

OT Security Platforms

ANMD-MRS15-144 · Grid & Energy Cyber-Physical Security

A Global Sustainability Due Diligence & Market Research Study

History 2020–2024 · Base Year 2025 · Forecast 2025–2032 · Outlooks 2035 / 2040 / 2050 · Currency US\$

WHY THIS REPORT

OT security platforms deliver unified asset visibility, threat detection and risk management across operational-technology environments in energy and critical infrastructure, turning unmanaged control estates into monitored, governed systems. This decision-grade study sizes the global market three ways — value, seats/licences and monitored assets — across platform type, deployment model and application, across seven regions and four scenarios to 2032, with outlooks to 2050.

SUSTAINABILITY & SDG IMPACT — THE ANMD LENS

Sustainability is this report's backbone, not an afterthought. Beyond function, OT security platforms safeguard the critical infrastructure delivering clean energy and essential services, while preventing disruptive incidents reduces outage emissions and losses and strengthens the resilience story.

Mapped Sustainable Development Goals:

| | | |
|---|---|---------------------------------|
| SDG 7 Affordable & Clean Energy | SDG 9 Industry & Infrastructure | SDG 13 Climate Action |
|---|---|---------------------------------|

Measurable sustainability outcomes assessed:

- Unified OT asset visibility and risk governance
- Reduced incident-driven outages, emissions and losses
- Resilient delivery of clean energy and essential services
- Detection coverage and asset-inventory integrity as material risks

Framework alignment: Double materiality mapped to GRI, SASB, ISSB, TCFD, TNFD, CSRD and the EU Taxonomy, with greenwashing and SDG-washing screens applied throughout.

WHAT'S INSIDE AT A GLANCE

| | | | |
|------------------------------------|-------------------------------|----------------------------------|-------------------------------|
| 53 Chapters | 9 Report Parts | 7 Regions Covered | 40+ Country Markets |
| 2025–32 Forecast Horizon | 4 Forward Scenarios | 25+ Companies Profiled | 3 SDGs Mapped |

REPORT COVERAGE

Geographic scope: North America, Europe, Asia Pacific, Latin America, Africa, Middle East and Rest of World — with named country intelligence. North America is the value leader (United States, Canada) on critical-infrastructure security spend; Europe is the policy leader (Germany, France, United Kingdom) on NIS2 and IEC 62443; Asia Pacific is the scale engine; other regions assessed on their own merits.

MARKET OVERVIEW

From unmanaged control estates to monitored, governed OT environments.

The OT security platform market is moving from unmanaged control estates to monitored, governed environments. Demand is driven by IT/OT convergence and threat escalation converging with regulatory mandates, supported by strong momentum across North America, Europe and Asia Pacific. The market is read three ways — value, seats/licences and monitored assets — and forecast under four scenarios, each region reported separately.

- **North America is the value leader** — United States and Canada, on critical-infrastructure security spend
- **Europe is the policy leader** — Germany, France and United Kingdom, on NIS2 and IEC 62443
- **Asia Pacific is the scale engine** — China, Japan and India, on industrial and grid build-out
- **Asset visibility is the differentiator** — passive discovery, threat detection and OT risk governance

REGIONAL OUTLOOK

Across seven reporting regions, the report separates early-commercialisation and policy-leading markets from high-growth and emerging markets — each profiled in full rather than aggregated into Rest of World.

| Region | Stage | Lead Markets & Drivers |
|---------------|---------------|--|
| North America | Value leader | United States, Canada — critical-infrastructure security spend |
| Europe | Policy leader | Germany, France, United Kingdom — NIS2, IEC 62443 |
| Asia Pacific | Scale engine | China, Japan, India — industrial and grid build-out |
| Middle East | High-growth | Saudi Arabia, UAE — critical-infrastructure investment |
| Latin America | Emerging | Brazil, Mexico — OT-security demand |
| Africa | Emerging | South Africa, Nigeria — infrastructure-security build-out |

KEY MARKET DRIVERS & RESTRAINTS

| Drivers | Restraints |
|--|---|
| <ul style="list-style-type: none"> • IT/OT convergence and asset-visibility demand • Critical-infrastructure threat escalation • Regulatory mandates (NIS2, IEC 62443, NERC CIP) • Risk governance and incident-containment value • Passive discovery and AI-detection technology gains | <ul style="list-style-type: none"> • Legacy and brownfield OT integration • Passive-monitoring coverage gaps • Alert fatigue and OT skills shortage • Deployment and segmentation complexity • Standards, validation and interoperability scrutiny |

SEGMENTATION SNAPSHOT

| | |
|--------------------------|---|
| By Platform Type | Asset discovery · threat detection · vulnerability management · OT-SIEM / SOC · risk governance |
| By Deployment | On-premise · cloud-managed · hybrid · air-gapped |
| By Application | Energy & utilities · manufacturing · oil & gas · transport |
| By End User | Utilities · industrial operators · MSSPs · integrators · OEMs |
| By Business Model | Subscription / SaaS · seat-based · managed-detection · outcome-based |
| By Scale | Site · enterprise · multi-site critical-infrastructure |

TABLE OF CONTENTS — PARTS & CHAPTERS

The full report is organised into nine parts across 53 chapters, listed below. Detailed sub-headings, country tables and directories are provided in the full report.

Part I — Report Foundation, Discovery and Strategic Intelligence

- › Chapter 1. Scope, Methodology and Report Architecture
- › Chapter 2. Industry Discovery Summary — OT Security Platforms
- › Chapter 3. Executive Intelligence and Decision Dashboard
- › Chapter 4. Strategic Findings, Materiality and Investment Verdict Preview

Part II — Market Intelligence, Sizing, Forecasting and Segmentation

- › Chapter 5. Industry Overview and Market Evolution
- › Chapter 6. Market Dynamics
- › Chapter 7. Global Market Size and Forecast, 2020–2032
- › Chapter 8. Market Segmentation Analysis
- › Chapter 9. End-User and Demand-Side Intelligence
- › Chapter 10. Pricing, Cost and Commercial Model Intelligence

Part III — Regional and Country Intelligence

- › Chapter 11. Global Regional Intelligence Framework
- › Chapter 12. North America Market Intelligence
- › Chapter 13. Europe Market Intelligence
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- › Chapter 15. Latin America Market Intelligence
- › Chapter 16. Africa Market Intelligence
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- › Chapter 18. Rest of World Market Intelligence

Part IV — Technology, Innovation and Category-Specific Intelligence

- › Chapter 19. Technology Landscape and Architecture
- › Chapter 20. Emerging and Next-Generation Technology Intelligence
- › Chapter 21. Category-Specific Intelligence Module
- › Chapter 22. Research, Innovation and Funding Landscape

Part V — Company, Competition, Patent and Project Intelligence

- › Chapter 23. Competitive Landscape
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- › Chapter 25. Mergers, Acquisitions, Partnerships and Ecosystem Intelligence
- › Chapter 26. Patent Landscape and Intellectual Property Intelligence
- › Chapter 27. Project, Deployment and Case-Study Intelligence

Part VI — Sustainability, ESG, SDG, Climate and Natural-Capital Intelligence

- › Chapter 28. Sustainability Intelligence Suite
- › Chapter 29. ESG Intelligence and Double Materiality
- › Chapter 30. ESG and Sustainability Framework Alignment
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- › Chapter 32. Carbon, Net-Zero and Climate-Mitigation Intelligence
- › Chapter 33. Water, Biodiversity and Natural-Capital Intelligence
- › Chapter 34. Circular Economy and Resource-Security Intelligence
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Part VII — Supply Chain, Policy, Legal, Economics and Finance

- › Chapter 37. Value Chain, Supply Chain and Geopolitical Intelligence
- › Chapter 38. Policy, Regulation and Incentive Intelligence
- › Chapter 39. Legal, Contracting and Risk-Allocation Intelligence
- › Chapter 40. Unit Economics, CAPEX, OPEX and Return Analysis
- › Chapter 41. Investment, Sustainable Finance and Bankability Intelligence

Part VIII — Scenario, Future Intelligence and Final Due Diligence Verdict

- › Chapter 42. Scenario Analysis and Future Intelligence
- › Chapter 43. Sustainability Due Diligence Framework and Data-Room Index
- › Chapter 44. Risk Register, RAG Rating and Anti-Greenwashing Screen
- › Chapter 45. Bottom-Line Verdict and Strategic Recommendations
- › Chapter 46. Implementation Roadmap and Stakeholder Playbooks

Part IX — Annexes, Directories and Reference Material

- › Chapter 47. Methodology Annex
- › Chapter 48. Corporate Directory and Company Intelligence Annex
- › Chapter 49. Patent Directory and Patent Intelligence Annex
- › Chapter 50. Project Intelligence Annex
- › Chapter 51. Forecast Annex
- › Chapter 52. Sustainability KPI Annex
- › Chapter 53. Reference Annexes

COMPETITIVE & INVESTMENT SNAPSHOT

The competitive field spans OT-security platform leaders, specialist detection vendors, and emerging asset-visibility innovators. Deal activity — M&A, technology acquisition and platform expansion — signals a market consolidating around scalable, unified OT-security platforms.

Representative players profiled in the full report:

Dragos, Inc. · Claroty Ltd. · Nozomi Networks Inc. · Tenable Holdings, Inc. (Tenable OT Security) · Microsoft Corporation (Defender for IoT) · and 20+ further profiled players across OT-monitoring and detection innovators.

Investment intelligence: venture, infrastructure, development, climate and blended finance, green bonds and sustainability-linked loans — culminating in a bankability assessment and a Go / No-Go / Conditional-Go investment verdict.

KEY QUESTIONS THIS REPORT ANSWERS

- ? How large is the global of security platforms market, and how fast will it grow to 2032?
- ? Which regions, countries and segments offer the strongest risk-adjusted opportunity?
- ? How does unified asset visibility change resilience value versus point detection tools?
- ? Who leads, and where is the competitive and patent white space?
- ? Is the investment case bankable — and under what conditions?
- ? How does the category align with the SDGs, circular-economy and resource-security and disclosure regulation?

WHY ANMD — THE DIFFERENCE

Most market studies stop at units and revenue. This report is built as a sustainability due diligence instrument — fusing market sizing with ESG, SDG, climate, water and natural-capital intelligence and a decision-ready bankability verdict in a single architecture.

- **Triangulated sizing** — every market read three ways so value, volume and coverage views reconcile rather than conflict.
- **Region-honest forecasting** — Latin America, Africa and the Middle East reported in full, never hidden inside Rest of World, every forecast resolved to the 2025 base year.
- **Integrated evidence base** — company, patent and project databases linked to the analysis, with published-filing patents and FTO treated as an indicator, not a legal conclusion.
- **No-fabrication discipline** — every estimate carries a data-confidence rating and disclosed sources; gaps are flagged for further diligence, never filled with invented numbers.
- **Anti-greenwashing rigour** — SDG-washing and greenwashing screens plus claim-substantiation checks built into the ESG and project analysis.
- **Decision-first structure** — 9 Parts and 53 Chapters culminating in stakeholder playbooks and a clear Go / No-Go / Conditional-Go investment verdict.

WHO SHOULD BUY THIS REPORT

Investors and infrastructure / PE funds, utilities and industrial operators, MSSPs and integrators, OT-security and resilience leaders, regulators and standards bodies, and corporate strategy and security teams.

Access the Full Report

The complete report delivers all 53 chapters in full, with every sub-heading, country table, company and patent directory, forecast model and due diligence checklist.

Purchase at www.anewmarketdynamics.com · Standard & Premium licences · Single-Site (SSL) and Global-Site (GSL) options at checkout.

Want the Complete Detailed Table of Contents?

This prospectus lists the nine parts and 53 chapters. The complete detailed table of contents — every sub-heading, country table, exhibit, company and patent directory and annex — is available on request to registered users. To receive it, register with your official company email at www.anewmarketdynamics.com. The full detailed table of contents will be sent directly to your registered company email address.