Threat Intelligence Platforms for Utilities

ANMD-MRS15-150 · Grid & Energy Cybersecurity Technologies

A Global Sustainability Due Diligence & Market Research Study

History 2020–2024 · Base Year 2025 · Forecast 2025–2032 · Outlooks 2035 / 2040 / 2050 · Currency US$

WHY THIS REPORT

Threat intelligence platforms for utilities turn global attack data into grid-specific defence — the ICS/OT threat-intel, energy-sector threat feeds, vulnerability intelligence, threat-hunting and SOC, and ISAC information-sharing systems that give utilities early warning of the adversaries targeting them. As nation-state and criminal groups increasingly focus on energy, sector-specific, actionable intelligence is the difference between proactive defence and reactive cleanup. This decision-grade study sizes the global market three ways — value, subscriptions and endpoints — across intelligence type, intelligence tier and application, across seven regions and four scenarios to 2032, with outlooks to 2050.

SUSTAINABILITY & SDG IMPACT — THE ANMD LENS

Sustainability is this report's backbone, not an afterthought. Threat intelligence protects energy reliability and resilient infrastructure by enabling proactive, informed defence of the grid.

Mapped Sustainable Development Goals:

SDG 7	SDG 9	SDG 11	SDG 12	SDG 16
Affordable & Clean Energy	Industry, Innovation & Infrastructure	Sustainable Cities & Communities	Responsible Consumption & Production	Peace, Justice & Strong Institutions

Measurable sustainability outcomes assessed:

- Proactive, informed defence of energy infrastructure
- Resilient, reliable grid operation through early warning
- Intelligence-sharing confidentiality as a material risk
- Intelligence access for smaller utilities assessed

Framework alignment: Double materiality mapped to GRI, SASB, ISSB, TCFD, TNFD, CSRD and the EU Taxonomy, with greenwashing and SDG-washing screens applied throughout.

WHAT'S INSIDE AT A GLANCE

53 Chapters	**9** Report Parts	**7** Regions Covered	**40+** Country Markets
2025–32 Forecast Horizon	**4** Forward Scenarios	**25+** Companies Profiled	**5** SDGs Mapped

REPORT COVERAGE

Geographic scope: North America, Europe, Asia Pacific, Latin America, Africa, Middle East and Rest of World — with named country intelligence. North America dominates the field; ICS/OT-specific intelligence is the differentiator within it; IT-security majors extend to OT; other regions assessed on their own merits.

- Energy-sector-specific, ICS/OT-aware adversary intelligence
- Vulnerability intelligence, threat-hunting and SOC services
- ISAC information-sharing for collective sector defence
- Sharing confidentiality, data governance and access as material risks

MARKET OVERVIEW

From generic feeds to grid-specific defence — where ICS/OT-aware, actionable intelligence beats reactive cleanup.

Utility threat intelligence is moving from generic feeds to grid-specific, actionable defence. Demand is driven by nation-state and ransomware targeting, ICS/OT-specific intelligence needs and ISAC information-sharing across North America, Europe and Asia Pacific. The market is read three ways — value, subscriptions and endpoints — and forecast under four scenarios, each region reported separately.

- **North America dominates the field** — the United States, anchored by Dragos, Inc., Mandiant (Google LLC), Recorded Future, Inc., CrowdStrike Holdings, Inc. and Microsoft Corporation (Threat Intelligence)
- **ICS/OT-specific intelligence is the differentiator** — Dragos, Inc., Nozomi Networks Inc. and Claroty Ltd. provide energy-sector, control-system-focused intelligence
- **Sector-specific, actionable intel is the differentiator** — energy-focused, ICS-aware intelligence beats generic feeds for grid defenders
- **Intelligence tier segments the value** — strategic, operational and tactical/IOC, each serving different decision levels

REGIONAL OUTLOOK

Across seven reporting regions, the report separates leading markets from high-growth and emerging ones — each profiled in full rather than aggregated into Rest of World.

Region	Stage	Lead Country Markets & Drivers
North America	Threat-intel leader	United States — Dragos, Mandiant, Recorded Future, CrowdStrike
Europe	Adoption hub	UK, Germany — sector-intel & SOC services
Asia Pacific	Fast-growing	Japan, Australia — utility threat-intel uptake
Middle East	Emerging	Israel, UAE — sovereign threat-intel & SOC
Latin America	Emerging	Brazil — energy-sector intel
Africa	Frontier	South Africa — utility SOC & intel

KEY MARKET DRIVERS & RESTRAINTS

Drivers	Restraints
• Nation-state & ransomware targeting • ICS/OT-specific intelligence needs • Information-sharing via ISACs • Proactive threat-hunting & SOC • Vulnerability-intelligence demand	• Intelligence-to-action gap • OT-context & relevance filtering • Alert volume & analyst capacity • Sharing & confidentiality constraints • Skills & SOC-maturity variation

SEGMENTATION SNAPSHOT

By Intelligence Type	ICS/OT threat-intel · sector-specific (energy) threat feeds · vulnerability-intelligence · threat-hunting & SOC · information-sharing (ISAC)
By Intelligence Tier	Strategic · operational · tactical / IOC
By Delivery	Platform · feed · managed service
By End User	Utilities · grid operators · energy companies · ISOs / RTOs
By Business Model	Hardware sales · SaaS subscription · managed services
By Application	Generation · transmission & distribution · grid edge

TECHNOLOGY & APPLICATION FINDINGS

Where the category is differentiating fastest — the technology and application fronts that separate leaders from followers:

- **ICS/OT threat-intel** — energy-sector-specific adversary and TTP intelligence guides defence
- **Vulnerability intelligence** — prioritised, OT-aware vulnerability data focuses remediation
- **Threat-hunting & ISAC** — proactive hunting and information-sharing strengthen collective defence

TABLE OF CONTENTS — PARTS & CHAPTERS

The full report is organised into nine parts across 53 chapters, listed below. Detailed sub-headings, country tables and directories are provided in the full report.

COMPETITIVE & INVESTMENT SNAPSHOT

The competitive field spans ICS/OT-intel specialists and broad threat-intelligence majors. Deal activity — threat-intel acquisitions, OT-feed partnerships and ISAC collaborations — signals a market consolidating around sector-specific, actionable intelligence.

Representative players profiled in the full report:

Dragos, Inc. · Mandiant (Google LLC) · Recorded Future, Inc. · CrowdStrike Holdings, Inc. · Microsoft Corporation · Palo Alto Networks, Inc. (Unit 42) · Nozomi Networks Inc. · and 20+ further profiled players.

Investment intelligence: venture, infrastructure, development, climate and blended finance, green bonds and sustainability-linked loans — culminating in a bankability assessment and a conditional investment view.

KEY QUESTIONS THIS REPORT ANSWERS

- How large is the global utility threat intelligence market, and how fast will it grow to 2032?
- Which regions, countries and segments offer the strongest risk-adjusted opportunity?
- Which technologies and architectures reshape the addressable market and the cost curve?
- Who leads, and where is the competitive and patent white space?
- Is the investment case bankable — and under what conditions?
- How does the category align with the SDGs and disclosure regulation?

WHY ANMD — THE DIFFERENCE

Most market studies stop at units and revenue. This report is built as a sustainability due diligence instrument — fusing market sizing with ESG, SDG, climate and natural-capital intelligence and a decision-ready bankability view in a single architecture.

- **Triangulated sizing** — every market read three ways so value, volume and the physical-unit views reconcile rather than conflict.
- **Region-honest forecasting** — Latin America, Africa and the Middle East reported in full, never hidden inside Rest of World, every forecast resolved to the 2025 base year.
- **Integrated evidence base** — company, patent and project databases linked to the analysis, with published-filing patents and FTO treated as an indicator, not a legal conclusion.
- **No-fabrication discipline** — every estimate carries a data-confidence rating and disclosed sources; gaps are flagged for further diligence, never filled with invented numbers.
- **Anti-greenwashing rigour** — SDG-washing and greenwashing screens plus claim-substantiation checks built into the ESG and project analysis.
- **Decision-first structure** — 9 Parts and 53 Chapters culminating in stakeholder playbooks and a clear, conditional investment view.

WHO SHOULD BUY THIS REPORT

Utilities, grid operators, energy companies, ISOs/RTOs, SOC teams, investors and policymakers, and strategic corporate planners and decision-makers.

Access the Full Report

The complete report delivers all 53 chapters in full, with every sub-heading, country table, company and patent directory, forecast model and due diligence checklist.

Purchase at **www.anewmarketdynamics.com** · Standard & Premium licences · Single-Site (SSL) and Global-Site (GSL) options at checkout.

Want the Complete Detailed Table of Contents?

This prospectus lists the nine parts and 53 chapters. The complete detailed table of contents — every sub-heading, country table, exhibit, company and patent directory and annex — is available on request to registered users. To receive it, register with your official company email at **www.anewmarketdynamics.com**. The full detailed table of contents will be sent directly to your registered company email address.