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Global CTEM Strategy and Operations Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global CTEM Strategy and Operations market size is expected to reach $ 3097 million by 2032, rising at a market growth of 13.3% CAGR during the forecast period (2026-2032).

CTEM Strategy and Operations is a cybersecurity governance and operations service model designed to help organizations establish a security operations system centered on the attack surface and actual exploitable risks by continuously identifying, assessing, verifying, and mitigating security exposure risks in enterprise IT, cloud, applications, identities, and third-party environments. This concept originates from the Continuous Threat Exposure Management (CTEM) framework and emphasizes a shift from traditional 'vulnerability scanning and single-point remediation' to a continuous, risk-driven, and attack-path-oriented security management approach.

Gross Margin Level

CTEM strategy and operations services are essentially a composite cybersecurity service sector characterized by 'high manpower density + high platform dependence + high recurring revenue.' For project-based services primarily focused on consulting and assessment, ASM (Advanced Security Management) streamlining, process design, BAS (Business Automation System) verification, and remediation, the gross margin is typically influenced by delivery manpower and expert costs, and is closer to 28%–38%. However, for service providers who have platformized ASM, Exposure Management, Threat Validation, and automated remediation capabilities, coupled with long-term managed contracts, the gross margin can typically reach 40%–55%. Overall, the industry average gross margin for CTEM strategy and operations can be roughly understood as being in the range of 38%–48%. Leading integrated service providers

improve profits through large-scale delivery and customer stickiness, while platform vendors achieve higher structural gross margins through software and data capabilities, but overall, it is still significantly higher than traditional low-value-added security operations outsourcing.

Industry Drivers

The rapid growth of CTEM strategy and operations services is not simply driven by an increasing number of vulnerabilities, but rather by a shift in enterprise security operations models from point-based scanning and alert accumulation to a continuous exposure governance and business risk closed-loop system. First, the continuous expansion of cloud, multi-cloud, SaaS, IoT, remote work, and third-party connectivity has led to a rapid spillover of the attack surface, making it difficult for traditional vulnerability management to cover the entire picture. Second, increasingly stringent compliance requirements and board-level risk accountability necessitate more quantifiable and sustainable exposure governance mechanisms. Third, attack methods increasingly emphasize attack paths, identity abuse, and genuine exploitability, driving enterprises to shift from 'discovering vulnerabilities' to 'verifying exposures, prioritizing risks, and driving remediation.' Fourth, market research generally indicates that services are the fastest-growing segment, suggesting that enterprises are increasingly inclined to treat CTEM as a long-term operational capability rather than a one-off project. Overall, CTEM strategy and operations are evolving from 'ancillary consulting for security tools' to a new core layer within the enterprise's continuous security operations system.

This report studies the global CTEM Strategy and Operations demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for CTEM Strategy and Operations, 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 CTEM Strategy and Operations that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global CTEM Strategy and Operations total market, 2021-2032, (USD Million)

Global CTEM Strategy and Operations total market by region & country, CAGR, 2021-2032, (USD Million)

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U.S. VS China: CTEM Strategy and Operations total market, key domestic companies, and share, (USD Million)

Global CTEM Strategy and Operations revenue by player, revenue and market share 2021-2026, (USD Million)

Global CTEM Strategy and Operations total market by Type, CAGR, 2021-2032, (USD Million)

Global CTEM Strategy and Operations total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global CTEM Strategy and Operations 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 Accenture, Deloitte, IBM Security, EY, PwC, Capgemini, NTT DATA, HCLTech, TCS, Orange Cyberdefense, 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 CTEM Strategy and Operations 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 CTEM Strategy and Operations Market, By Region:

United States

China

Europe

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Japan

South Korea

ASEAN

India

Rest of World

Global CTEM Strategy and Operations Market, Segmentation by Type:

Ai-Driven Service Providers

Automated Operation Service Providers

Attack and Defense Verification Service Providers

Global CTEM Strategy and Operations Market, Segmentation by Deployment Method:

Cloud-based

On-premise

Global CTEM Strategy and Operations Market, Segmentation by Target Users:

Large Enterprise

SMEs

Global CTEM Strategy and Operations Market, Segmentation by Application:

Healthcare

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Government and Defense

IT and Telecommunications

Others

Companies Profiled:

Accenture

Deloitte

IBM Security

EY

PwC

Capgemini

NTT DATA

HCLTech

TCS

Orange Cyberdefense

Google Cloud

Palo Alto Networks

KPMG

Infosys

Wipro

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Telef?nica Tech

Eviden

DXC Technology

NCC Group

Optiv

Sophos

Key Questions Answered
1. How big is the global CTEM Strategy and Operations market?
2. What is the demand of the global CTEM Strategy and Operations market?
3. What is the year over year growth of the global CTEM Strategy and Operations market?
4. What is the total value of the global CTEM Strategy and Operations market?
5. Who are the Major Players in the global CTEM Strategy and Operations market?
6. What are the growth factors driving the market demand?

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