

Global Public Utility Cyber ??Range Market 2026 by Company, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Public Utility Cyber ??Range market size was valued at US\$ 1055 million in 2025 and is forecast to a readjusted size of US\$ 1515 million by 2032 with a CAGR of 4.4% during review period.

Public Utility Cyber ??Range, built based on virtualization and simulation technologies, is a dedicated cybersecurity training and testing platform for public utilities (such as power, water conservancy, transportation, and energy). By replicating real-world network environments, business systems, and attack scenarios, it provides utilities with a controlled experimental space for attack and defense drills, vulnerability verification, emergency response training, and system security testing. The upstream industry chain includes hardware suppliers such as sensors, network equipment, and servers, as well as providers of foundational technologies such as virtualization engines and simulation modeling software. The midstream includes system integrators and platform developers, responsible for range architecture design, virtual and real-world environment integration, and scenario orchestration. The downstream industry connects with public utilities, forming a closed-loop system of 'equipment supply - scenario customization - operational services.' The industry's gross profit margin is approximately 45-60%.

Key market drivers primarily include the following factors:

Heightened security requirements for critical infrastructure serve as the core driving force behind the development of cybersecurity ranges for public utilities.

Public utilities encompass essential service systems such as electricity, water, gas,

heating, transportation, and telecommunications. These systems are generally characterized by continuous operation, extensive geographical coverage, significant impact on public welfare, and a high prevalence of Industrial Control Systems (ICS). Should a ransomware attack, supply chain attack, ICS intrusion, or dispatch system anomaly occur, it could directly disrupt urban operations and compromise the stability of public services. Cybersecurity ranges enable the simulation of public utility IT systems, OT systems, dispatch platforms, SCADA, PLCs, DCSs, IoT endpoints, and business systems—all without impacting the actual production environment—to facilitate attack-and-defense exercises, vulnerability validation, emergency response, and security hardening. my country's *Cybersecurity Law* mandates that entities responsible for critical information infrastructure establish cybersecurity emergency response mechanisms and conduct regular drills; this legislative framework provides a solid institutional foundation for the development of cybersecurity ranges within the public utility sector.

Digital transformation and the networking of ICS expand the attack surface, driving the evolution of cybersecurity ranges from mere training tools into platforms for real-world operational validation.

Public utility entities are actively advancing initiatives such as smart grids, smart water management, smart gas networks, digital urban rail transit, remote operations and maintenance (O&M), IoT sensing, and cloud-based platform management. While these initiatives enhance operational efficiency, they also increasingly expose traditional—and historically relatively isolated—ICS environments to more complex and interconnected network landscapes. Traditional security training methods or tabletop exercises often struggle to accurately replicate the specific protocols, devices, network topologies, cascading failure scenarios, and cross-domain attack vectors found within actual production systems. In contrast, cybersecurity ranges can construct highly realistic simulation environments that closely mirror actual business operations, serving as platforms to validate security strategies, rehearse emergency response protocols, assess personnel capabilities, and test new security solutions. The U.S. Cybersecurity and Infrastructure Security Agency (CISA) also identifies ICS cybersecurity training as a critical measure for safeguarding vital infrastructure—such as power grids—indicating that the development of security capabilities within the public utility sector is shifting away from isolated, point-based defenses toward comprehensive, systemic exercises and continuous validation. Regulatory compliance, talent development, and the construction of a domestic security ecosystem are collectively driving market demand.

Cyber ??ranges for public utility sectors serve not only as platforms for security drills but

also support efforts related to classified protection schemes, critical information infrastructure protection, emergency plan validation, red-team vs. blue-team exercises, offensive and defensive drills, industrial control system (ICS) security training, and security product testing. As requirements regarding cybersecurity incident reporting, tiered response protocols, and emergency handling become increasingly stringent, public utility entities require security capabilities that are more quantifiable, reviewable, and capable of continuous improvement. Cyber ranges facilitate the systematic accumulation of attack samples, drill scripts, assessment metrics, and personnel capability profiles, thereby assisting organizations in establishing normalized cybersecurity operational mechanisms. The Measures for the Administration of Cybersecurity Incident Reporting issued by the Cyberspace Administration of China (CAC) further reinforce requirements for cybersecurity incident reporting and hierarchical management; notably, the operational disruption of critical information infrastructure is explicitly designated as a key criterion for classification. This regulatory emphasis will prompt public utility entities to place greater priority on practical combat drills, emergency response capabilities, and the development of platforms for validating security proficiency.

This report is a detailed and comprehensive analysis for global Public Utility Cyber Range market. Both quantitative and qualitative analyses are presented by company, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Public Utility Cyber Range market size and forecasts, in consumption value (\$ Million), 2021-2032

Global Public Utility Cyber Range market size and forecasts by region and country, in consumption value (\$ Million), 2021-2032

Global Public Utility Cyber Range market size and forecasts, by Type and by Application, in consumption value (\$ Million), 2021-2032

Global Public Utility Cyber Range market shares of main players, in revenue (\$ Million), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Public Utility Cyber ??Range

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Public Utility Cyber ??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 (US), Cisco (US), Leonardo (IT), RTX (US), BAE Systems (GB), Airbus (NL), IBM (US), Keysight (US), Cyberbit (IL), RHEA Group (BE), etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market segmentation

Public Utility Cyber ??Range market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for Consumption Value by Type and by Application. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Cyber Range as a Service

Cyber Range solutions

Cyber Range Platform

Market segment by Deployment Method

Cloud-based

On-premise

Hybrid

Market segment by Product Function

Attack and Defense Drill

Vulnerability Research

Emergency Response

Compliance Verification

Market segment by Application

Power Grid

Water Utilities

Transportation

Government Affairs

Other

Market segment by players, this report covers

Northrop Grumman (US)

Cisco (US)

Leonardo (IT)

RTX (US)

BAE Systems (GB)

Airbus (NL)

IBM (US)

Keysight (US)

Cyberbit (IL)

RHEA Group (BE)

Yongxin Zhicheng (CN)

Venustech (CN)

Qi'anxin (CN)

Saining Network Security (CN)

New H3C (CN)

NSFOCUS (CN)

Diateam (FR)

360 Digital Security Group (CN)

NEC?JP?

Market segment by regions, regional analysis covers

North America (United States, Canada and Mexico)

Europe (Germany, France, UK, Russia, Italy and Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia and Rest of Asia-Pacific)

South America (Brazil, Rest of South America)

Middle East & Africa (Turkey, Saudi Arabia, UAE, Rest of Middle East & Africa)

The content of the study subjects, includes a total of 13 chapters:

Chapter 1, to describe Public Utility Cyber ??Range product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top players of Public Utility Cyber ??Range, with revenue, gross margin, and global market share of Public Utility Cyber ??Range from 2021 to 2026.

Chapter 3, the Public Utility Cyber ??Range competitive situation, revenue, and global market share of top players are analyzed emphatically by landscape contrast.

Chapter 4 and 5, to segment the market size by Type and by Application, with consumption value and growth rate by Type, by Application, from 2021 to 2032.

Chapter 6, 7, 8, 9, and 10, to break the market size data at the country level, with revenue and market share for key countries in the world, from 2021 to 2026. and Public Utility Cyber ??Range market forecast, by regions, by Type and by Application, with consumption value, from 2027 to 2032.

Chapter 11, market dynamics, drivers, restraints, trends, Porters Five Forces analysis.

Chapter 12, the key raw materials and key suppliers, and industry chain of Public Utility Cyber ??Range.

Chapter 13, to describe Public Utility Cyber ??Range research findings and conclusion.

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