7 MARKET ANALYSIS BY DEPLOYMENT MODEL

7.1 World AI Agent Governance Platform Market Size Overview by Deployment Model: 2021 VS 2025 VS 2032
7.2 Segment Introduction by Deployment Model
7.2.1 Cloud-based
7.2.2 On-premise
7.3 Market Segment by Deployment Model
7.3.1 World AI Agent Governance Platform Market Size by Deployment Model (2021-2026)
7.3.2 World AI Agent Governance Platform Market Size by Deployment Model (2027-2032)
7.3.3 World AI Agent Governance Platform Market Size Market Share by Deployment Model (2027-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World AI Agent Governance Platform Market Size Overview by Application: 2021 VS 2025 VS 2032
8.2 Segment Introduction by Application
8.2.1 Financial Services and Insurance
8.2.2 Healthcare and Life Sciences
8.2.3 Government and Defense
8.2.4 Others
8.3 Market Segment by Application
8.3.1 World AI Agent Governance Platform Market Size by Application (2021-2026)
8.3.2 World AI Agent Governance Platform Market Size by Application (2027-2032)
8.3.3 World AI Agent Governance Platform Market Size Market Share by Application (2021-2032)

9 COMPANY PROFILES

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9.1 IBM
9.1.1 IBM Details
9.1.2 IBM Major Business
9.1.3 IBM AI Agent Governance Platform Product and Services
9.1.4 IBM AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026)
9.1.5 IBM Recent Developments/Updates
9.1.6 IBM Competitive Strengths & Weaknesses
9.2 ServiceNow
9.2.1 ServiceNow Details
9.2.2 ServiceNow Major Business
9.2.3 ServiceNow AI Agent Governance Platform Product and Services
9.2.4 ServiceNow AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026)
9.2.5 ServiceNow Recent Developments/Updates
9.2.6 ServiceNow Competitive Strengths & Weaknesses
9.3 OneTrust
9.3.1 OneTrust Details
9.3.2 OneTrust Major Business
9.3.3 OneTrust AI Agent Governance Platform Product and Services
9.3.4 OneTrust AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026)
9.3.5 OneTrust Recent Developments/Updates
9.3.6 OneTrust Competitive Strengths & Weaknesses
9.4 Collibra
9.4.1 Collibra Details
9.4.2 Collibra Major Business
9.4.3 Collibra AI Agent Governance Platform Product and Services
9.4.4 Collibra AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026)
9.4.5 Collibra Recent Developments/Updates
9.4.6 Collibra Competitive Strengths & Weaknesses
9.5 Credo AI
9.5.1 Credo AI Details
9.5.2 Credo AI Major Business
9.5.3 Credo AI AI Agent Governance Platform Product and Services
9.5.4 Credo AI AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026)
9.5.5 Credo AI Recent Developments/Updates

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9.5.6 Credo AI Competitive Strengths & Weaknesses
9.6 ModelOp
9.6.1 ModelOp Details
9.6.2 ModelOp Major Business
9.6.3 ModelOp AI Agent Governance Platform Product and Services
9.6.4 ModelOp AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026)
9.6.5 ModelOp Recent Developments/Updates
9.6.6 ModelOp Competitive Strengths & Weaknesses
9.7 DataRobot
9.7.1 DataRobot Details
9.7.2 DataRobot Major Business
9.7.3 DataRobot AI Agent Governance Platform Product and Services
9.7.4 DataRobot AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026)
9.7.5 DataRobot Recent Developments/Updates
9.7.6 DataRobot Competitive Strengths & Weaknesses
9.8 SAS
9.8.1 SAS Details
9.8.2 SAS Major Business
9.8.3 SAS AI Agent Governance Platform Product and Services
9.8.4 SAS AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026)
9.8.5 SAS Recent Developments/Updates
9.8.6 SAS Competitive Strengths & Weaknesses
9.9 Fiddler AI
9.9.1 Fiddler AI Details
9.9.2 Fiddler AI Major Business
9.9.3 Fiddler AI AI Agent Governance Platform Product and Services
9.9.4 Fiddler AI AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026)
9.9.5 Fiddler AI Recent Developments/Updates
9.9.6 Fiddler AI Competitive Strengths & Weaknesses
9.10 Holistic AI
9.10.1 Holistic AI Details
9.10.2 Holistic AI Major Business
9.10.3 Holistic AI AI Agent Governance Platform Product and Services
9.10.4 Holistic AI AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026)

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info@marketpublishers.com

9.10.5 Holistic AI Recent Developments/Updates
9.10.6 Holistic AI Competitive Strengths & Weaknesses
9.11 Arthur AI
9.11.1 Arthur AI Details
9.11.2 Arthur AI Major Business
9.11.3 Arthur AI AI Agent Governance Platform Product and Services
9.11.4 Arthur AI AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026)
9.11.5 Arthur AI Recent Developments/Updates
9.11.6 Arthur AI Competitive Strengths & Weaknesses
9.12 Salesforce
9.12.1 Salesforce Details
9.12.2 Salesforce Major Business
9.12.3 Salesforce AI Agent Governance Platform Product and Services
9.12.4 Salesforce AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026)
9.12.5 Salesforce Recent Developments/Updates
9.12.6 Salesforce Competitive Strengths & Weaknesses
9.13 Palo Alto Networks
9.13.1 Palo Alto Networks Details
9.13.2 Palo Alto Networks Major Business
9.13.3 Palo Alto Networks AI Agent Governance Platform Product and Services
9.13.4 Palo Alto Networks AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026)
9.13.5 Palo Alto Networks Recent Developments/Updates
9.13.6 Palo Alto Networks Competitive Strengths & Weaknesses
9.14 ValidMind
9.14.1 ValidMind Details
9.14.2 ValidMind Major Business
9.14.3 ValidMind AI Agent Governance Platform Product and Services
9.14.4 ValidMind AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026)
9.14.5 ValidMind Recent Developments/Updates
9.14.6 ValidMind Competitive Strengths & Weaknesses
9.15 Zenity
9.15.1 Zenity Details
9.15.2 Zenity Major Business
9.15.3 Zenity AI Agent Governance Platform Product and Services
9.15.4 Zenity AI Agent Governance Platform Revenue, Gross Margin and Market

+357 96 030922
info@marketpublishers.com

Share (2021-2026)
9.15.5 Zenity Recent Developments/Updates
9.15.6 Zenity Competitive Strengths & Weaknesses
9.16 Microsoft
9.16.1 Microsoft Details
9.16.2 Microsoft Major Business
9.16.3 Microsoft AI Agent Governance Platform Product and Services
9.16.4 Microsoft AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026)
9.16.5 Microsoft Recent Developments/Updates
9.16.6 Microsoft Competitive Strengths & Weaknesses
9.17 Okta
9.17.1 Okta Details
9.17.2 Okta Major Business
9.17.3 Okta AI Agent Governance Platform Product and Services
9.17.4 Okta AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026)
9.17.5 Okta Recent Developments/Updates
9.17.6 Okta Competitive Strengths & Weaknesses
9.18 Noma Security
9.18.1 Noma Security Details
9.18.2 Noma Security Major Business
9.18.3 Noma Security AI Agent Governance Platform Product and Services
9.18.4 Noma Security AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026)
9.18.5 Noma Security Recent Developments/Updates
9.18.6 Noma Security Competitive Strengths & Weaknesses
9.19 Alphabet
9.19.1 Alphabet Details
9.19.2 Alphabet Major Business
9.19.3 Alphabet AI Agent Governance Platform Product and Services
9.19.4 Alphabet AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026)
9.19.5 Alphabet Recent Developments/Updates
9.19.6 Alphabet Competitive Strengths & Weaknesses
9.20 Enkrypt AI
9.20.1 Enkrypt AI Details
9.20.2 Enkrypt AI Major Business
9.20.3 Enkrypt AI AI Agent Governance Platform Product and Services

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info@marketpublishers.com

9.20.4 Enkrypt AI AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026)
9.20.5 Enkrypt AI Recent Developments/Updates
9.20.6 Enkrypt AI Competitive Strengths & Weaknesses
9.21 Saidot
9.21.1 Saidot Details
9.21.2 Saidot Major Business
9.21.3 Saidot AI Agent Governance Platform Product and Services
9.21.4 Saidot AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026)
9.21.5 Saidot Recent Developments/Updates
9.21.6 Saidot Competitive Strengths & Weaknesses
9.22 SAP
9.22.1 SAP Details
9.22.2 SAP Major Business
9.22.3 SAP AI Agent Governance Platform Product and Services
9.22.4 SAP AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026)
9.22.5 SAP Recent Developments/Updates
9.22.6 SAP Competitive Strengths & Weaknesses
9.23 Dataiku
9.23.1 Dataiku Details
9.23.2 Dataiku Major Business
9.23.3 Dataiku AI Agent Governance Platform Product and Services
9.23.4 Dataiku AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026)
9.23.5 Dataiku Recent Developments/Updates
9.23.6 Dataiku Competitive Strengths & Weaknesses
9.24 Lasso Security
9.24.1 Lasso Security Details
9.24.2 Lasso Security Major Business
9.24.3 Lasso Security AI Agent Governance Platform Product and Services
9.24.4 Lasso Security AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026)
9.24.5 Lasso Security Recent Developments/Updates
9.24.6 Lasso Security Competitive Strengths & Weaknesses
9.25 Alibaba Cloud
9.25.1 Alibaba Cloud Details
9.25.2 Alibaba Cloud Major Business

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9.25.3 Alibaba Cloud AI Agent Governance Platform Product and Services
9.25.4 Alibaba Cloud AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026)
9.25.5 Alibaba Cloud Recent Developments/Updates
9.25.6 Alibaba Cloud Competitive Strengths & Weaknesses
9.26 Guangzhou Zhangdong TurboMobile Technology Co., Ltd.
9.26.1 Guangzhou Zhangdong TurboMobile Technology Co., Ltd. Details
9.26.2 Guangzhou Zhangdong TurboMobile Technology Co., Ltd. Major Business
9.26.3 Guangzhou Zhangdong TurboMobile Technology Co., Ltd. AI Agent Governance Platform Product and Services
9.26.4 Guangzhou Zhangdong TurboMobile Technology Co., Ltd. AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026)
9.26.5 Guangzhou Zhangdong TurboMobile Technology Co., Ltd. Recent Developments/Updates
9.26.6 Guangzhou Zhangdong TurboMobile Technology Co., Ltd. Competitive Strengths & Weaknesses
9.27 Beijing Anpro Information Technology Co.,Ltd.
9.27.1 Beijing Anpro Information Technology Co.,Ltd. Details
9.27.2 Beijing Anpro Information Technology Co.,Ltd. Major Business
9.27.3 Beijing Anpro Information Technology Co.,Ltd. AI Agent Governance Platform Product and Services
9.27.4 Beijing Anpro Information Technology Co.,Ltd. AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026)
9.27.5 Beijing Anpro Information Technology Co.,Ltd. Recent Developments/Updates
9.27.6 Beijing Anpro Information Technology Co.,Ltd. Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 AI Agent Governance Platform Industry Chain
10.2 AI Agent Governance Platform Upstream Analysis
10.3 AI Agent Governance Platform Midstream Analysis
10.4 AI Agent Governance Platform Downstream Analysis

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology

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12.2 Research Process and Data Source
12.3 Disclaimer

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List Of Tables

LIST OF TABLES

Table 1. World AI Agent Governance Platform Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)
Table 2. World AI Agent Governance Platform Revenue by Region (2021-2026) & (USD Million), (by Headquarter Location)
Table 3. World AI Agent Governance Platform Revenue by Region (2027-2032) & (USD Million), (by Headquarter Location)
Table 4. World AI Agent Governance Platform Revenue Market Share by Region (2021-2026), (by Headquarter Location)
Table 5. World AI Agent Governance Platform Revenue Market Share by Region (2027-2032), (by Headquarter Location)
Table 6. Major Market Trends
Table 7. World AI Agent Governance Platform Consumption Value Growth Rate Forecast by Region (2021 & 2025 & 2032) & (USD Million)
Table 8. World AI Agent Governance Platform Consumption Value by Region (2021-2026) & (USD Million)
Table 9. World AI Agent Governance Platform Consumption Value Forecast by Region (2027-2032) & (USD Million)
Table 10. World AI Agent Governance Platform Revenue by Player (2021-2026) & (USD Million)
Table 11. Revenue Market Share of Key AI Agent Governance Platform Players in 2025
Table 12. World AI Agent Governance Platform Industry Rank of Major Player, Based on Revenue in 2025
Table 13. Global AI Agent Governance Platform Company Evaluation Quadrant
Table 14. Head Office of Key AI Agent Governance Platform Players
Table 15. AI Agent Governance Platform Market: Company Product Type Footprint
Table 16. AI Agent Governance Platform Market: Company Product Application Footprint
Table 17. AI Agent Governance Platform Mergers & Acquisitions Activity
Table 18. United States VS China AI Agent Governance Platform Revenue Comparison, (2021 & 2025 & 2032) & (USD Million)
Table 19. United States VS China AI Agent Governance Platform Consumption Value Comparison, (2021 & 2025 & 2032) & (USD Million)
Table 20. United States Based AI Agent Governance Platform Companies, Headquarters (States, Country)
Table 21. United States Based Companies AI Agent Governance Platform Revenue,

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(2021-2026) & (USD Million)
Table 22. United States Based Companies AI Agent Governance Platform Revenue Market Share (2021-2026)
Table 23. China Based AI Agent Governance Platform Companies, Headquarters (Province, Country)
Table 24. China Based Companies AI Agent Governance Platform Revenue, (2021-2026) & (USD Million)
Table 25. China Based Companies AI Agent Governance Platform Revenue Market Share (2021-2026)
Table 26. Rest of World Based AI Agent Governance Platform Companies, Headquarters (Province, Country)
Table 27. Rest of World Based Companies AI Agent Governance Platform Revenue (2021-2026) & (USD Million)
Table 28. Rest of World Based Companies AI Agent Governance Platform Revenue Market Share (2021-2026)
Table 29. World AI Agent Governance Platform Market Size by Type, (USD Million), 2021 & 2025 & 2032
Table 30. World AI Agent Governance Platform Market Size Value by Type (2021-2026) & (USD Million)
Table 31. World AI Agent Governance Platform Market Size by Type (2027-2032) & (USD Million)
Table 32. World AI Agent Governance Platform Market Size by Lifecycle Stage, (USD Million), 2021 & 2025 & 2032
Table 33. World AI Agent Governance Platform Market Size Value by Lifecycle Stage (2021-2026) & (USD Million)
Table 34. World AI Agent Governance Platform Market Size by Lifecycle Stage (2027-2032) & (USD Million)
Table 35. World AI Agent Governance Platform Market Size by Deployment Model, (USD Million), 2021 & 2025 & 2032
Table 36. World AI Agent Governance Platform Market Size Value by Deployment Model (2021-2026) & (USD Million)
Table 37. World AI Agent Governance Platform Market Size by Deployment Model (2027-2032) & (USD Million)
Table 38. World AI Agent Governance Platform Market Size by Application, (USD Million), 2021 & 2025 & 2032
Table 39. World AI Agent Governance Platform Market Size by Application (2021-2026) & (USD Million)
Table 40. World AI Agent Governance Platform Market Size by Application (2027-2032) & (USD Million)

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Table 41. IBM Basic Information, Manufacturing Base and Competitors
Table 42. IBM Major Business
Table 43. IBM AI Agent Governance Platform Product and Services
Table 44. IBM AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 45. IBM Recent Developments/Updates
Table 46. IBM Competitive Strengths & Weaknesses
Table 47. ServiceNow Basic Information, Manufacturing Base and Competitors
Table 48. ServiceNow Major Business
Table 49. ServiceNow AI Agent Governance Platform Product and Services
Table 50. ServiceNow AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 51. ServiceNow Recent Developments/Updates
Table 52. ServiceNow Competitive Strengths & Weaknesses
Table 53. OneTrust Basic Information, Manufacturing Base and Competitors
Table 54. OneTrust Major Business
Table 55. OneTrust AI Agent Governance Platform Product and Services
Table 56. OneTrust AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 57. OneTrust Recent Developments/Updates
Table 58. OneTrust Competitive Strengths & Weaknesses
Table 59. Collibra Basic Information, Manufacturing Base and Competitors
Table 60. Collibra Major Business
Table 61. Collibra AI Agent Governance Platform Product and Services
Table 62. Collibra AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 63. Collibra Recent Developments/Updates
Table 64. Collibra Competitive Strengths & Weaknesses
Table 65. Credo AI Basic Information, Manufacturing Base and Competitors
Table 66. Credo AI Major Business
Table 67. Credo AI AI Agent Governance Platform Product and Services
Table 68. Credo AI AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 69. Credo AI Recent Developments/Updates
Table 70. Credo AI Competitive Strengths & Weaknesses
Table 71. ModelOp Basic Information, Manufacturing Base and Competitors
Table 72. ModelOp Major Business
Table 73. ModelOp AI Agent Governance Platform Product and Services
Table 74. ModelOp AI Agent Governance Platform Revenue, Gross Margin and Market

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Share (2021-2026) & (USD Million)
Table 75. ModelOp Recent Developments/Updates
Table 76. ModelOp Competitive Strengths & Weaknesses
Table 77. DataRobot Basic Information, Manufacturing Base and Competitors
Table 78. DataRobot Major Business
Table 79. DataRobot AI Agent Governance Platform Product and Services
Table 80. DataRobot AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 81. DataRobot Recent Developments/Updates
Table 82. DataRobot Competitive Strengths & Weaknesses
Table 83. SAS Basic Information, Manufacturing Base and Competitors
Table 84. SAS Major Business
Table 85. SAS AI Agent Governance Platform Product and Services
Table 86. SAS AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 87. SAS Recent Developments/Updates
Table 88. SAS Competitive Strengths & Weaknesses
Table 89. Fiddler AI Basic Information, Manufacturing Base and Competitors
Table 90. Fiddler AI Major Business
Table 91. Fiddler AI AI Agent Governance Platform Product and Services
Table 92. Fiddler AI AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 93. Fiddler AI Recent Developments/Updates
Table 94. Fiddler AI Competitive Strengths & Weaknesses
Table 95. Holistic AI Basic Information, Manufacturing Base and Competitors
Table 96. Holistic AI Major Business
Table 97. Holistic AI AI Agent Governance Platform Product and Services
Table 98. Holistic AI AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 99. Holistic AI Recent Developments/Updates
Table 100. Holistic AI Competitive Strengths & Weaknesses
Table 101. Arthur AI Basic Information, Manufacturing Base and Competitors
Table 102. Arthur AI Major Business
Table 103. Arthur AI AI Agent Governance Platform Product and Services
Table 104. Arthur AI AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 105. Arthur AI Recent Developments/Updates
Table 106. Arthur AI Competitive Strengths & Weaknesses
Table 107. Salesforce Basic Information, Manufacturing Base and Competitors

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Table 108. Salesforce Major Business
Table 109. Salesforce AI Agent Governance Platform Product and Services
Table 110. Salesforce AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 111. Salesforce Recent Developments/Updates
Table 112. Salesforce Competitive Strengths & Weaknesses
Table 113. Palo Alto Networks Basic Information, Manufacturing Base and Competitors
Table 114. Palo Alto Networks Major Business
Table 115. Palo Alto Networks AI Agent Governance Platform Product and Services
Table 116. Palo Alto Networks AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 117. Palo Alto Networks Recent Developments/Updates
Table 118. Palo Alto Networks Competitive Strengths & Weaknesses
Table 119. ValidMind Basic Information, Manufacturing Base and Competitors
Table 120. ValidMind Major Business
Table 121. ValidMind AI Agent Governance Platform Product and Services
Table 122. ValidMind AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 123. ValidMind Recent Developments/Updates
Table 124. ValidMind Competitive Strengths & Weaknesses
Table 125. Zenity Basic Information, Manufacturing Base and Competitors
Table 126. Zenity Major Business
Table 127. Zenity AI Agent Governance Platform Product and Services
Table 128. Zenity AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 129. Zenity Recent Developments/Updates
Table 130. Zenity Competitive Strengths & Weaknesses
Table 131. Microsoft Basic Information, Manufacturing Base and Competitors
Table 132. Microsoft Major Business
Table 133. Microsoft AI Agent Governance Platform Product and Services
Table 134. Microsoft AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 135. Microsoft Recent Developments/Updates
Table 136. Microsoft Competitive Strengths & Weaknesses
Table 137. Okta Basic Information, Manufacturing Base and Competitors
Table 138. Okta Major Business
Table 139. Okta AI Agent Governance Platform Product and Services
Table 140. Okta AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

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Table 141. Okta Recent Developments/Updates
Table 142. Okta Competitive Strengths & Weaknesses
Table 143. Noma Security Basic Information, Manufacturing Base and Competitors
Table 144. Noma Security Major Business
Table 145. Noma Security AI Agent Governance Platform Product and Services
Table 146. Noma Security AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 147. Noma Security Recent Developments/Updates
Table 148. Noma Security Competitive Strengths & Weaknesses
Table 149. Alphabet Basic Information, Manufacturing Base and Competitors
Table 150. Alphabet Major Business
Table 151. Alphabet AI Agent Governance Platform Product and Services
Table 152. Alphabet AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 153. Alphabet Recent Developments/Updates
Table 154. Alphabet Competitive Strengths & Weaknesses
Table 155. Enkrypt AI Basic Information, Manufacturing Base and Competitors
Table 156. Enkrypt AI Major Business
Table 157. Enkrypt AI AI Agent Governance Platform Product and Services
Table 158. Enkrypt AI AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 159. Enkrypt AI Recent Developments/Updates
Table 160. Enkrypt AI Competitive Strengths & Weaknesses
Table 161. Saidot Basic Information, Manufacturing Base and Competitors
Table 162. Saidot Major Business
Table 163. Saidot AI Agent Governance Platform Product and Services
Table 164. Saidot AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 165. Saidot Recent Developments/Updates
Table 166. Saidot Competitive Strengths & Weaknesses
Table 167. SAP Basic Information, Manufacturing Base and Competitors
Table 168. SAP Major Business
Table 169. SAP AI Agent Governance Platform Product and Services
Table 170. SAP AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 171. SAP Recent Developments/Updates
Table 172. SAP Competitive Strengths & Weaknesses
Table 173. Dataiku Basic Information, Manufacturing Base and Competitors
Table 174. Dataiku Major Business

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Table 175. Dataiku AI Agent Governance Platform Product and Services
Table 176. Dataiku AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 177. Dataiku Recent Developments/Updates
Table 178. Dataiku Competitive Strengths & Weaknesses
Table 179. Lasso Security Basic Information, Manufacturing Base and Competitors
Table 180. Lasso Security Major Business
Table 181. Lasso Security AI Agent Governance Platform Product and Services
Table 182. Lasso Security AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 183. Lasso Security Recent Developments/Updates
Table 184. Lasso Security Competitive Strengths & Weaknesses
Table 185. Alibaba Cloud Basic Information, Manufacturing Base and Competitors
Table 186. Alibaba Cloud Major Business
Table 187. Alibaba Cloud AI Agent Governance Platform Product and Services
Table 188. Alibaba Cloud AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 189. Alibaba Cloud Recent Developments/Updates
Table 190. Alibaba Cloud Competitive Strengths & Weaknesses
Table 191. Guangzhou Zhangdong TurboMobile Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 192. Guangzhou Zhangdong TurboMobile Technology Co., Ltd. Major Business
Table 193. Guangzhou Zhangdong TurboMobile Technology Co., Ltd. AI Agent Governance Platform Product and Services
Table 194. Guangzhou Zhangdong TurboMobile Technology Co., Ltd. AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 195. Guangzhou Zhangdong TurboMobile Technology Co., Ltd. Recent Developments/Updates
Table 196. Guangzhou Zhangdong TurboMobile Technology Co., Ltd. Competitive Strengths & Weaknesses
Table 197. Beijing Anpro Information Technology Co.,Ltd. Basic Information, Manufacturing Base and Competitors
Table 198. Beijing Anpro Information Technology Co.,Ltd. Major Business
Table 199. Beijing Anpro Information Technology Co.,Ltd. AI Agent Governance Platform Product and Services
Table 200. Beijing Anpro Information Technology Co.,Ltd. AI Agent Governance Platform Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 201. Beijing Anpro Information Technology Co.,Ltd. Recent

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Developments/Updates
Table 202. Beijing Anpro Information Technology Co.,Ltd. Competitive Strengths & Weaknesses
Table 203. Global Key Players of AI Agent Governance Platform Upstream (Raw Materials)
Table 204. Global AI Agent Governance Platform Typical Customers

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List Of Figures

LIST OF FIGURES

Figure 1. AI Agent Governance Platform Picture
Figure 2. World AI Agent Governance Platform Total Revenue: 2021 & 2025 & 2032, (USD Million)
Figure 3. World AI Agent Governance Platform Total Revenue (2021-2032) & (USD Million)
Figure 4. World AI Agent Governance Platform Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)
Figure 5. World AI Agent Governance Platform Revenue Market Share by Region (2021-2032), (by Headquarter Location)
Figure 6. United States Based Company AI Agent Governance Platform Revenue (2021-2032) & (USD Million)
Figure 7. China Based Company AI Agent Governance Platform Revenue (2021-2032) & (USD Million)
Figure 8. Europe Based Company AI Agent Governance Platform Revenue (2021-2032) & (USD Million)
Figure 9. Japan Based Company AI Agent Governance Platform Revenue (2021-2032) & (USD Million)
Figure 10. South Korea Based Company AI Agent Governance Platform Revenue (2021-2032) & (USD Million)
Figure 11. ASEAN Based Company AI Agent Governance Platform Revenue (2021-2032) & (USD Million)
Figure 12. India Based Company AI Agent Governance Platform Revenue (2021-2032) & (USD Million)
Figure 13. AI Agent Governance Platform Market Drivers
Figure 14. Factors Affecting Demand
Figure 15. World AI Agent Governance Platform Consumption Value (2021-2032) & (USD Million)
Figure 16. World AI Agent Governance Platform Consumption Value Market Share by Region (2021-2032)
Figure 17. United States AI Agent Governance Platform Consumption Value (2021-2032) & (USD Million)
Figure 18. China AI Agent Governance Platform Consumption Value (2021-2032) & (USD Million)
Figure 19. Europe AI Agent Governance Platform Consumption Value (2021-2032) & (USD Million)

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Figure 20. Japan AI Agent Governance Platform Consumption Value (2021-2032) & (USD Million)
Figure 21. South Korea AI Agent Governance Platform Consumption Value (2021-2032) & (USD Million)
Figure 22. ASEAN AI Agent Governance Platform Consumption Value (2021-2032) & (USD Million)
Figure 23. India AI Agent Governance Platform Consumption Value (2021-2032) & (USD Million)
Figure 24. Producer Shipments of AI Agent Governance Platform by Player Revenue ($MM) and Market Share (%): 2025
Figure 25. Global Four-firm Concentration Ratios (CR4) for AI Agent Governance Platform Markets in 2025
Figure 26. Global Four-firm Concentration Ratios (CR8) for AI Agent Governance Platform Markets in 2025
Figure 27. United States VS China: AI Agent Governance Platform Revenue Market Share Comparison (2021 & 2025 & 2032)
Figure 28. United States VS China: AI Agent Governance Platform Consumption Value Market Share Comparison (2021 & 2025 & 2032)
Figure 29. World AI Agent Governance Platform Market Size by Type, (USD Million), 2021 & 2025 & 2032
Figure 30. World AI Agent Governance Platform Market Size Market Share by Type in 2025
Figure 31. Portfolio and Lifecycle Governance
Figure 32. Runtime Action Governance
Figure 33. Identity and Access Governance
Figure 34. Others
Figure 35. World AI Agent Governance Platform Market Size Market Share by Type (2021-2032)
Figure 36. World AI Agent Governance Platform Market Size by Lifecycle Stage, (USD Million), 2021 & 2025 & 2032
Figure 37. World AI Agent Governance Platform Market Size Market Share by Lifecycle Stage in 2025
Figure 38. Design and Pre-deployment
Figure 39. Deployment and Authorization
Figure 40. Runtime Operations
Figure 41. Others
Figure 42. World AI Agent Governance Platform Market Size Market Share by Lifecycle Stage (2021-2032)
Figure 43. World AI Agent Governance Platform Market Size by Deployment Model,

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(USD Million), 2021 & 2025 & 2032
Figure 44. World AI Agent Governance Platform Market Size Market Share by Deployment Model in 2025
Figure 45. Cloud-based
Figure 46. On-premise
Figure 47. World AI Agent Governance Platform Market Size Market Share by Deployment Model (2021-2032)
Figure 48. World AI Agent Governance Platform Market Size by Application, (USD Million), 2021 & 2025 & 2032
Figure 49. World AI Agent Governance Platform Market Size Market Share by Application in 2025
Figure 50. Financial Services and Insurance
Figure 51. Healthcare and Life Sciences
Figure 52. Government and Defense
Figure 53. Others
Figure 54. World AI Agent Governance Platform Market Size Market Share by Application (2021-2032)
Figure 55. AI Agent Governance Platform Industrial Chain
Figure 56. Methodology
Figure 57. Research Process and Data Source

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