

# **India Operational Technology Security Market, By Component (Solutions (OT Endpoint Security, OT Network Segmentation, Anomaly Detection, Incident Response and Reporting, and Others) and Service (Professional and Managed)), By Deployment (Public, Private and Hybrid), By Enterprise Size (Small & Medium Enterprise and Large-Sized Enterprise), By End-User (BFSI, Power & Energy, Manufacturing, Transportation & Logistics, Mining, Oil & Gas, and Others), By Region, Competition Forecast & Opportunities, 2029F**

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## **Abstracts**

India Operational Technology Security market is growing owing to the rising demand from energy industry, leading to an increasing focus on protecting industrial systems and networks from cyber-attacks to overcome the need for securing and controlling critical infrastructures such as power stations. OT Security refers to the protection of physical devices and systems that are used in industrial and infrastructure sectors, such as oil and gas, power and water utilities, transportation, and manufacturing. These systems are critical to the functioning of various industries and are increasingly being connected to the internet, making them vulnerable to cyber-attacks. In addition, technological advancement such as installment of 5G infrastructure for faster internet connectivity and growth in cloud services, has further boosted the demand for operational technology security. Government policy measures such as Cyber Surakshit Bharat initiative, digital India initiative, and the evolution of cloud computing (Meghraj) in government organizations, are further increasing the demand for more operational

technology security in the country. Moreover, the increasing digitalization has proliferated cyber-attacks in various process industries to hamper the critical infrastructures, making many enterprises heavily relying on operational technology security platforms. Several factors are driving the demand for OT security solutions in India, including the increasing adoption of internet-connected devices and systems, rising awareness about the risks of cyber-attacks, and the growing need to comply with regulatory requirements. Additionally, vendors are making significant product innovations by integrating technologies such as artificial intelligence (AI), Industrial Internet of Things (IIoT), machine learning (ML), to cater to customer needs, aiding customer service, and market requirements, all helping to impose a positive outlook. These aspects are promoting the development of the operational technology security market of India throughout the forecast period.

### The Increased Use of Digital Technologies in Industrial Systems Is Driving the Market Growth

The increased use of digital technologies in industrial systems is another major driver of the market growth of Operational Technology (OT) security in India. Digital technologies such as cloud computing, big data analytics, and the Internet of Things (IoT), are transforming the way industries operate and manage their assets, leading to improved efficiency, productivity, and cost savings. However, with the increased adoption of digital technologies in industrial systems, the risk of cyber-attacks has also increased significantly. Industrial Control Systems (ICS) and Supervisory Control and Data Acquisition (SCADA) systems that are used in critical infrastructure sectors such as oil and gas, power and water utilities, transportation, and manufacturing are often vulnerable to cyber-attacks, which can result in operational downtime, physical damage, and even loss of life. As a result, there is a growing need for operational technology security solutions in India to protect these critical industrial systems from cyber threats. Operational technology security solutions such as firewalls, intrusion detection systems, and security information and event management (SIEM) systems are becoming more widely adopted by organizations to protect their industrial control systems and SCADA systems from cyber-attacks.

Moreover, the Indian government has also recognized the importance of operational technology security and has taken several initiatives and centers such as Cyber Surakshit Bharat, Indian Computer Emergency Response Team (CERT-In), and Cyber Crime Coordination Centre (I4C) etc., to enhance the cybersecurity posture of critical infrastructure sectors. For example, the National Critical Information Infrastructure Protection Centre (NCIIPC) has initiated several initiatives to make it easier to protect

critical information infrastructure, raise awareness about how to lessen the vulnerabilities of critical information infrastructure, and defend against cyberterrorism, cyberwarfare, and other threats. It has also provided organizations with frameworks and guidelines to help them improve their operational technology security measures. Overall, the increased use of digital technologies in industrial systems is a key driver of the market growth of operational technology security in India, as organizations seek to protect their critical infrastructure from cyber threats and comply with regulatory requirements.

### Increasing Adoption of Cloud Computing Environment

The popularity of cloud computing is accelerating and expanding tremendously in India. This is due to the government's encouragement of adopting cutting-edge, developing technologies, as well as best practices drawn from various cloud deployment scenarios and application domains. Cloud computing service providers are making investments in new data centres and cloud regions in India to meet this expanding demand. As India is ushering towards "Digital India", it becomes essential for the government to embrace the cloud to enhance governance and meet the citizen's expectations. In addition, due to the various advantages such as minimized IT costs with the reduction of delivery times, reduced capex and opex to deliver business services, the demand for enabling cloud computing by the enterprises are rising. This has enabled many services providers to adapt cloud as an essential technology platform to increase their product demand. Therefore, increasing adoption of cloud computing environment is driving the growth of Operational Technology Security in the Indian market.

### Rising Demand from Power Industry are Propelling the Market Growth

The convergence of operational technology and Information technology is empowering the power industry to reimagine their business from front-end to back-end, making enterprises services more accessible than before. Operational technology security in the power industry is aiding in optimizing performance, increasing process efficiency, reducing costs, and enhancing consumer services. The energy sector is essential to nearly every aspect of modern life. Many energy enterprises have implemented OT security for automating operations and modernizing substations. With the increasing digitization and proliferation of integrated technologies, the energy businesses are encountering more and more intrusions and are increasingly exposed to cybersecurity threats every year. Operational technology components like smart meters and other line sensors provide near real-time information, which can be combined with IT accessories like GIS to pinpoint the location of the problem and securing the infrastructure. In

In addition, to re-stabilize the grid and improve grid frequency, many companies have implemented an hour-based system at the SLDC, which relates to the SCADA facility as well as various 33 kV, 132 kV and 220 kV feeder substations, indicating power flow and the status of breakers and isolators in the grid. For instance, Odisha Power Transmission Corporation Limited (OPTCL) recently implemented automatic demand-side management system (ADMS) which enable remote control and operate over 180 numbers of 33 kV feeders in security with the regulatory provisions. Furthermore, the Indian Government's Ministry of Power (MoP) and the Central Electricity Authority (CEA) recently released cybersecurity guidelines regarding enhancing the power industry's cybersecurity readiness, along with training operational technology personnel on cyber security, and cyber security training institutes as well as testing labs in the country. These guidelines are enabling operation technology security into various training institutions and enterprises. Therefore, the rising demand from power industry such as SCADA security in securing critical infrastructure and navigating the ever-changing cyber-threat landscape and many more, are drawing attention to more and more customers to adopt operational technology security.

## Market Segmentation

Based on components, the market is segmented into solutions and service. The solution segment is further categorized into OT endpoint security, OT network segmentation, anomaly detection, incident response and reporting, and others. The service segment is further categorized as professional and managed. Based on deployment, the market is segmented into public, private and hybrid. Based on enterprise size, the market is divided into small & medium enterprise and large-sized enterprise. Based on end-user, the market is segmented BFSI, power & energy, manufacturing, transportation & logistics, mining, oil & gas, and others.

## Market Player

Major market players in the India Operational Technology Security Market are Rockwell Automation India Pvt. Ltd, IBM Corporation, Oracle Corporation, Schneider Electric India Pvt. Ltd., ABB India Ltd., Emerson Electric Company (India) Private Limited, Honeywell International India Private Limited.

## Report Scope:

In this report, the India Operational Technology Security market has been segmented into the following categories, in addition to the industry trends which have also been

detailed below:

### India Operational Technology Security Market, By Component:

#### Solutions

OT Endpoint Security

OT Network Segmentation

Anomaly Detection

Incident Response and Reporting

Others

#### Service

Professional

Managed

### India Operational Technology Security Market, By Deployment:

Public

Private

Hybrid

### India Operational Technology Security Market, By Enterprise Size:

Small & Medium Enterprise

Large-Sized Enterprise

### India Operational Technology Security Market, By End User:

BFSI

Power & Energy

Manufacturing

Transportation & Logistics

Mining

Oil & Gas

Others

India Operational Technology Security Market, By Region:

East India

West India

North India

South India

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the India Operational Technology Security market.

Available Customizations:

India Operational Technology Security market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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(Note: The companies list can be customized based on the client requirements.)

The data given for any year represents the market during the period, i.e, 1st April of the former year to 31st March of the latter year. Eg: For FY2024E, the data represents the period, from 1ST April 2023 to 31st March 2024.

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