

Global Power System Cybersecurity Range Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Power System Cybersecurity Range market size is expected to reach \$ 350 million by 2032, rising at a market growth of 5.6% CAGR during the forecast period (2026-2032).

Power System Cybersecurity Range is a platform designed to simulate a real-world power system network environment, enabling cybersecurity research, testing, drills, and talent development. The upstream component of the industry chain primarily involves range component and platform development, including core software and technologies such as simulation modeling, virtualization, attack and defense countermeasures, and assessment modules. The midstream involves the integration and delivery of range solutions, encompassing platform construction, scenario customization, and operations and maintenance services. Downstream end-use applications cover various business scenarios within the power industry, including production control and management informationization. The industry's gross profit margin is approximately 45-60%.

The main market drivers include the following:

Policy compliance and mandatory industry standards driving rigid demand

Globally, the power industry, as a critical infrastructure, is listed as a key area for cybersecurity protection by governments worldwide. At the policy level, legislation explicitly requires power companies to regularly conduct cybersecurity attack and defense drills, vulnerability assessments, and emergency response capability verification. For example, China's *Regulations on the Security Protection of Critical Information Infrastructure* and the EU's *Network and Information Security Directive* (NIS2) both include test range construction in compliance requirements.

Simultaneously, industry standardization organizations (such as IEC and IEEE) have released power network security testing specifications, clarifying that test ranges must have functions such as simulating real attack scenarios and verifying the effectiveness of security products, driving companies to shift from 'passive compliance' to 'proactive construction.' Driven by both policy and standards, test ranges have become a 'must-have' for cybersecurity investment in the power industry, especially with the continued release of demand in sub-sectors such as power generation, power grids, and new energy.

Evolving new cyberattack methods forcing a practical transformation of defense systems

The digitalization and intelligentization of power systems are accelerating, with SCADA, Industrial Control Systems (ICS), and IoT devices widely connected to networks, resulting in an exponential expansion of the attack surface. In recent years, APT attacks (such as the Ukrainian power grid incident) and ransomware attacks (such as the Colonial Pipeline incident) targeting power facilities have become increasingly frequent. Attackers utilize zero-day vulnerabilities and supply chain contamination to bypass traditional defenses, rendering traditional security testing methods (such as penetration testing) ineffective. The test range, by constructing a high-fidelity simulation environment, simulates core business scenarios such as power grid dispatching and substation control, supporting realistic exercises such as red team/blue team exercises and threat hunting. This helps enterprises identify blind spots in their defense systems and improve their ability to detect, respond to, and recover from unknown threats. Furthermore, the test range can reproduce historical attack events, providing security teams with 'immersive' training, shortening talent development cycles, and becoming a key tool for addressing advanced persistent threats.

Technological integration and scenario expansion are driving the evolution of test ranges towards intelligence and full-domain capabilities.

With the maturity of technologies such as AI, digital twins, 5G, and blockchain, the functionality of test ranges is upgrading from single attack and defense exercises to an integrated platform encompassing 'testing-verification-training-research.' For example, AI technology can automatically generate attack scripts and analyze the effectiveness of defense strategies; digital twin technology enables a 1:1 mapping between power equipment and networks, improving simulation accuracy; 5G and edge computing support the construction of distributed test ranges, covering emerging scenarios such as new energy power plants and microgrids. Meanwhile, the interconnection between the

power industry and other critical infrastructure (such as transportation and energy) is intensifying, increasing the risk of cross-industry attacks. Test ranges need to support multi-domain collaborative exercises to verify cross-system security linkage mechanisms. Furthermore, with the advancement of power market reforms, new business models such as virtual power plants and demand response are emerging, requiring test ranges to expand into new scenarios such as energy trading and data security to meet diversified security needs. Technological iteration and scenario expansion are jointly driving the test range market to transform from 'functional fulfillment' to 'value creation,' attracting more companies to increase investment.

This report studies the global Power System Cybersecurity Range demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Power System Cybersecurity Range, 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 Power System Cybersecurity Range that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Power System Cybersecurity Range total market, 2021-2032, (USD Million)

Global Power System Cybersecurity Range total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Power System Cybersecurity Range total market, key domestic companies, and share, (USD Million)

Global Power System Cybersecurity Range revenue by player, revenue and market share 2021-2026, (USD Million)

Global Power System Cybersecurity Range total market by Type, CAGR, 2021-2032, (USD Million)

Global Power System Cybersecurity Range total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Power System Cybersecurity Range 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 Northrop Grumman, Cisco, Leonardo, RTX, BAE Systems, Airbus, IBM, Keysight, Cyberbit, RHEA Group, 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 Power System Cybersecurity Range 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 Power System Cybersecurity Range Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Power System Cybersecurity Range Market, Segmentation by Type:

Cyber Range as a Service

Cyber Range solutions

Cyber Range Platform

Global Power System Cybersecurity Range Market, Segmentation by Deployment Method:

Cloud-based

On-premise

Hybrid

Global Power System Cybersecurity Range Market, Segmentation by Product Function:

Attack and Defense Drill

Vulnerability Research

Emergency Response

Compliance Verification

Global Power System Cybersecurity Range Market, Segmentation by Application:

Power Plant

Transmission and Distribution Unit

Other

Companies Profiled:

Northrop Grumman

Cisco

Leonardo

RTX

BAE Systems

Airbus

IBM

Keysight

Cyberbit

RHEA Group

Integrity Technology

Venustech

QIANXIN

Cyber Peace

H3C

NSFOCUS

Diateam

360 Digital Security Group

Key Questions Answered

1. How big is the global Power System Cybersecurity Range market?
2. What is the demand of the global Power System Cybersecurity Range market?
3. What is the year over year growth of the global Power System Cybersecurity Range market?
4. What is the total value of the global Power System Cybersecurity Range market?
5. Who are the Major Players in the global Power System Cybersecurity Range market?
6. What are the growth factors driving the market demand?

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