

Smart Grid Cyber Security

System Reliability, Defense-in-Depth, Business Continuity, Change Management, Secure Telecommunications, Endpoint Protection, Identity Management, and Security Event Management

One year ago, Stuxnet had just been discovered. A year's worth of analysis still has not unlocked all its secrets but it has had a profound influence upon the smart grid cyber security market. Utilities have – as many predicted – realized that their grids are no longer isolated or protected from attackers. Smart grids need intelligence or they are not smart. Adding that intelligence to grids will increase their attack surface and utilities know this.

Market drivers have appeared or gained importance during the past year. European smart metering deployments that were in early stages a year ago are into deployment phase, even if completion dates may stretch beyond 2020. The North American Electric Reliability Corporation (NERC) has begun issuing fines for non-compliance with its CIP reliability standards. Utilities believe that they will see greater benefits from Distribution Automation than from Advanced Metering Infrastructure (AMI) and Pike Research's forecasts indicate greater spending in that area. Much has changed for the positive. Unfortunately, one thing has not changed. Cyber security is still way behind the attackers. Even where strong countermeasures exist, they are not consistently deployed. More sophisticated attackers look at smart grids from a systemic perspective while often the defenses have been installed in piecemeal fashion, without an architecture. This hands an enormous advantage to the attackers.

This Pike Research report assesses the threats and vulnerabilities that confront smart grid technologies, to arrive at an analysis of the most significant cyber security investments and market opportunities. The report includes a detailed examination of key market drivers and barriers, along with profiles of key industry players and global forecasts, segmented by region and application area, for smart grid cyber security revenue through 2018.



KEY MARKET FORECASTS:

- Smart Grid Cyber Security Revenue by Region, World Markets: 2011-2018
- Smart Grid Cyber Security Revenue by Segment, World Markets: 2011-2018
- Revenue Comparisons, IT vs. ICS Security by Region, World Markets: 2011-2018
- Revenue Comparisons, IT vs. ICS Security by Segment, World Markets: 2011-2018
- Smart Grid Revenue by Segment and Region, World Markets: 2011-2018

GEOGRAPHIES:

- North America
- Latin America
- Western Europe
- Eastern Europe
- China
- Asia Pacific except China
- Middle East and Africa

TECHNOLOGIES:

- Advanced Metering Infrastructure (AMI)
- Antivirus (Blacklisting)
- Application Whitelisting
- Availability: Systems, Networks, Data
- Business Continuity Planning (BCP)
- Change Management
- Smart Grid Compliance
- Cyber Forensics
- Data Loss Prevention (DLP)
- Defense-in-Depth
- Device Authentication
- Dial-up Maintenance Ports
- Disaster Recovery
- Embedded Device Security
- Event Correlation
- ICS Security
- Identity and Authentication Management
- Intrusion Prevention System
- Information Technology Infrastructure Library (ITIL)
- Managed Security Services Providers (MSSP)
- Multifactor Authentication
- One-way Communications
- Public Key Infrastructure (PKI)
- Role-based Access Control (RBAC)
- SCADA Perimeter
- SCADA Security
- Security Incident Response
- Security Information and Event Management (SIEM)
- Situational Awareness
- Smart Grid Perimeter
- Smart Grid Patch Management
- Virtual Private Network (VPN)

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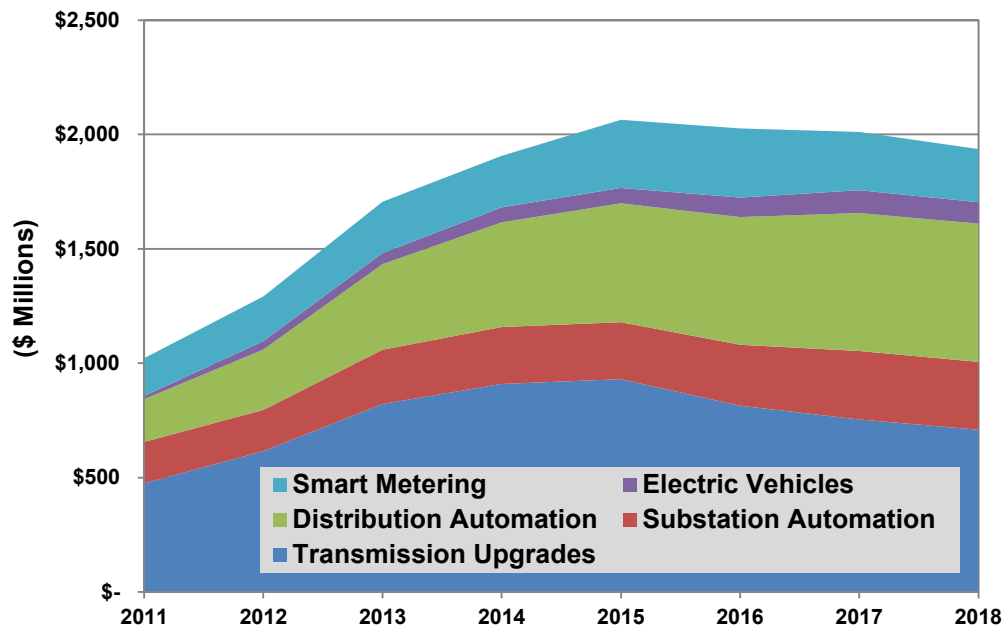
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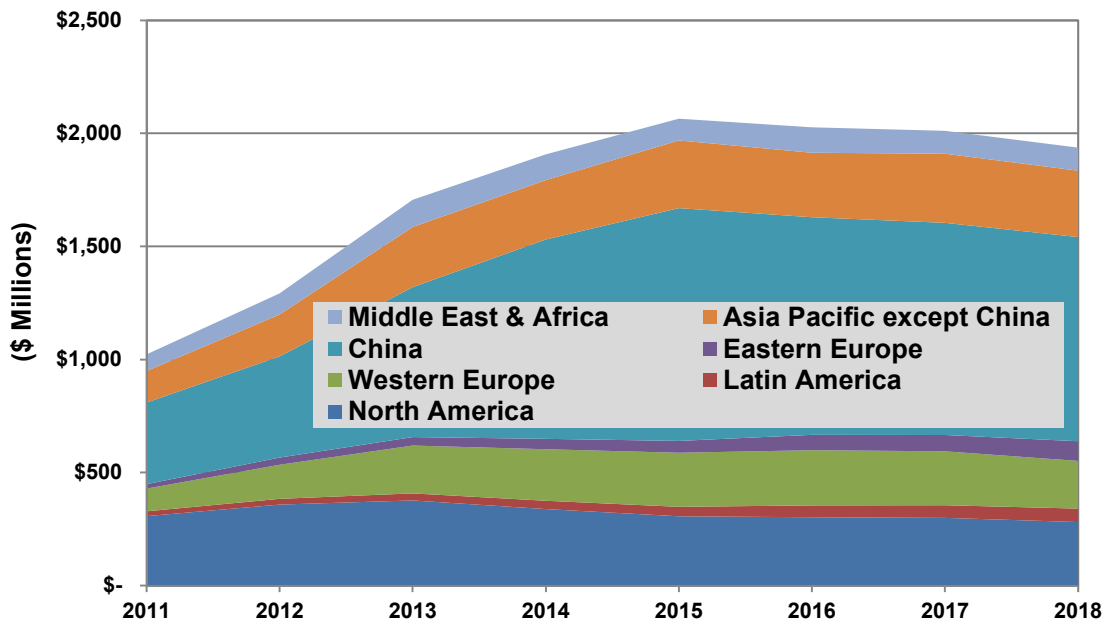
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Smart Grid Cyber Security Revenue by Segment, World Markets: 2011-2018



(Source: Pike Research)

Smart Grid Cyber Security Revenue by Region, World Markets: 2011-2018



(Source: Pike Research)

KEY QUESTIONS ADDRESSED:

- What are the key smart grid cyber security risks and vulnerabilities that are not adequately mitigated?
- What are the technologies mostly like to be purchased to improve the security of smart grids?
- How large is the smart grid cyber security market opportunity through 2018?
- Which areas of the smart grid have potential for the most cyber security revenue and the highest rates of growth?
- What are the most important technology issues for smart grid cyber security?
- What are the most important market issues for smart grid cyber security?
- What are the professional services opportunities for smart grid cyber security?

WHO NEEDS THIS REPORT?

- Smart grid security vendors
- Smart grid hardware and software vendors
- Systems integrators
- Security systems service providers
- Utilities
- Government agencies
- Investor community

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