

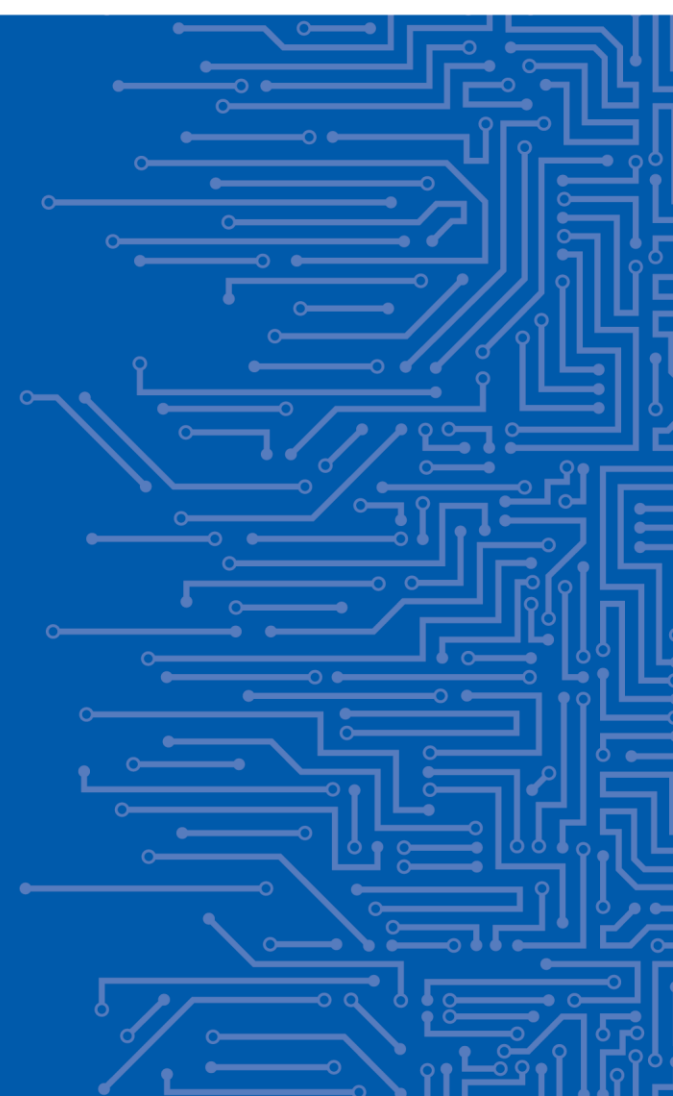


EUROPEAN UNION AGENCY
FOR CYBERSECURITY

NIS INVESTMENTS IN THE TRANSPORT SECTOR

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Cybersecurity Expert

2nd ERA – ENISA Conference
01 | 12 | 2022



2022 NIS INVESTMENTS REPORT



- 3rd annual report (>1000 OES/DSP from 27 EU MS) now provides **historical datasets**
- **Sectorial deep dives** (Energy & Health) – supported sectorial analyses for NIS CG work streams
- Focus on **operational aspects and OES capabilities**
- Aligned survey questionnaire to collect data for **CRA Impact Assessment**

251
OES/DSP
5 EU MS

2020

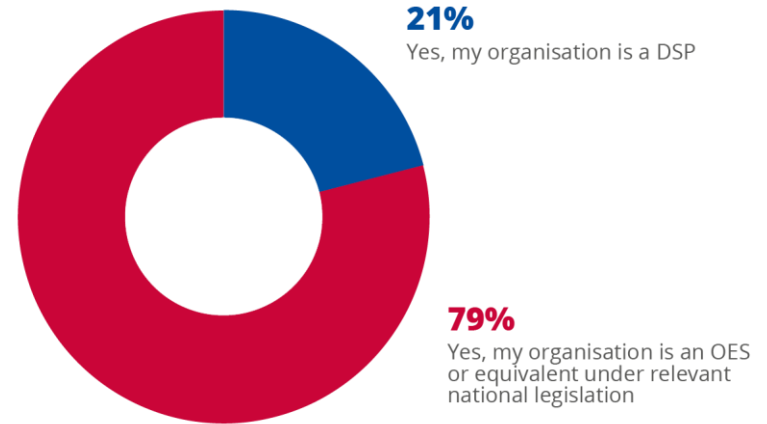
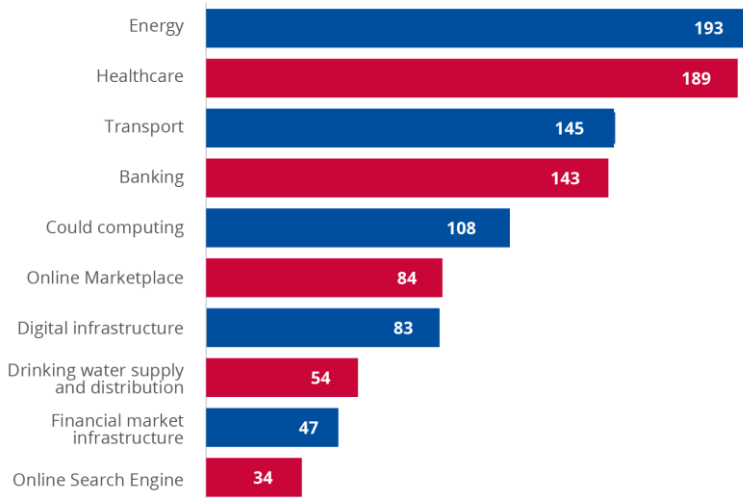
947
OES/DSP
27 EU MS

2021

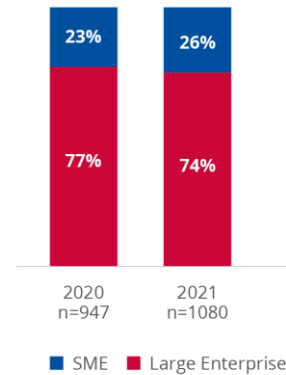
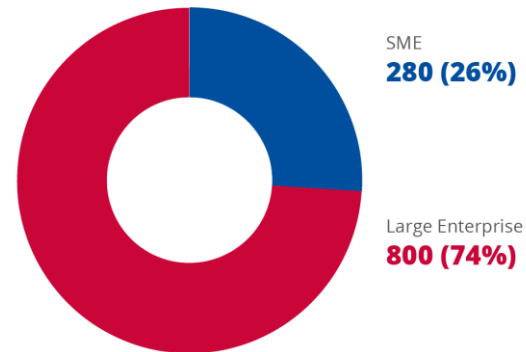
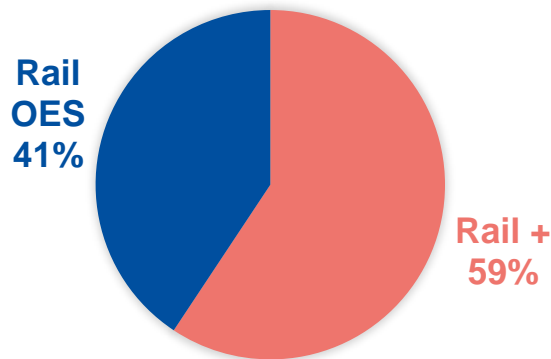
1080
OES/DSP
27 EU MS

2022

SURVEY DEMOGRAPHICS



RAIL SECTOR OES - 59



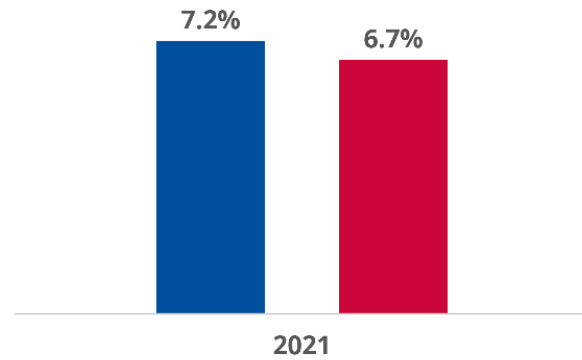


KEY FINDINGS

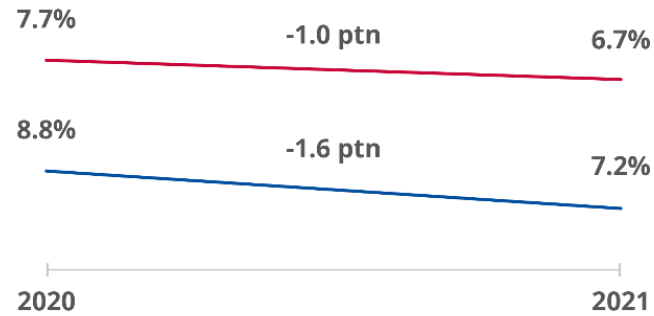
- The median percentage of IT budgets spent on IS is 6.7 %, **1 percentage point lower compared to last year's findings.**
- The NIS Directive and other regulatory obligations, as well as the threat landscape are the main factors influencing IS budgets.
- Large operators invest significantly more on CTI compared to smaller ones with the median spend on **CTI across OES/DSPs being EUR 50 000**. Internal SOC capabilities seem to be very closely correlated with CTI spending -> **need to facilitate access to CTI for smaller operators.**
- The estimated direct cost of a major security incident is EUR 200 000 on median, **twice as large as last year**. Health / Banking again top the list.
- 37% of the OESs and DSPs in the EU **do not operate a dedicated SOC.**
- **30% of OES/DSPs possessed cyber insurance** in 2021, a decrease of 13% compared to 2020, with only 5% of SMEs subscribing to cyber insurance.
- **86% of OES/DSPs have implemented third-party risks management** though only 47% have a dedicated TRM budget and only 24% have a dedicated TRM role.

CYBERSECURITY BUDGETS

IS vs. IT – All Sectors



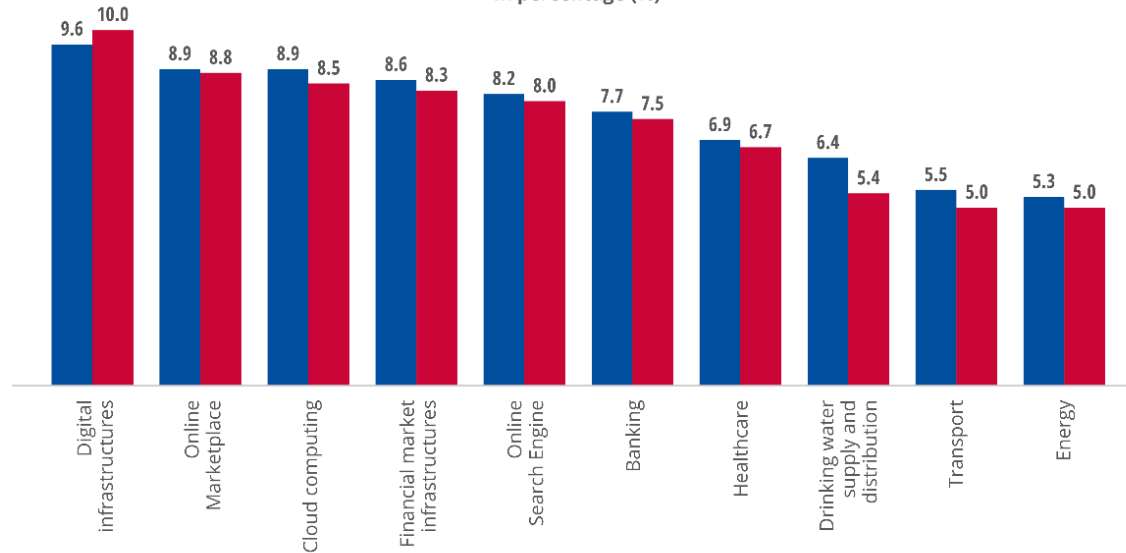
Historical Data – All Sectors



■ Average

■ Median

In percentage (%)



■ Average

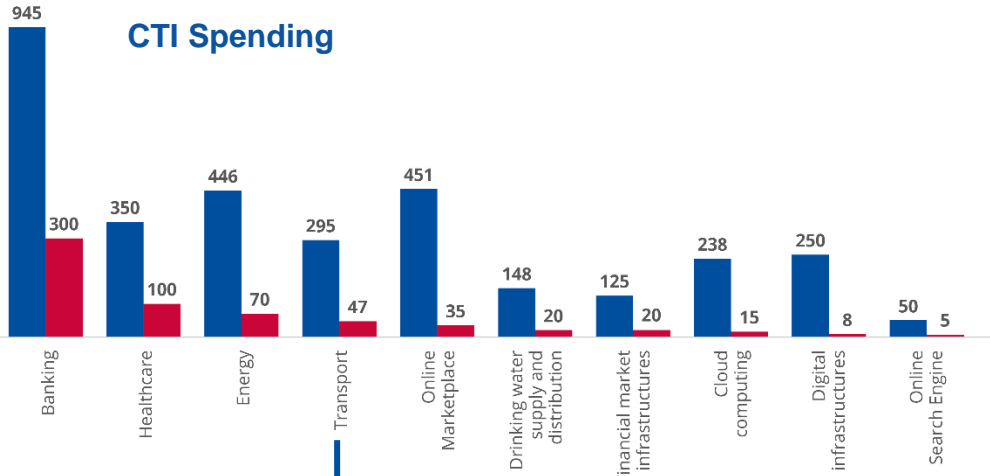
■ Median

n=1070

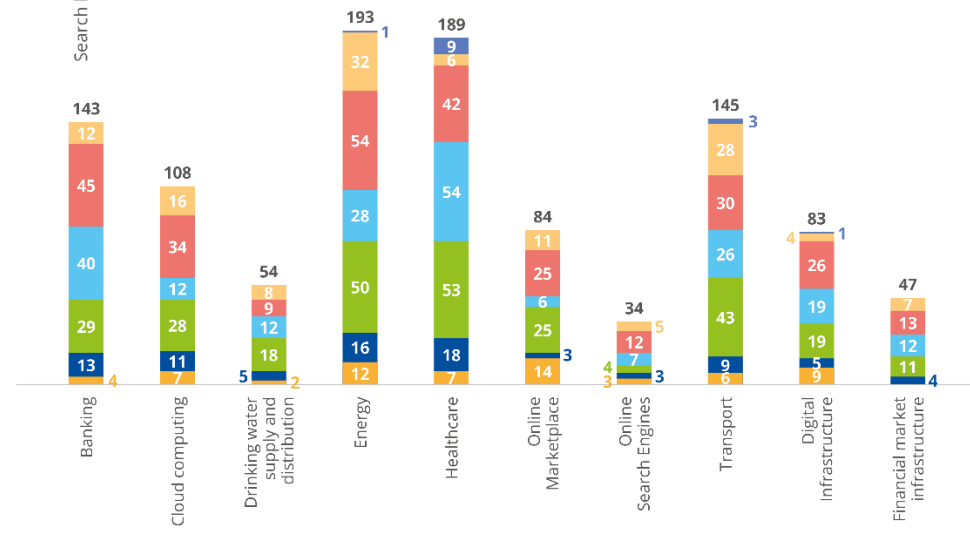
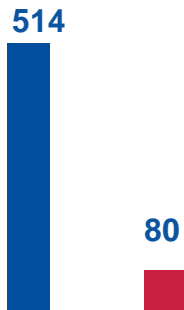
CYBERSECURITY BUDGETS

In Thousands of Euro (€)

CTI Spending

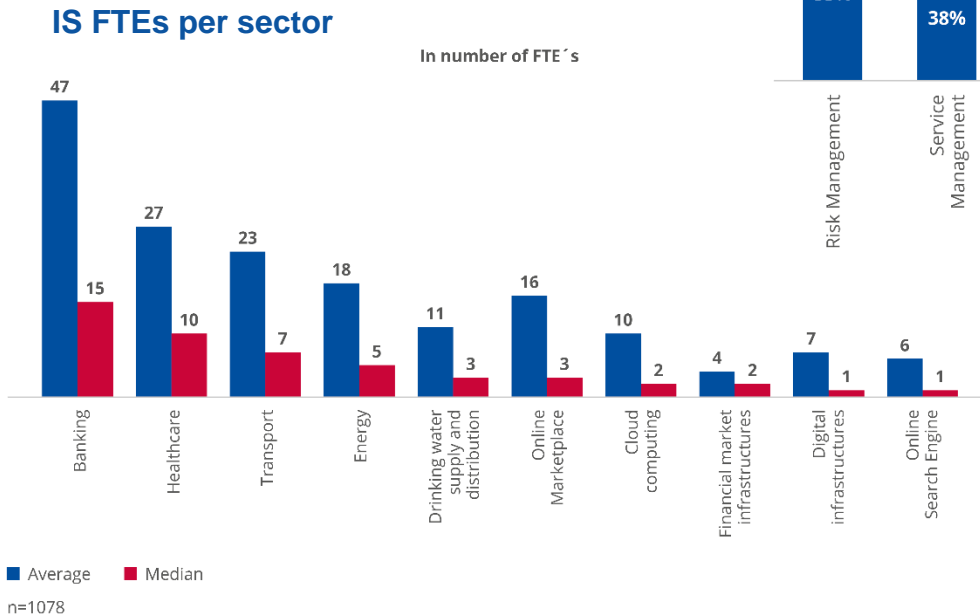
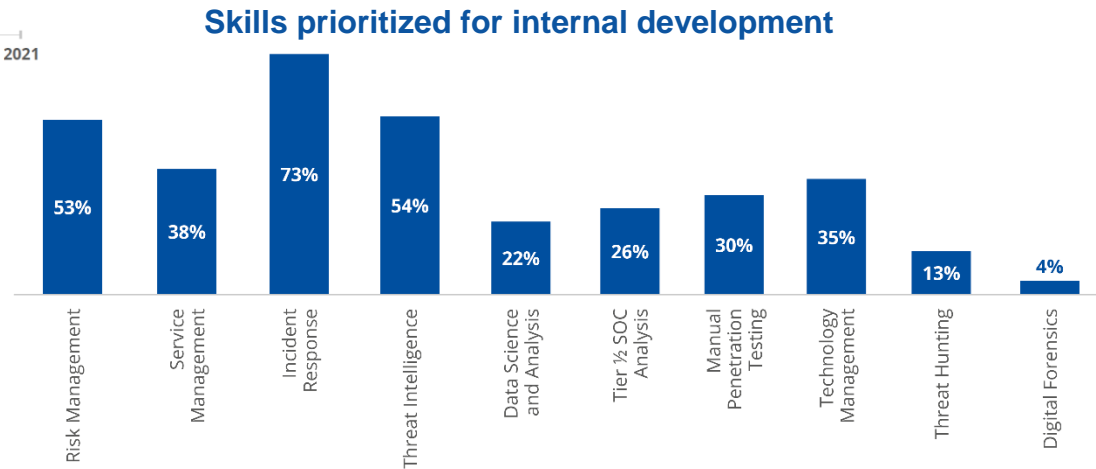
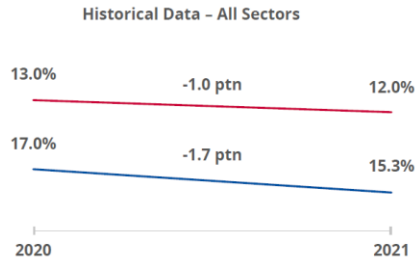
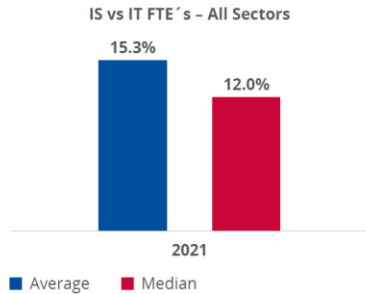


Rail

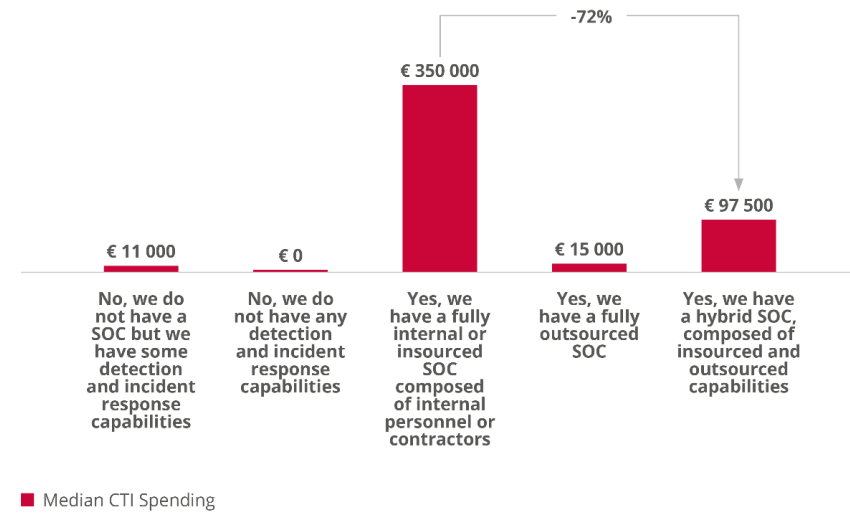
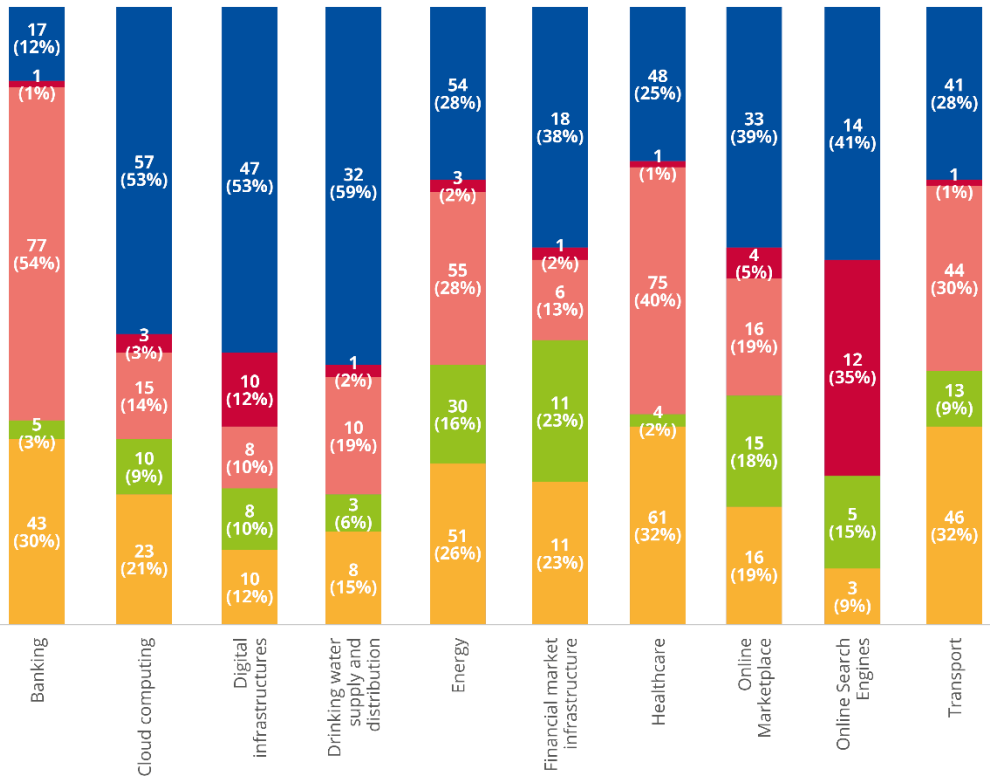


■ COVID-19
 ■ Geopolitical situation
 ■ Threat landscape
■ Regulatory environment (excluding the NIS Directive)
 ■ NIS Directive
■ Suffered from a data breach or cyber incident
 ■ Competitive landscape

CYBERSECURITY RESOURCES

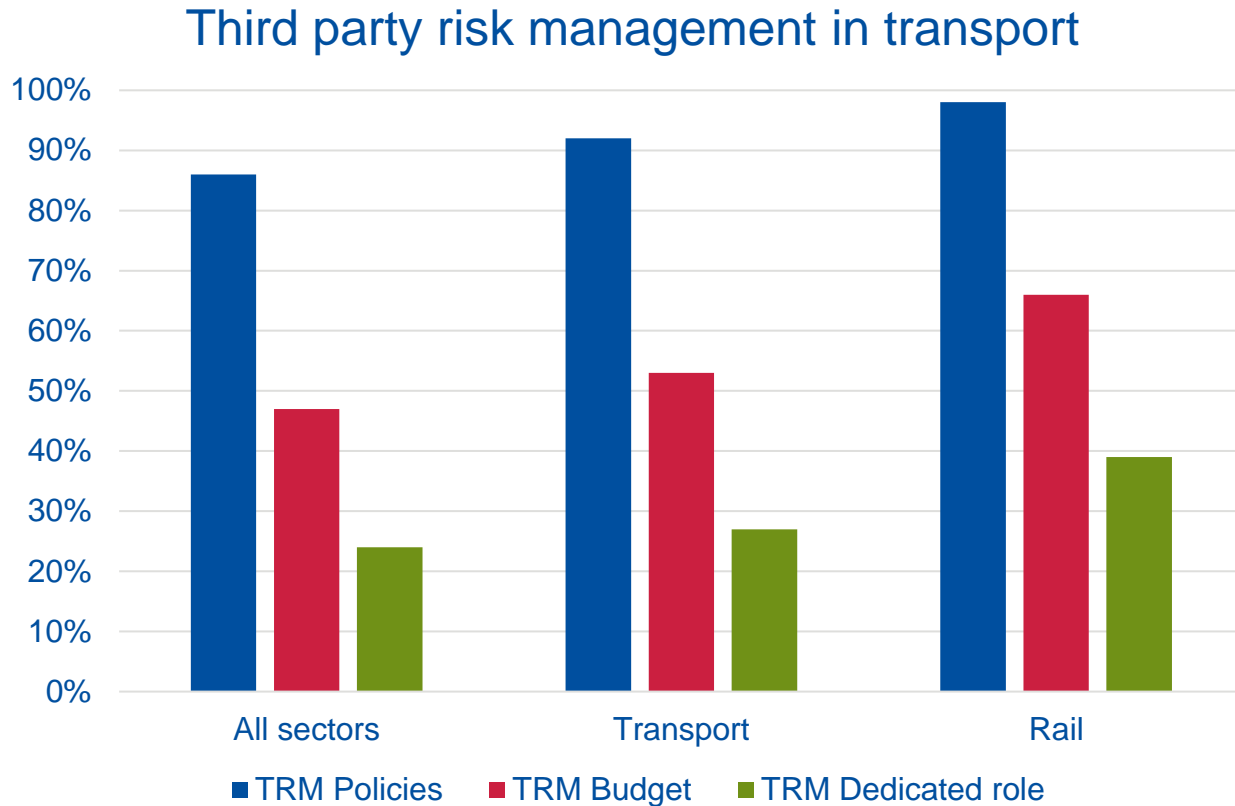


CYBERSECURITY CAPABILITIES



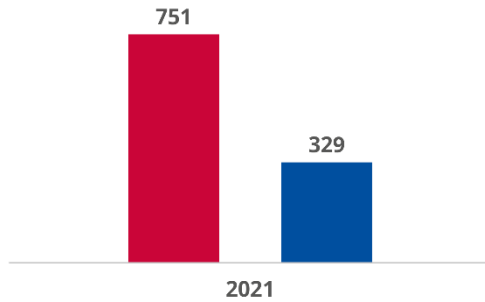
- No, we do not have a SOC but we have some detection and incident response capabilities
- No, we do not have any detection and incident response capabilities
- Yes, we have a fully internal or insourced SOC composed of internal personnel or contractors
- Yes, we have a fully outsourced SOC
- Yes, we have a hybrid SOC, composed of insourced and outsourced capabilities

THIRD PARTY RISK MANAGEMENT

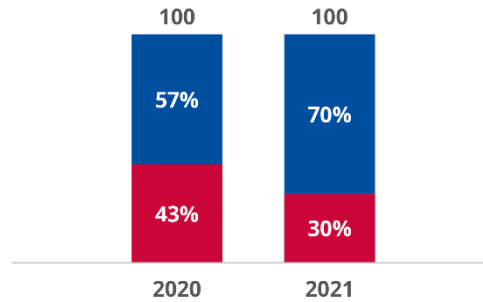


CYBER INSURANCE

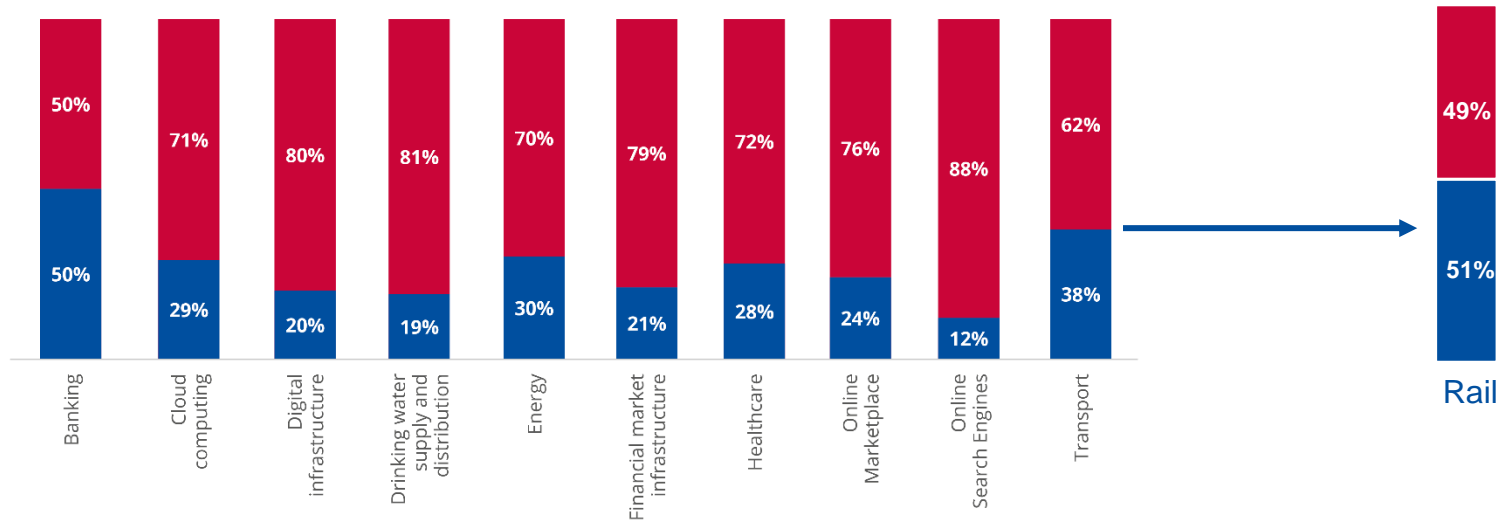
Cyber Insurance - All Industries



Historical Data - Cyber Insurance

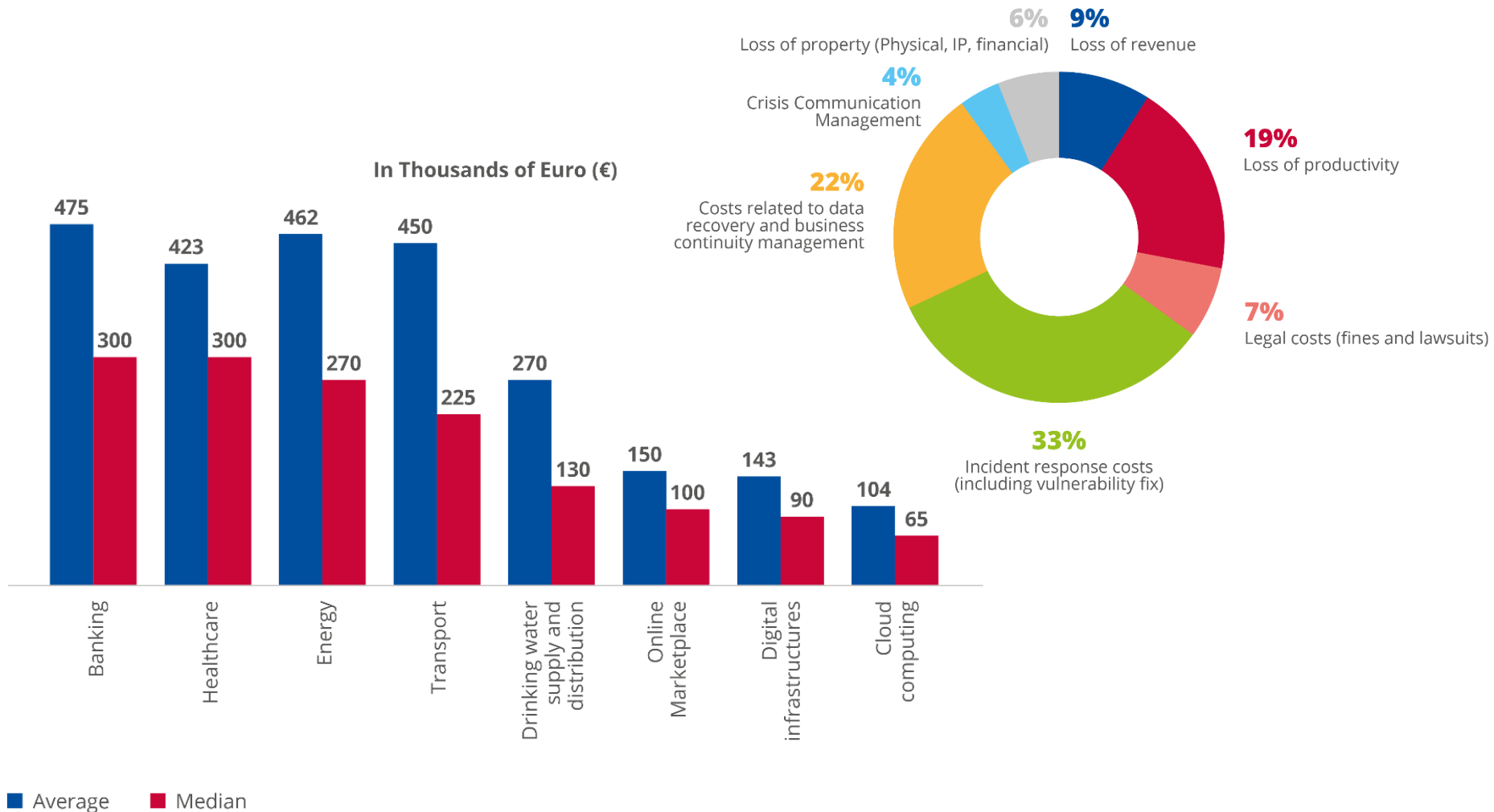


■ No ■ Yes



■ Yes ■ No

COST OF CYBERSECURITY INCIDENTS



THANK YOU FOR YOUR ATTENTION

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