

Global Public Utility Cyber ??Range Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global Public Utility Cyber ??Range market size is predicted to grow from US\$ 1003 million in 2025 to US\$ 1463 million in 2032; it is expected to grow at a CAGR of 4.7% from 2026 to 2032.

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.

LPI (LP Information)' newest research report, the ?Public Utility Cyber ??Range Industry Forecast? looks at past sales and reviews total world Public Utility Cyber ??Range sales in 2025, providing a comprehensive analysis by region and market sector of projected Public Utility Cyber ??Range sales for 2026 through 2032. With Public Utility Cyber ??Range sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Public Utility Cyber ??Range industry.

This Insight Report provides a comprehensive analysis of the global Public Utility Cyber ??Range landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on Public Utility Cyber ??Range portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Public Utility Cyber ??Range market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Public Utility Cyber ??Range and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Public Utility Cyber ??Range.

This report presents a comprehensive overview, market shares, and growth opportunities of Public Utility Cyber ??Range market by product type, application, key players and key regions and countries.

Segmentation by Type:

Cyber Range as a Service

Cyber Range solutions

Cyber Range Platform

Segmentation by Deployment Method:

Cloud-based

On-premise

Hybrid

Segmentation by Product Function:

Attack and Defense Drill

Vulnerability Research

Emergency Response

Compliance Verification

Segmentation by Application:

Power Grid

Water Utilities

Transportation

Government Affairs

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analyzing the company's coverage, product portfolio, its market penetration.

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?

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