

## **Europe Security Testing - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

Market Report | 2025-06-01 | 120 pages | Mordor Intelligence

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### **Report description:**

Europe Security Testing Market Analysis

The Europe Security Testing Market size is estimated at USD 31.32 billion in 2025 and is projected to reach USD 88.16 billion by 2030, growing at a robust CAGR of 23% during the forecast period. This nearly threefold expansion reflects the intensifying digital threat landscape across Europe, where organizations face increasingly sophisticated cyber threats amid accelerated digital transformation initiatives. The market's growth trajectory is significantly steeper than historical patterns, indicating a fundamental shift in security priorities across the continent.

The market is being reshaped by stringent regulatory forces, particularly the implementation of the Network and Information Security Directive 2 (NIS2) and Digital Operational Resilience Act (DORA), which mandate comprehensive security testing for critical sectors. Cloud deployment dominates with 61% market share in 2024, while application security testing represents the largest type of segment at 39%. The United Kingdom leads geographically with 23.11% market share, though France exhibits the fastest growth at 26.4% CAGR through 2030, driven by substantial government investments in cybersecurity infrastructure.

Competitive intensity in the market is escalating as established players like Accenture and IBM face pressure from specialized European security testing providers leveraging AI-driven automation to deliver more efficient testing solutions. The market is witnessing a notable shift toward Interactive Application Security Testing (IAST), growing at 27.8% CAGR, as organizations seek to reduce false positives and integrate security earlier in development cycles. This trend is particularly pronounced in the manufacturing sector, which is experiencing the fastest growth among end-users at 25.2% CAGR due to increasing industrial IoT adoption and the convergence of IT and OT security requirements.

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The fragmented data sovereignty rules across EU member states are creating implementation challenges for cloud-based security testing solutions, though this is simultaneously driving innovation in hybrid deployment models that can satisfy both operational and compliance requirements. The market's evolution is further characterized by the emergence of specialized testing methodologies for quantum-resistant cryptography, particularly in financial services and government sectors, where early pilots are already underway to prepare for post-quantum security threats.

## Europe Security Testing Market Trends and Insights

### Heightened Post-2023 Critical-Infrastructure Cyber-Attacks

A succession of sophisticated attacks on European power grids and rail systems in 2024 pushed critical-infrastructure operators to overhaul testing blueprints. ENISA logged a 38% rise in incidents, with OT infiltration techniques bypassing legacy perimeter controls. Security budgets have been redirected toward services capable of mapping vulnerabilities across converged IT-OT environments, especially in distribution networks handling supervisory control and data acquisition traffic. Providers responding with combined red- and blue-team engagements are benefiting from contract sizes that now extend across multi-country footprints. Expansion of mandatory incident reporting regimes further cements demand, as real-time testing evidence becomes essential for regulatory filings.

### Accelerated EU NIS2 & DORA Compliance Deadlines

NIS2 enforcement in October 2024 and DORA's go-live in January 2025 compressed compliance windows and forced organizations to institutionalize recurring security assessments. DORA's three-year threat-led penetration-testing cycle for banks has already triggered multiyear framework agreements with external testers, while NIS2's supply-chain focus is driving downstream validation of third-party code repositories. Cross-border conglomerates are centralizing test orchestration to avoid audit duplication, spurring uptake of unified platforms that schedule, execute, and document evidence for multiple regulators.

### Shortage of CREST-Certified Security Testers

Europe's talent deficit remains acute, with the United Kingdom alone needing 7,000 additional professionals every year. The gap is especially sharp in cloud and OT disciplines, delaying project kick-offs for large transformation programs. Automation mitigates routine tasks yet cannot replace the contextual analysis clients expect from senior testers, thereby constraining the absolute delivery capacity of the Europe security testing market.

Other drivers and restraints analyzed in the detailed report include:

Shift-Left DevSecOps Adoption in the Software Supply Chain / Industrial IoT Penetration in German Mittelst and Factories / Budget Freeze Across EU-27 SMEs Amid 2024 Credit-Tightening /

For complete list of drivers and restraints, kindly check the Table Of Contents.

### Segment Analysis

Cloud-based models delivered 61% of the Europe security testing market in 2024 and are on track for a 26.01% CAGR through 2030. The Europe security testing market size for cloud deployment is projected to reach USD 54 billion by 2030, reflecting mounting demand for elastic test environments that replicate attacker geographies within minutes. United Kingdom enterprises

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typically launch weekly external attack simulations from cloud-native platforms, while German firms favour hybrid configurations that retain encryption keys on-premises. Providers now bundle sovereign-cloud controls such as in-region key management and dedicated SOC staffing to satisfy France's strict data-locality statutes. On-premises installations remain relevant where classified information is processed, notably in defense ministries, yet even these agencies pilot secure "compute-out, data-in" patterns that keep test logs offsite while restricting raw data exfiltration. As European hyperscalers pledge multibillion-euro investments in regional zones, hybrid orchestration has emerged as a pragmatic bridge for organizations balancing operational agility with national-security mandates. The Europe security testing market therefore continues to pivot toward integrated deployment portfolios that shift workloads seamlessly between private racks and regulated clouds without disrupting audit trails.

Application security testing (AST) generated 39% of the Europe security testing market revenue in 2024 and leads adoption curves as web, mobile, and serverless workloads multiply. Within AST, cloud-specific assessments post the steepest climb at 31% CAGR, propelled by DORA clauses obliging financial entities to review both legacy and containerized code. The Europe security testing market share for AST is bolstered by continuous integration tools that embed dynamic scans into commit pipelines, enabling risk triaging before production. Network security testing still anchors zero-trust rollouts, particularly for segmenting flat networks amassed through M&A activity. VPN assessments gained urgency following publicized remote-access exploits that bypassed multi-factor authentication. Firewall testing, formerly a ruleset hygiene exercise, now incorporates evasive-traffic emulation to gauge inspection depth against adversaries using domain fronting. As cloud, mobile, and API surfaces converge, enterprises increasingly commission unified engagements that cross-reference findings from multiple test types, maximizing coverage without inflating budgets.

Europe Security Testing Market Segmented by Deployment (On-Premises, Cloud and Hybrid), Type (Network Security Testing, Application Security Testing and More), Testing Tool (Web Application Testing Tool, Code Review Tool and More), End-User Industry (Government, BFSI and More) and Country. The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Accenture / Atos / Cisco Systems / Core Security Technologies / CrowdStrike / Fortinet / Hewlett Packard Enterprise / IBM / Kaspersky / Micro Focus (CyberRes) / McAfee / Netcraft / Offensive Security / Orange Cyberdefense / Paladion (Tech Mahindra) / PwC / Qualys / Securonix / Synopsys / Veracode /

Additional Benefits:

The market estimate (ME) sheet in Excel format /  
3 months of analyst support /

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