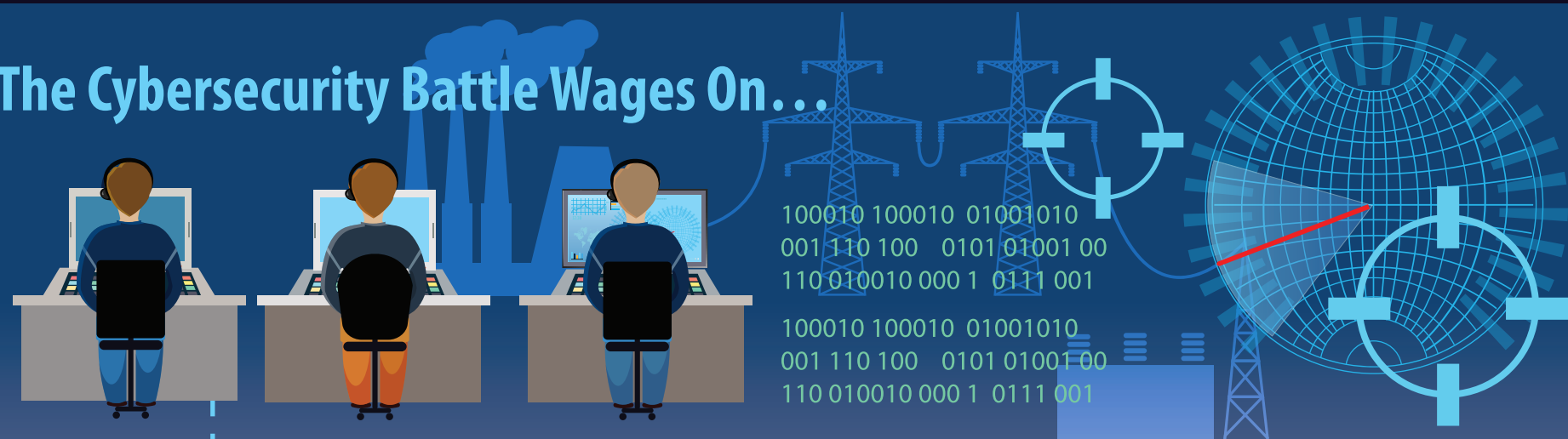
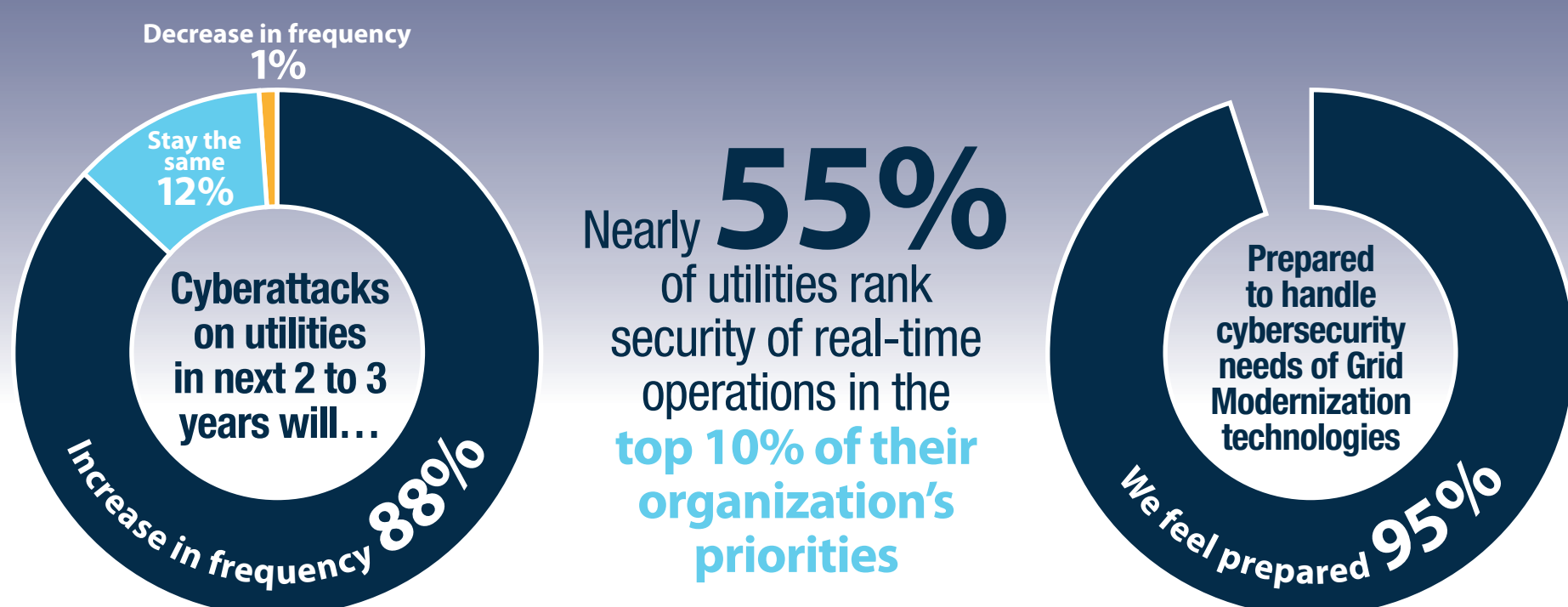


The State of Cybersecurity & Compliance for Utility Real-Time Operations

The Cybersecurity Battle Wages On...

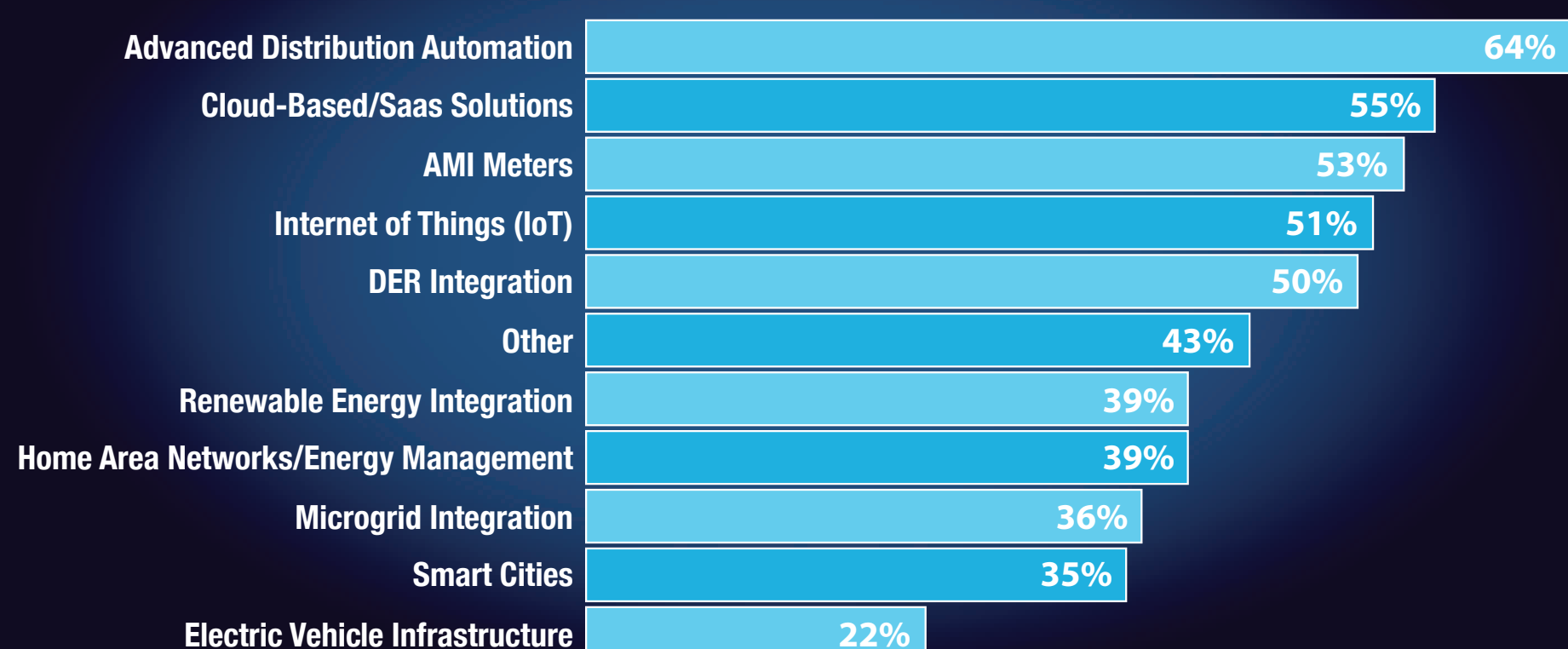


The digital nature of Grid Modernization efforts drives concern around security—both cyber and physical. How do utilities think cybersecurity will change in the coming years as they move ahead with Grid Modernization? Zpryme surveyed nearly 140 North American electric utilities to find out.



With so many policy and technology unknowns around Grid Modernization utilities will need to monitor their confidence level and be willing to respond to new organizational demands and evolving threats to maintain a secure state.

Cyber attack concerns are widespread across Grid Modernization initiatives. This could indicate utilities have not performed complete assessments on where their greatest risks lie.



Most utilities feel at least somewhat prepared to defend against cybersecurity attacks, but just **11%** of utilities **believe real-time operations are very secure.**

When an attack occurs, the TOP 5 IMPACTS associated with a cyberattack on utilities' real-time operations include:

1. Damage to electricity systems
2. Power outages
3. Damage to operations equipment and assets
4. Safety equipment failure
5. Financial losses and fines



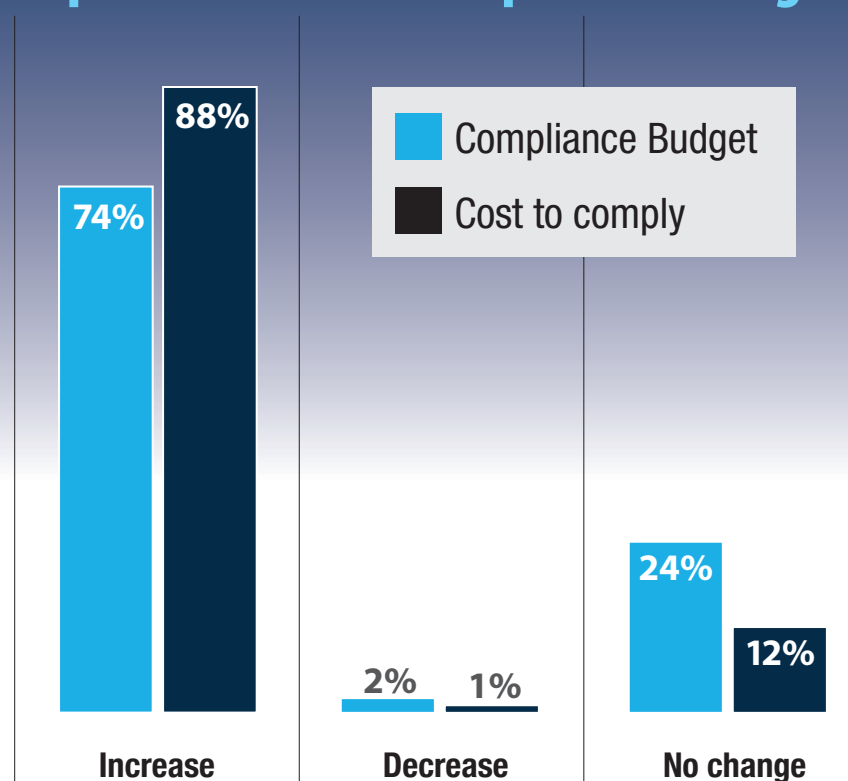
Combating Cybersecurity Challenges

Cybersecurity efforts tightly associated with compliance

71% agree that compliance efforts are the primary focus of cybersecurity for their utility

Although compliance efforts are currently the major driver behind utility cybersecurity, a majority of respondents indicated that cybersecurity considerations take precedence over compliance for real-time operations. Given this, and coupled with the fact that the majority of spending is compliance driven, compliance programs need to be optimized to reduce resource loading and spending to enable utilities to focus on securing their broader set of T&D operations and assets.

Expectations for compliance budgets and costs in the coming year



There is a significant difference between what utilities recognize as increasing compliance costs and what their budgets plan to support. This will drive them to seek cost-effective compliance solutions.

TOP 5 CHALLENGES for cybersecurity in real-time operations:

1. Compliance strategies and approaches
2. Sufficient budget
3. Technology maturity
4. Technology availability
5. Lack of expertise

RESEARCH BY:



IN PARTNERSHIP WITH:

