

# Global CTEM Strategy and Operations Market Growth (Status and Outlook) 2026-2032

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## Abstracts

The global CTEM Strategy and Operations market size is predicted to grow from US\$ 1255 million in 2025 to US\$ 3076 million in 2032; it is expected to grow at a CAGR of 14.1% from 2026 to 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.

LPI (LP Information)' newest research report, the 'CTEM Strategy and Operations Industry Forecast' looks at past sales and reviews total world CTEM Strategy and Operations sales in 2025, providing a comprehensive analysis by region and market sector of projected CTEM Strategy and Operations sales for 2026 through 2032. With CTEM Strategy and Operations sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world CTEM Strategy and Operations industry.

This Insight Report provides a comprehensive analysis of the global CTEM Strategy and Operations landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on CTEM Strategy and Operations portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global CTEM Strategy and Operations market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for CTEM Strategy and Operations and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global CTEM Strategy and Operations.

This report presents a comprehensive overview, market shares, and growth opportunities of CTEM Strategy and Operations market by product type, application, key players and key regions and countries.

#### Segmentation by Type:

Ai-Driven Service Providers

Automated Operation Service Providers

Attack and Defense Verification Service Providers

#### Segmentation by Deployment Method:

Cloud-based

On-premise

#### Segmentation by Target Users:

Large Enterprise

SMEs

#### Segmentation by Application:

Healthcare

Government and Defense

IT and Telecommunications

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analyzing the company's coverage, product portfolio, its market penetration.

Accenture

Deloitte

IBM Security

EY

PwC

Capgemini

NTT DATA

HCLTech

TCS

Orange Cyberdefense

Google Cloud

Palo Alto Networks

KPMG

Infosys

Wipro

Telefonica Tech

Eviden

DXC Technology

NCC Group

Optiv

Sophos

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