Corporate Security 2024

Dr Ralf Wintergerst
President, Bitkom

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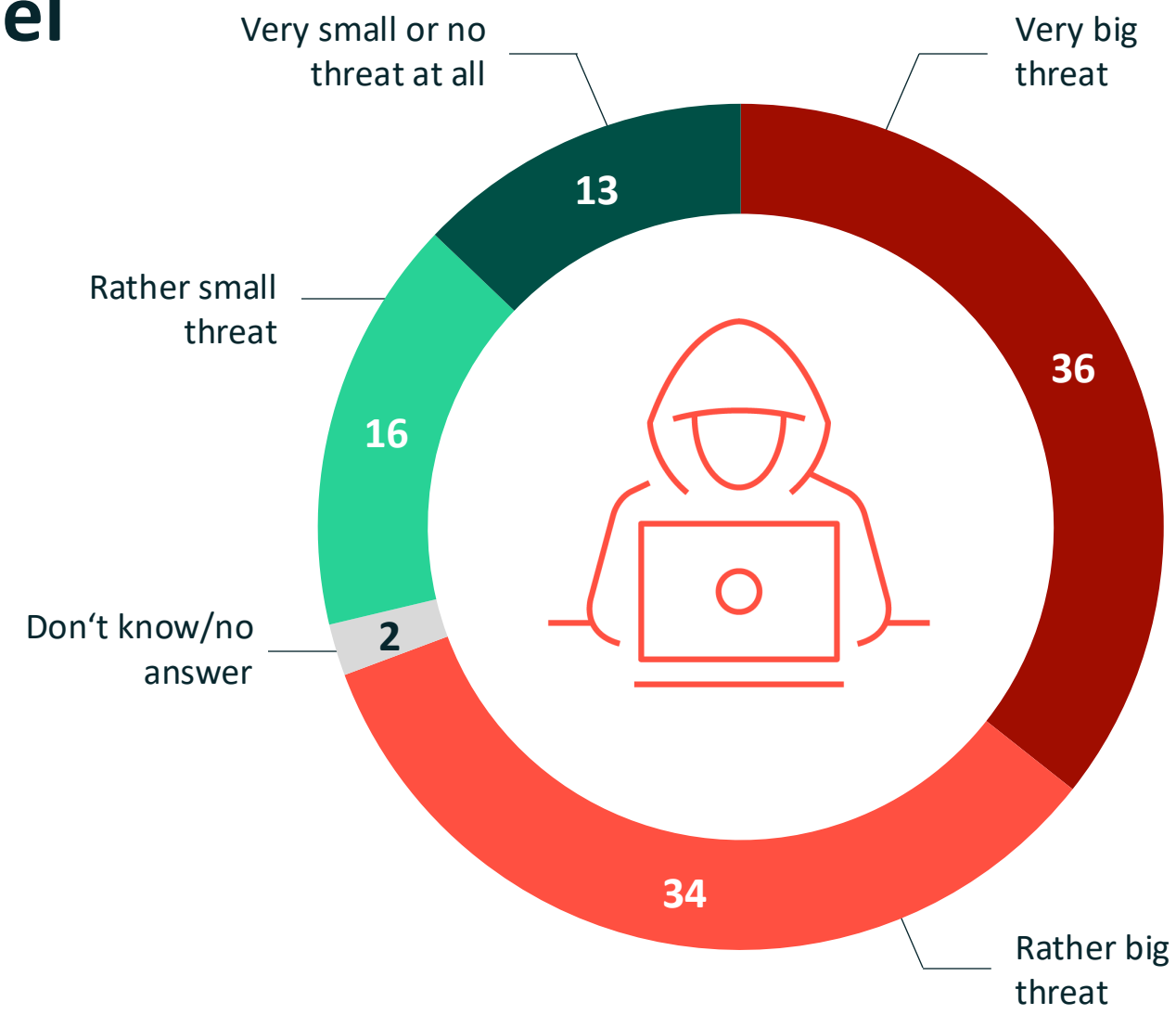
7 out of 10 companies feel strongly threatened by analogue and digital attacks

To what extent do you see analogue and digital attacks such as data theft, industrial espionage and sabotage as a threat for your company?



in per cent

Base: All companies (n=1,003) | Deviations from 100 per cent are due to rounding | Source: Bitkom Research 2024

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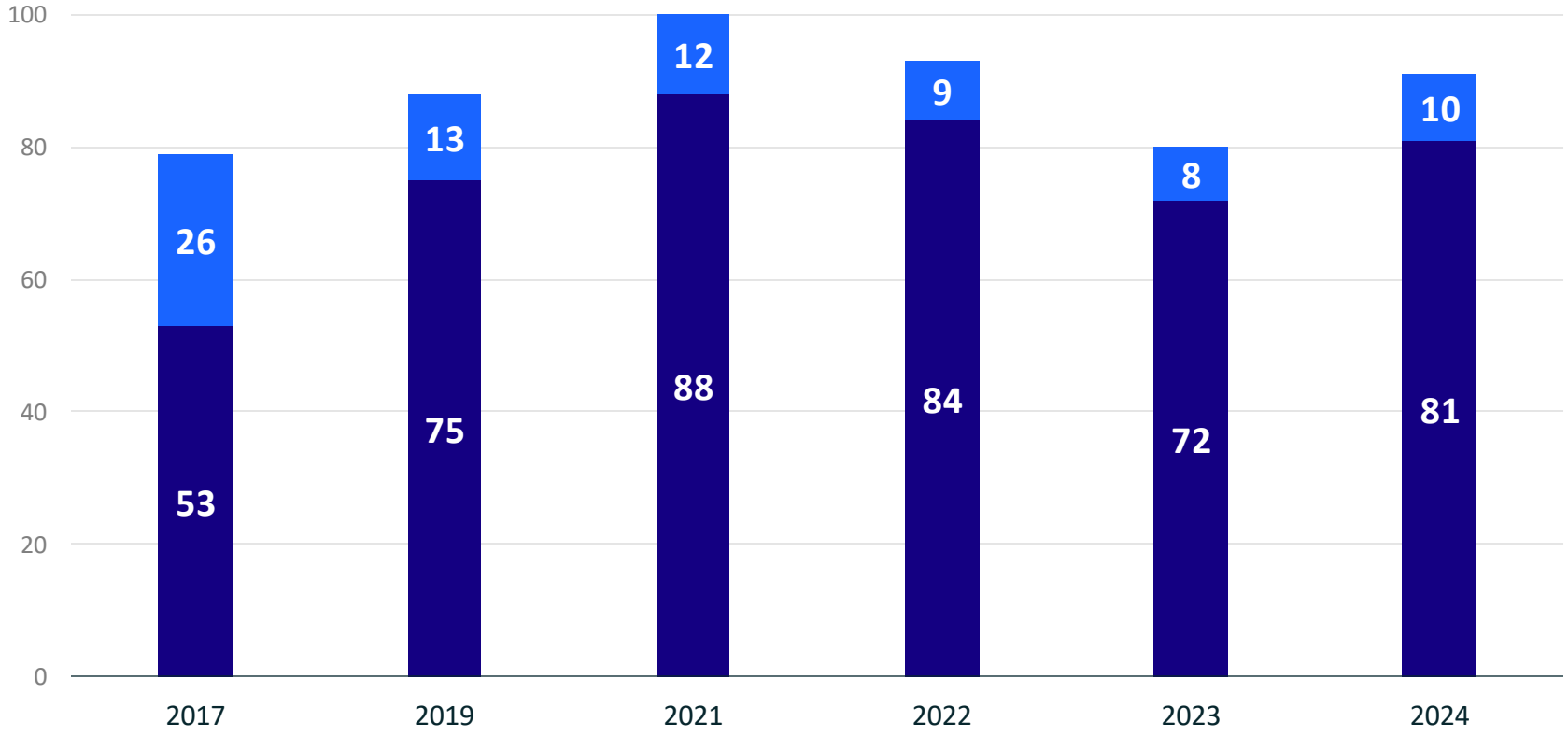
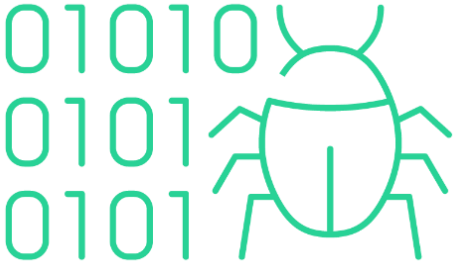
More companies affected by attacks

Has your company been affected by theft, industrial espionage or sabotage within the last 12 months?





Presumably affected

Affected

in per cent

Base: All companies (n=1,003) | * 2017 & 2019 »within the last 24 months« | Source: Bitkom Research 2024

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Damage rises to 266.6 billion euros

What damage has your company suffered in connection with theft, industrial espionage or sabotage?

Damage due to…	Loss amounts in billion euros (2024)	Loss amounts in billion euros (2023)	Loss amounts in billion euros (2022)
Failure, theft or damage to information and production systems or operational processes	54.5	35.0	41.5
Cost of legal disputes	53.1	29.8	16.2
Loss of revenue due to counterfeit products or plagiarism	39.2	15.3	21.1
Cost of investigations and replacement measures	32.2	25.2	10.1
Data protection measures, e.g. by authorities	27.2	12.4	18.3
Damage to image with customers or suppliers, negative media coverage	20.2	35.3	23.6
Patent infringements, even before filing	14.8	10.4	18.8
Blackmail with stolen data	13.4	16.1	10.7
Loss of revenue due to loss of competitive advantage	11.2	21.5	41.5
Cash outflow due to attempted fraud	0.8	3.9	-
Other loss/damages	0	1,1	0.9
Total loss per year	**266.6**	**205.9**	**202.7**

Base: All companies (n=1,003) | Multiple answers possible | Due to rounding, the sum of the individual losses may deviate from the total loss | Source: Bitkom Research 2024

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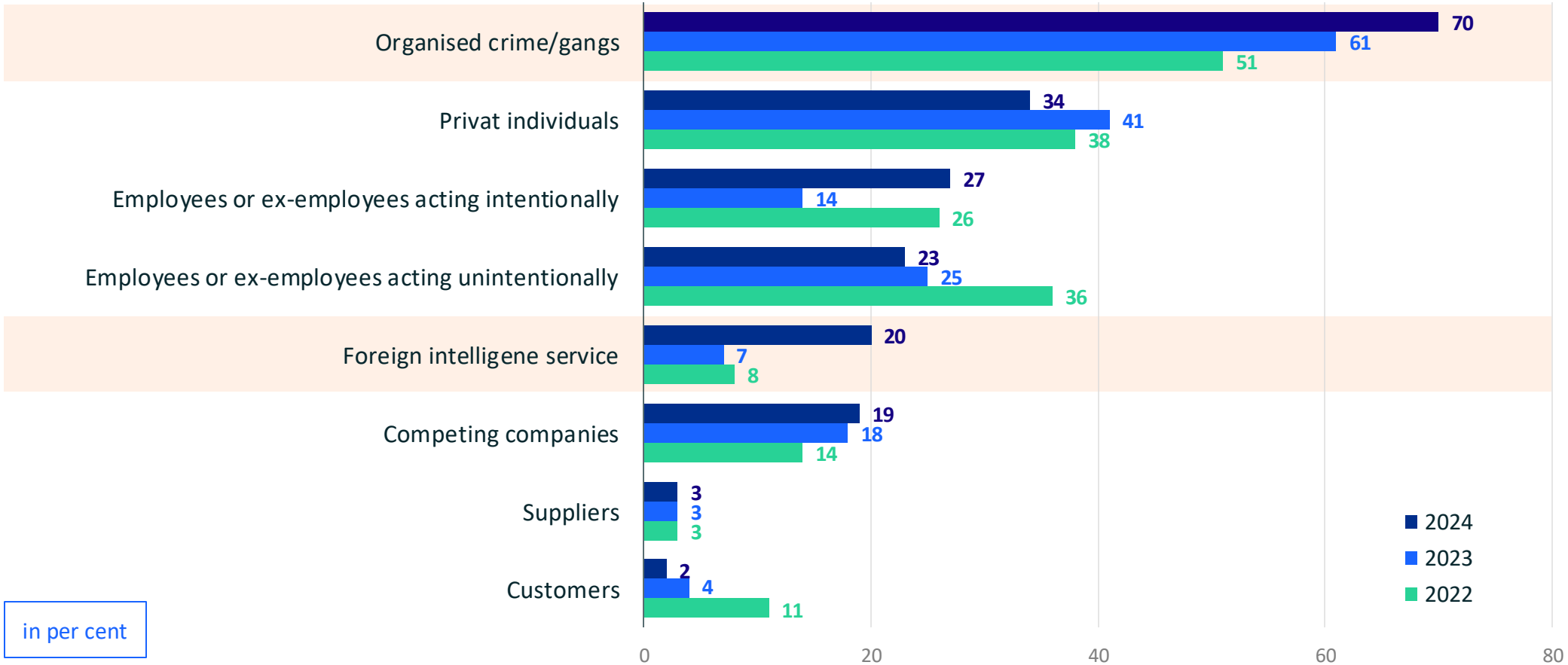
Attacks by organised crime and secret services

Who were the perpetrators of the offences in the last 12 months?



Base: Companies that have been affected by data theft, industrial espionage or sabotage in the last 12 months (n=812) | Multiple answers possible |
Source: Bitkom Research 2024

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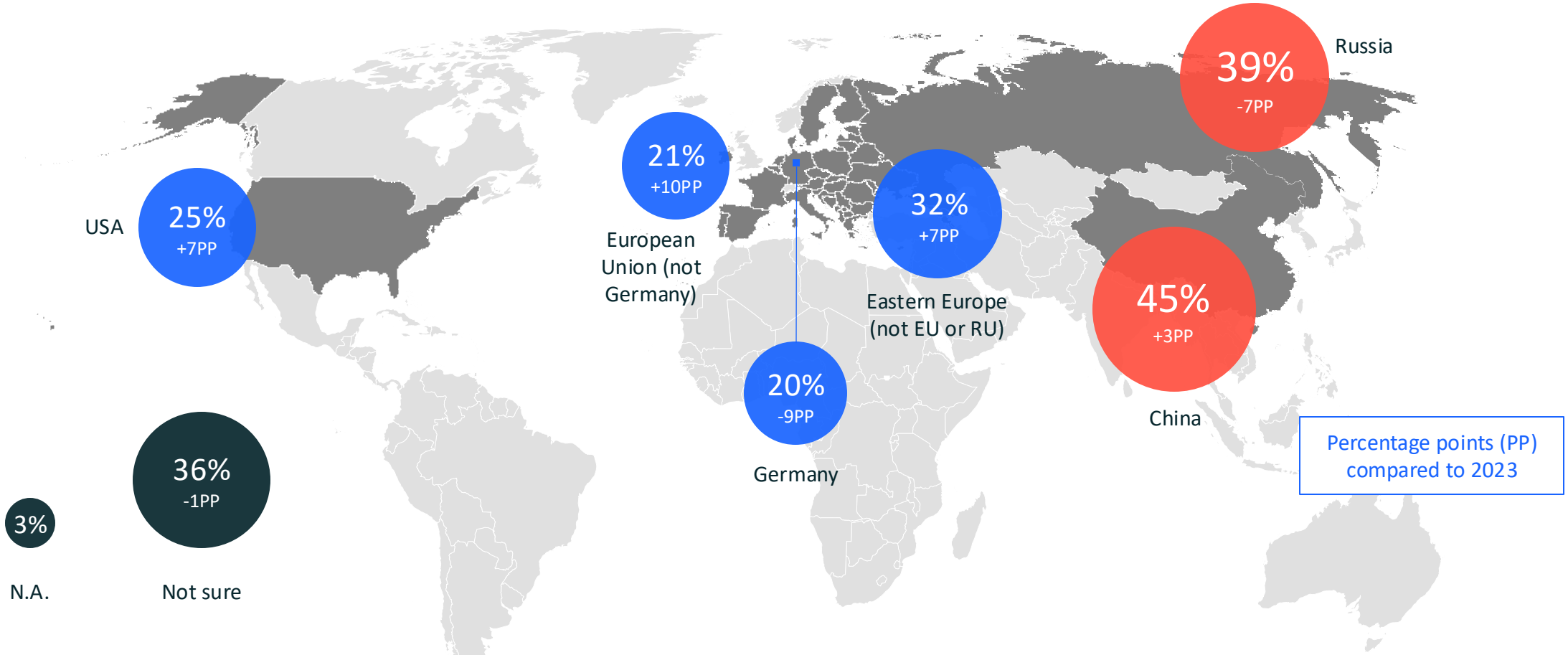
Attacks mainly come from China and Russia

Were you able to determine from where or from which region these actions were carried out?



Base: Companies that have been affected by data theft, industrial espionage or sabotage in the last 12 months (n=812) | Multiple answers possible | Source: Bitkom Research 2024

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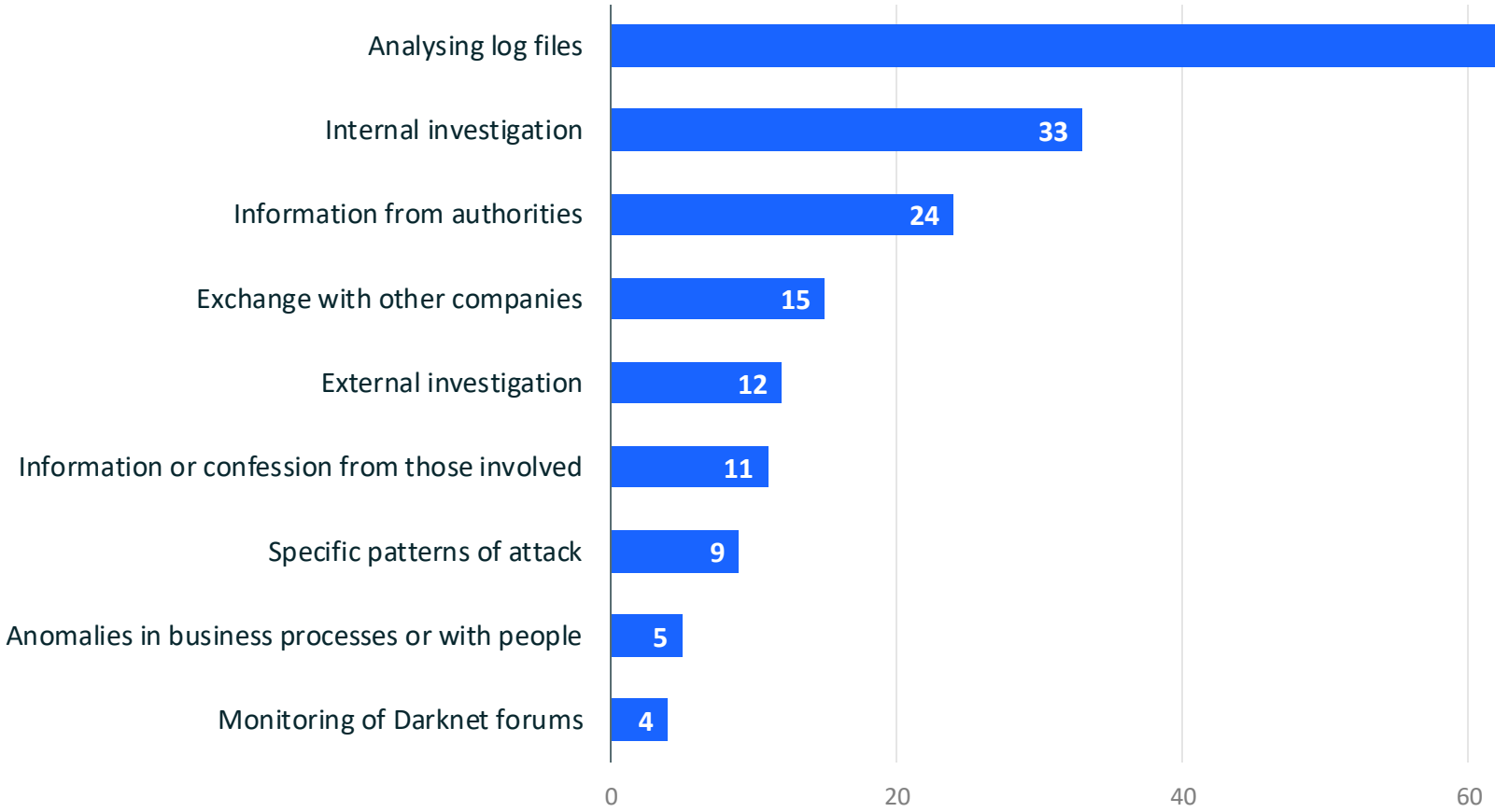
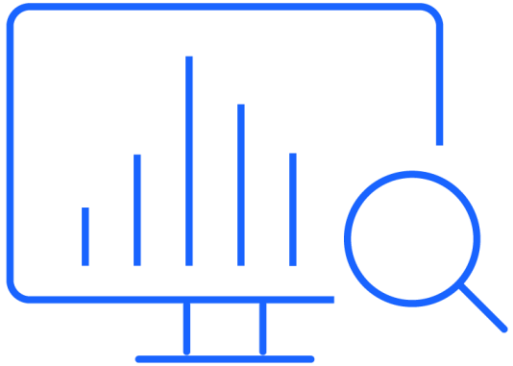
How offenses are uncovered

What was the basis for your findings?



in per cent



Base:. Companies that have been affected by data theft, industrial espionage or sabotage in the last 12 months and know about the origin, group of perpetrators or motives (n=783) | Multiple answers possible | Source: Bitkom Research 2024

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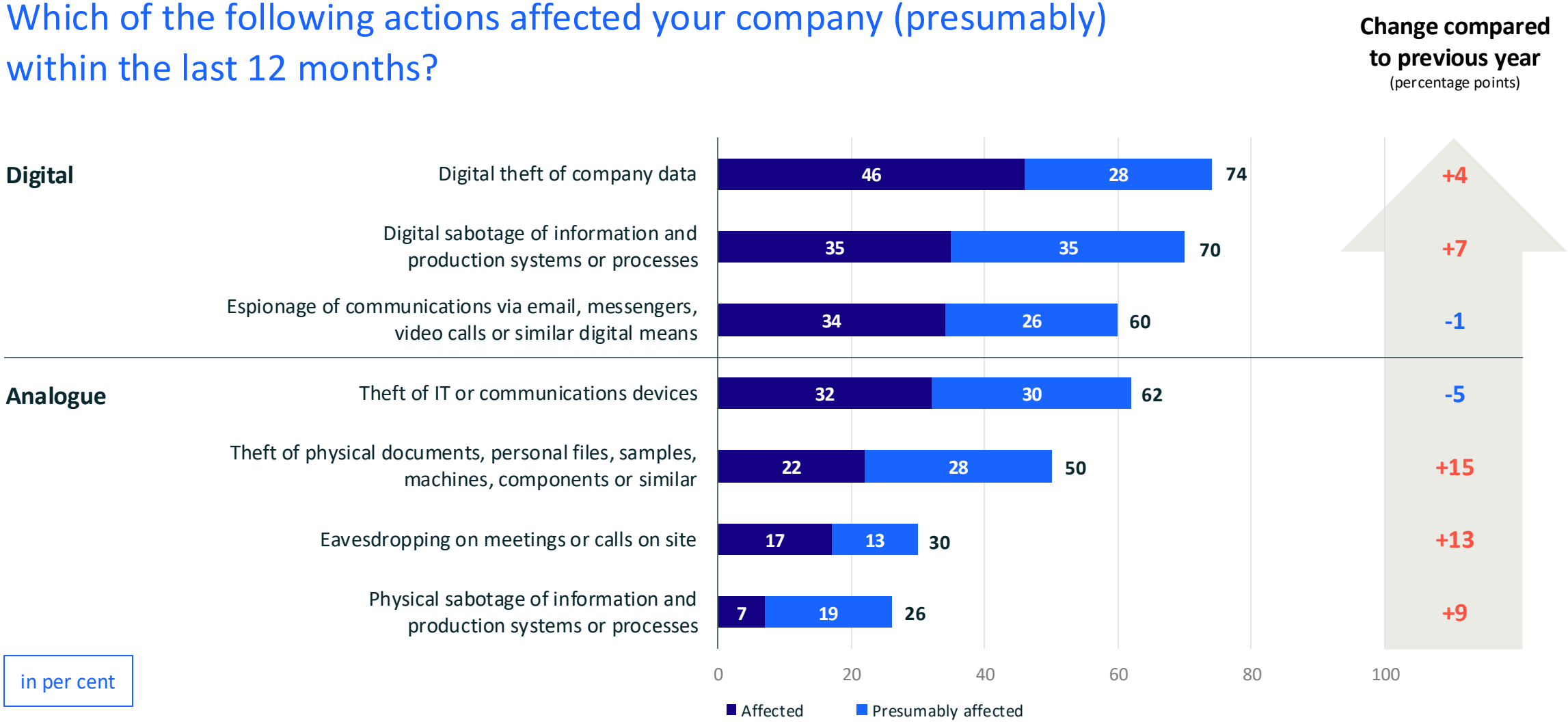
Attacks are mostly digital, analogue attacks are on the rise

Which of the following actions affected your company (presumably) within the last 12 months?



in per cent

Base: All companies (n=1,003) | Multiple answers possible | Source: Bitkom Research 2024

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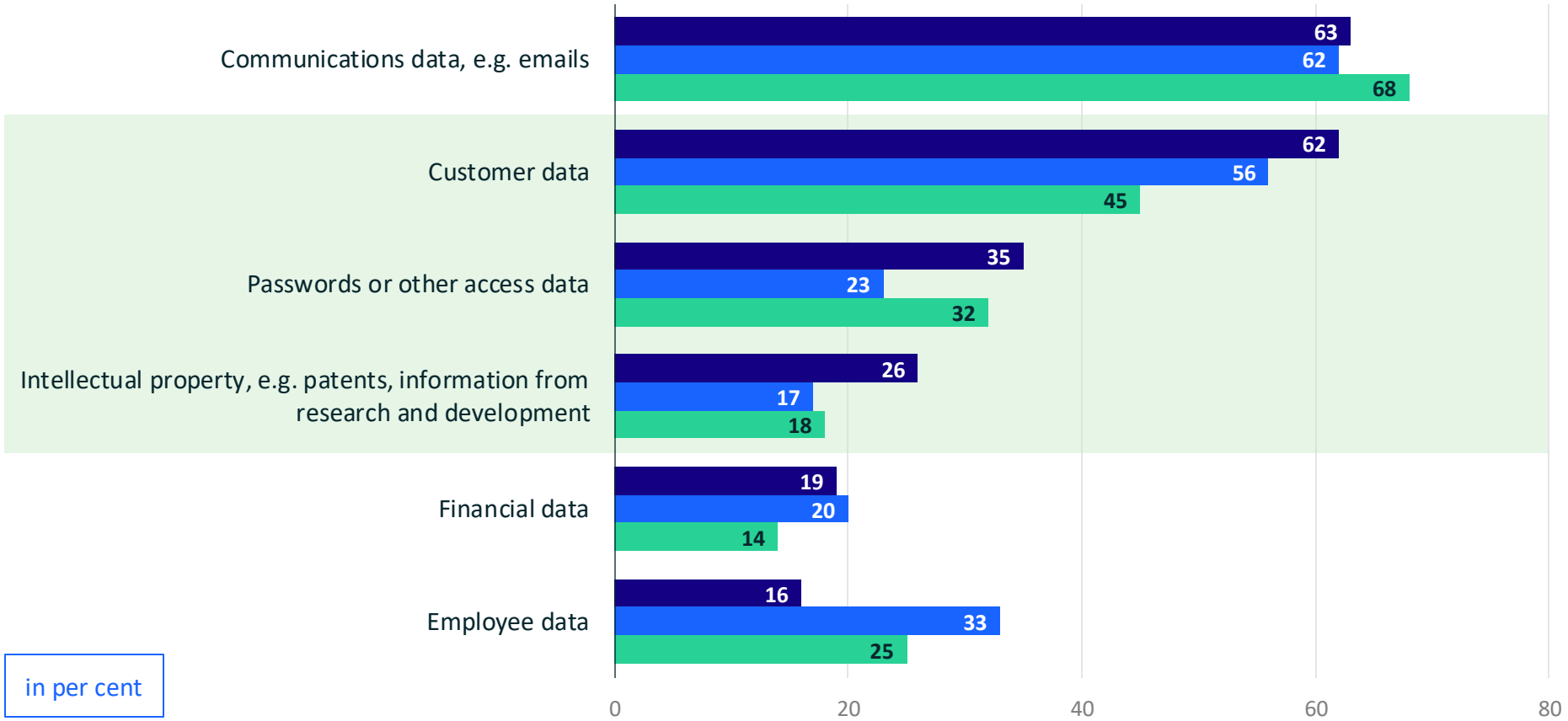
Data theft: focus on customers, passwords and patents

Which of the following types of digital data were stolen from your organisation?



Base: Companies affected by digital data theft in the last 12 months (n=460) | Multiple answers possible | Source: Bitkom Research 2024

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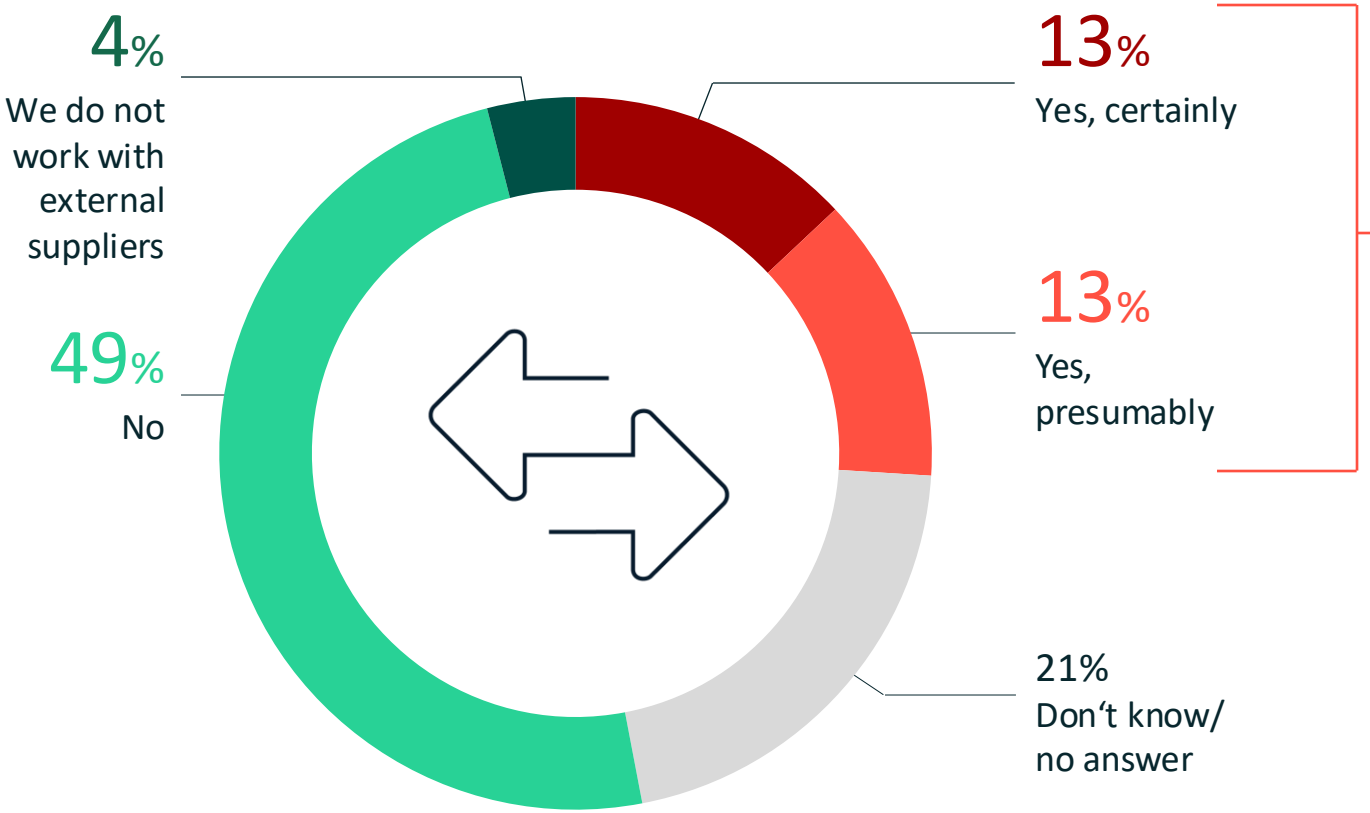
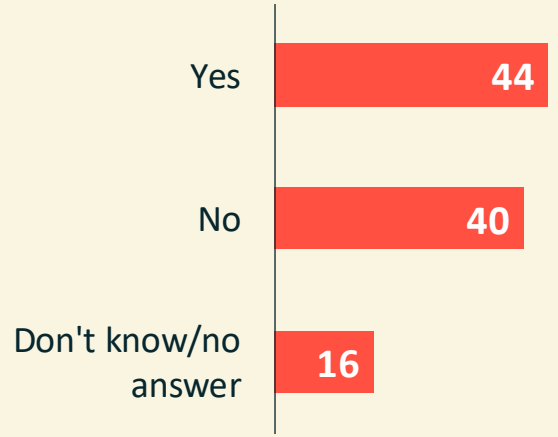
Suppliers as a gateway for attacks

Have any of your company's suppliers been affected by data theft, industrial espionage or sabotage in the last 12 months?



Did this have consequences for your company, e.g. production losses, delivery bottlenecks, reputational damage?



Base, left: All companies (n=1,003) | Base, right: Companies where suppliers were affected or presumably affected (n=264) |
Source: Bitkom Research 2024

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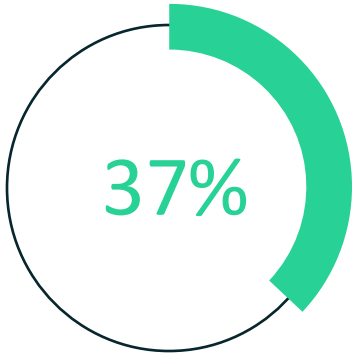
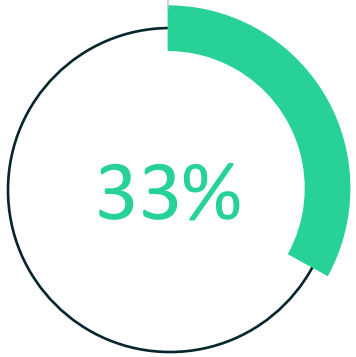
The supply chain is rarely in focus

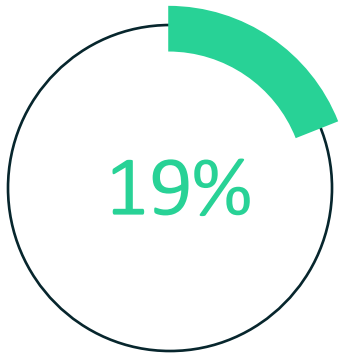
Which statements apply to your company with regard to the supply chain?



We have **an emergency plan** for how we respond to security incidents in our supply chain.

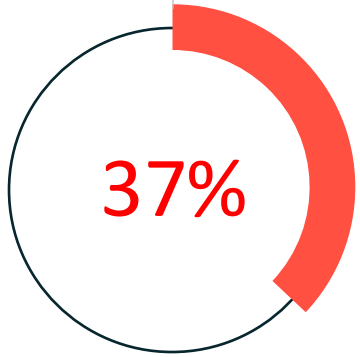
We are in **close contact with our suppliers** to minimize the risk of attacks within the supply chain.

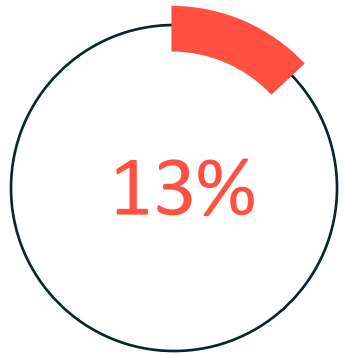




We carry out **regular security assessments** of suppliers to minimize the risk of attacks.

Our company **lacks awareness** of the risks of attacks within the supply chain.





We are concerned that **suppliers do not adhere to the same security standards** as we do and thus become a gateway for attacks.

Base: Companies that work with suppliers (n=961) | Source: Bitkom Research 2024

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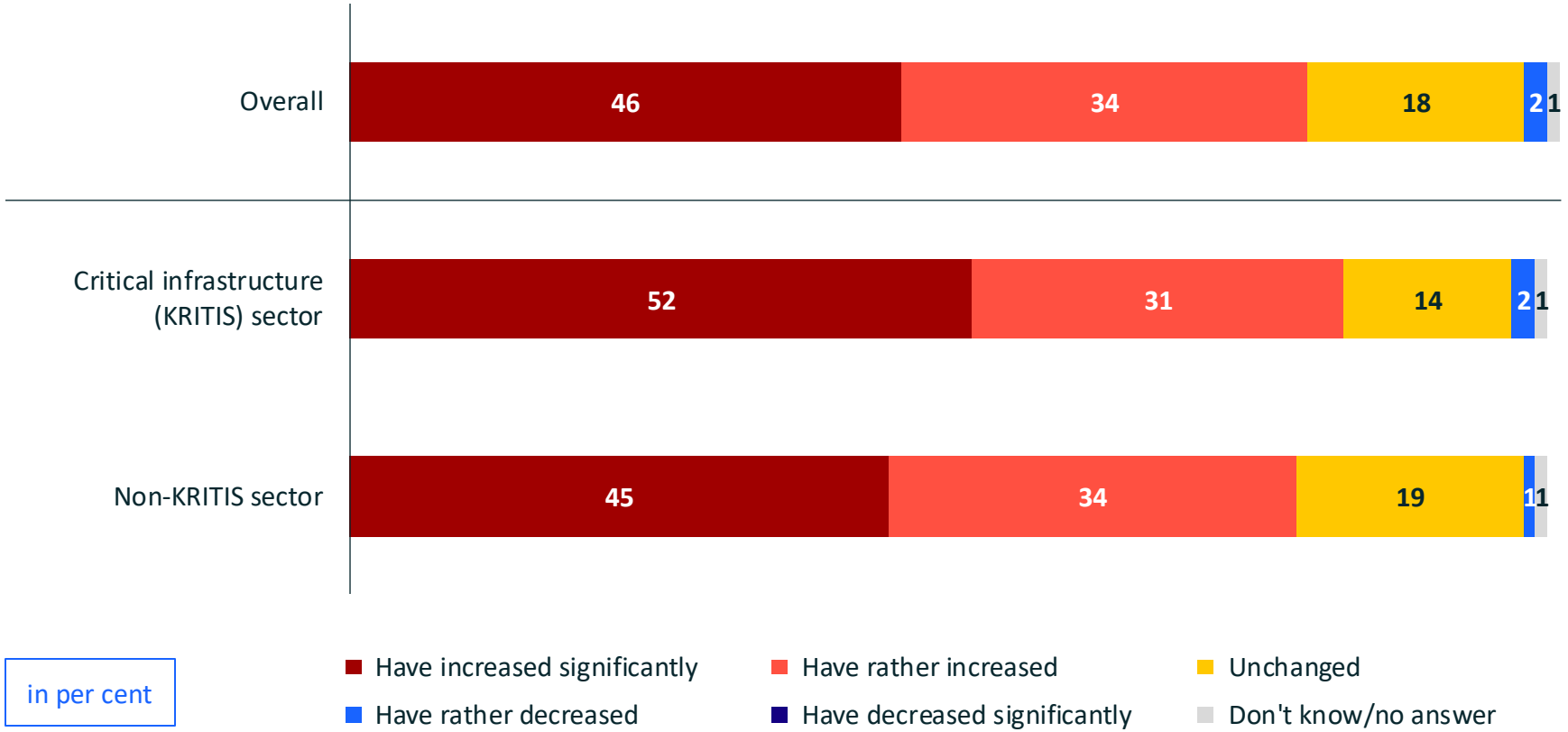
Cyber attacks on companies are still on the rise

How has the number of cyberattacks on your company developed over the past 12 months?



Base: All companies (n=1,003) | Deviations from 100 per cent are due to rounding | Source: Bitkom Research 2024

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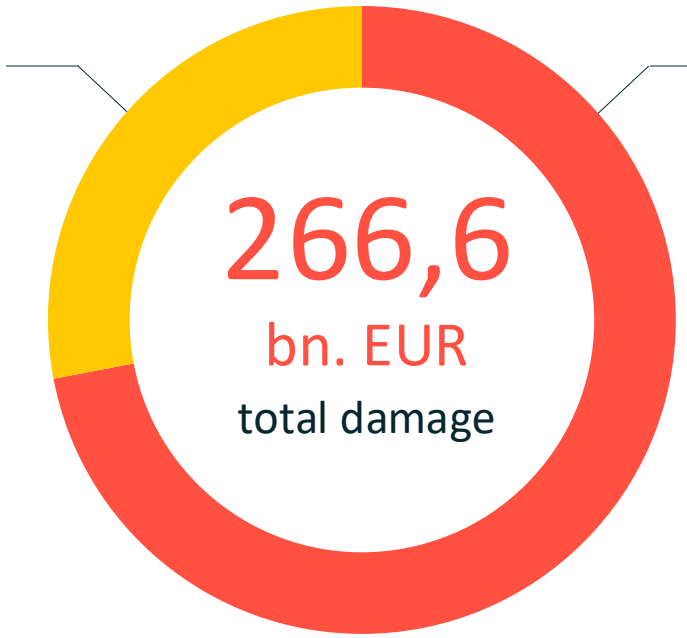
Cyber attacks cause two thirds of the damage

What percentage of the total loss incurred can be attributed to cyberattacks?

33%

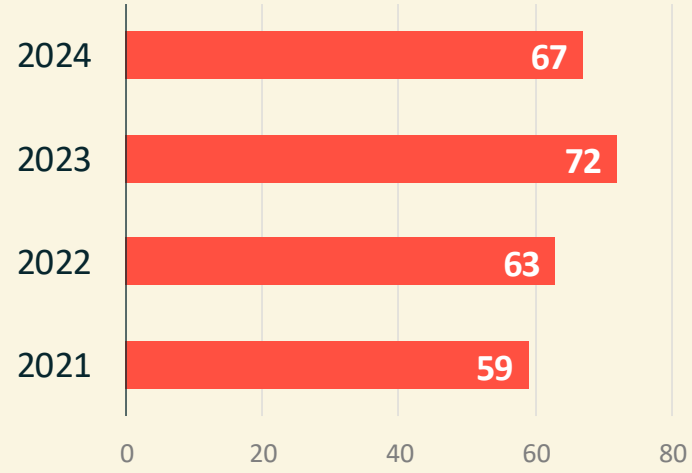
88.0 bn. EUR
Other damages
(2023: 57.7 bn. EUR)



67%

178.6 bn. EUR
Cyber attacks
(2023: 148.2 bn. EUR)

Share of cyberattacks in total losses 2021-2024 (in per cent)



Base: Companies that have been affected by data theft, industrial espionage or sabotage in the last 12 months (n=812) | Source: Bitkom Research 2024

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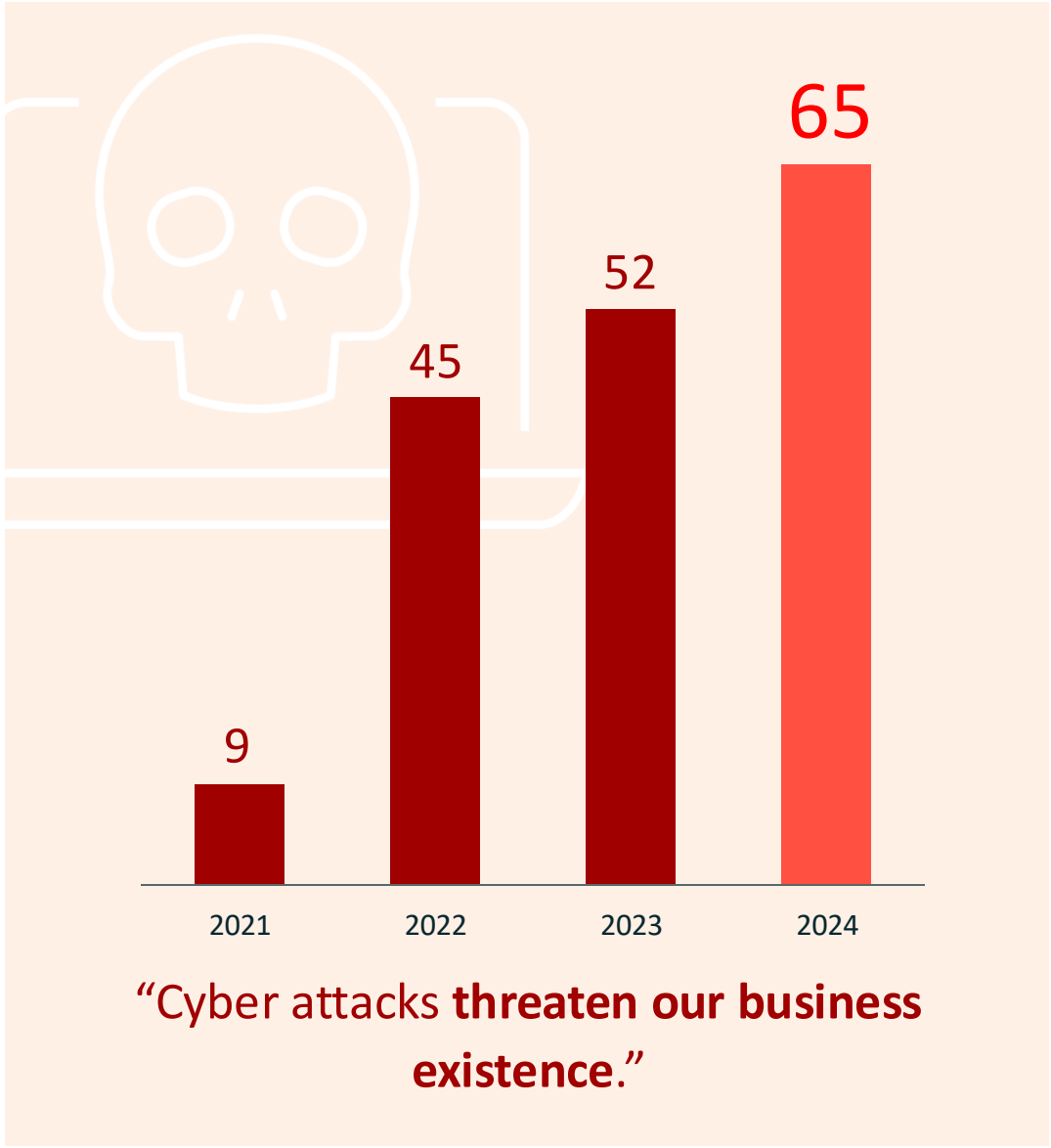
Two thirds of companies see their existence threatened by cyberattacks

To what extent do the following statements apply?

53%

“Our company is very well **prepared for cyber attacks**.”

in per cent



“Cyber attacks **threaten our business existence**.”

Base: All companies (n=1,003) | Percentages for "Completely agree" & "Rather agree“ | Source: Bitkom Research 2024

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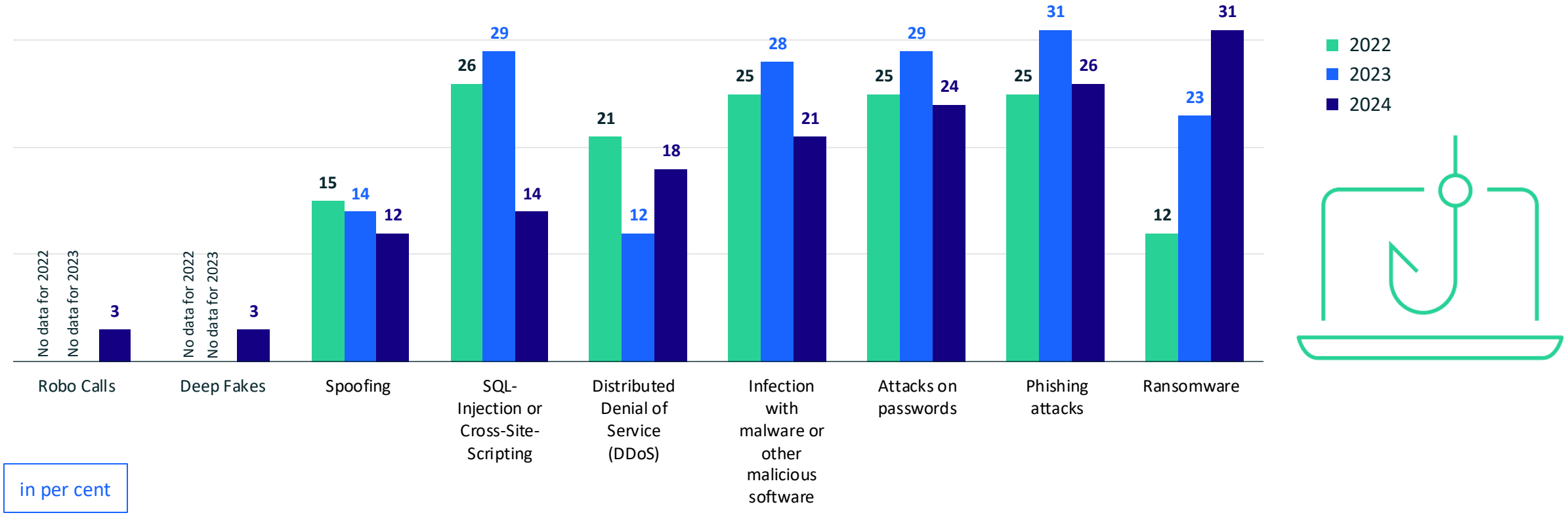
Ransomware causes damage more often

Which of the following types of cyber attacks have caused damage to your company in the last 12 months?



in per cent

Base: All companies (n=1,003) | Multiple answers possible | Source: Bitkom Research 2024

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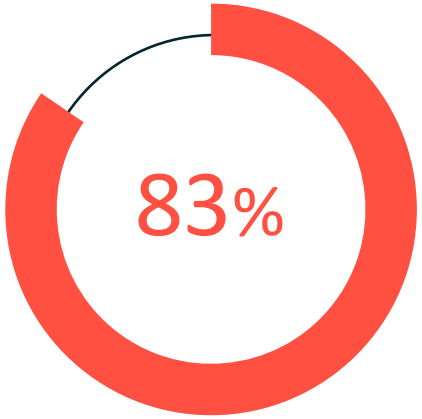
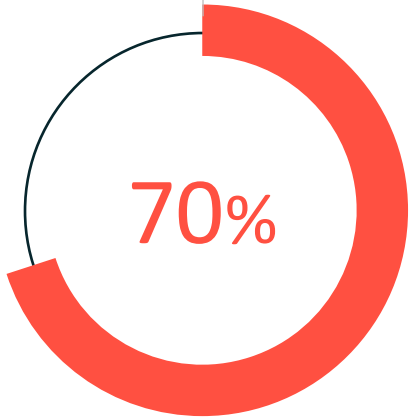
AI is considered a threat to IT security – but also an opportunity

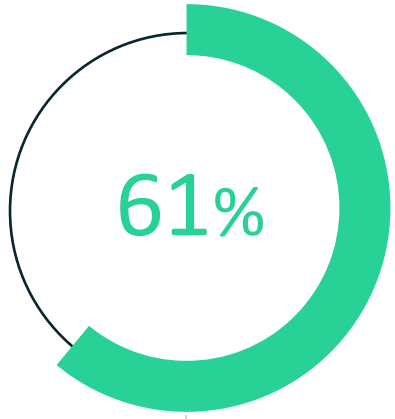
To what extent do the following statements apply?



Artificial intelligence **exacerbates the threat** to the economy.

Artificial intelligence **facilitates cyber attacks.**





The use of Artificial Intelligence can significantly **improve IT security.**

Base: All companies (n=1,003) | Percentages for "Completely agree" & "Rather agree“ | Source: Bitkom Research 2024

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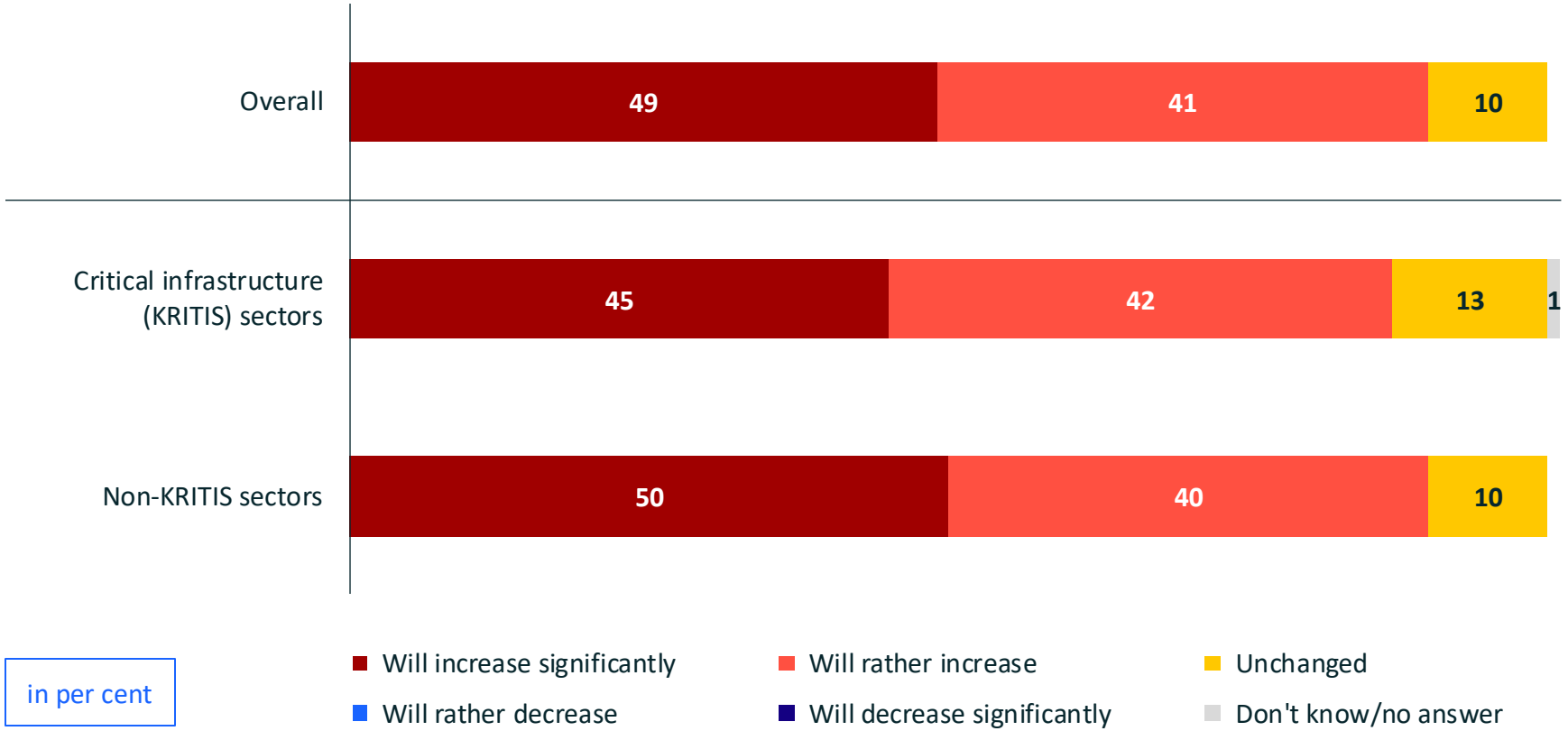
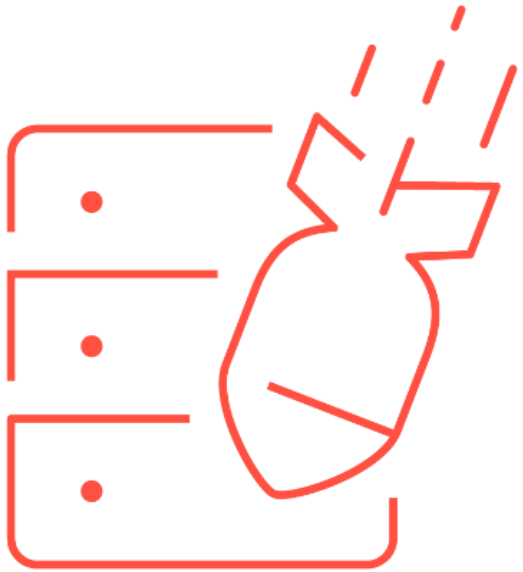
Companies fear massive increase in cyberattacks

What is your expectancy for the number of cyberattacks on your company in the next 12 months compared to the last 12 months?



in per cent



Base: All companies (n=1,003) | Deviations from 100 per cent are due to rounding | Source: Bitkom Research 2024

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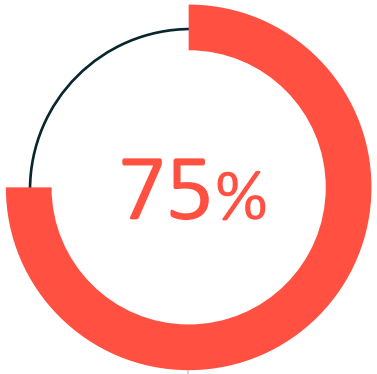
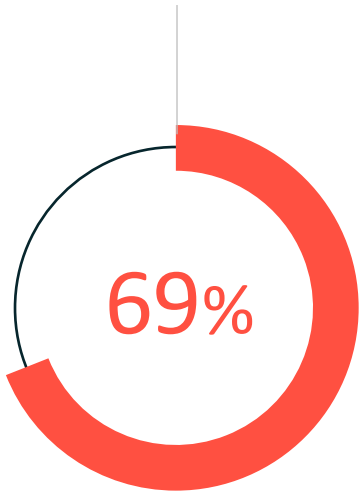
Global situation: majority feels threatened, and acts

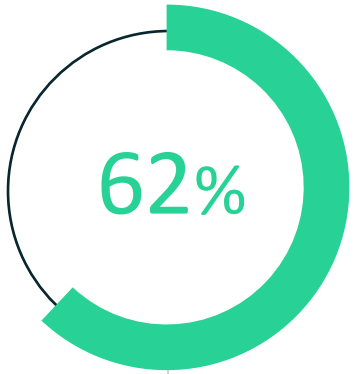
To what extent do the following statements apply?



The **security authorities are powerless** against cyberattacks from abroad.

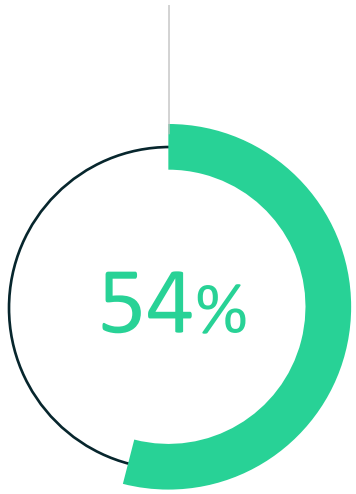
As a result of the numerous **wars and conflicts**, the threat to our company from **cyber attacks** has increased.





We have **tightened our IT security measures** due to the numerous wars and conflicts.

We have taken measures to **protect ourselves against physical attacks** on the IT infrastructure.



Base: All companies (n=1,003) | Percentages for "Completely agree" & "Rather agree" | Source: Bitkom Research 2024

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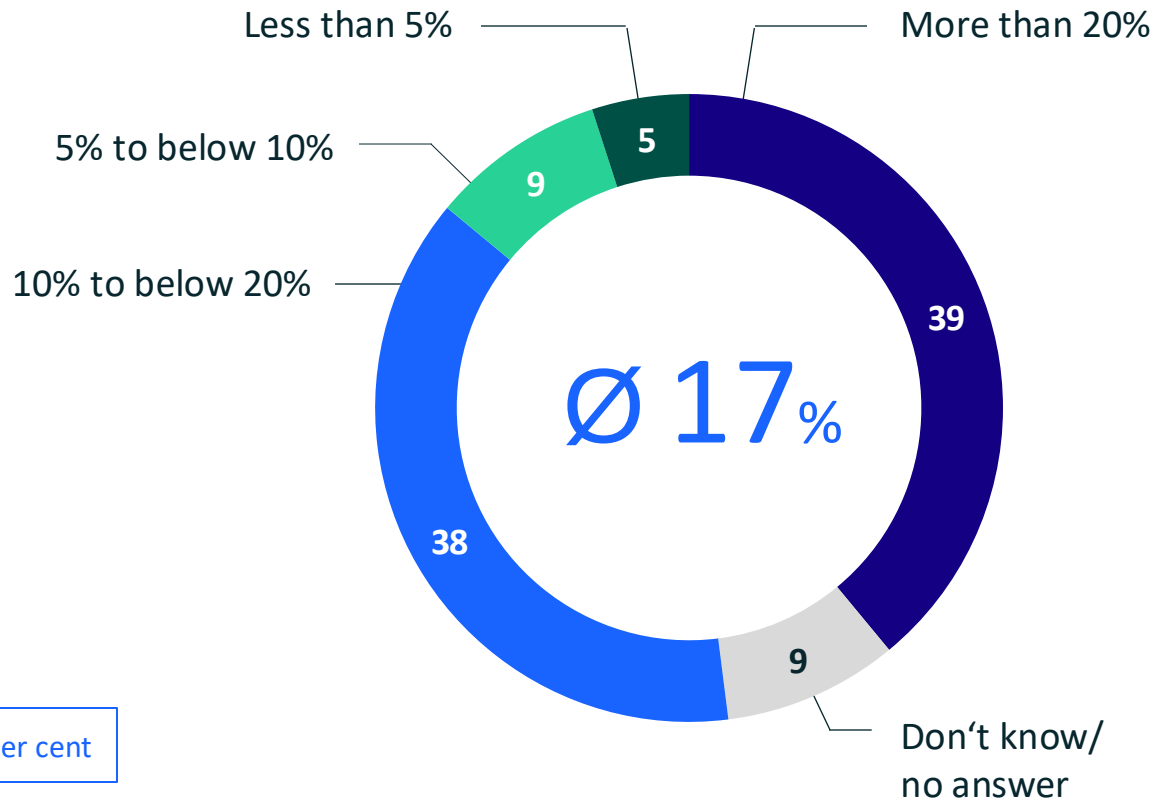
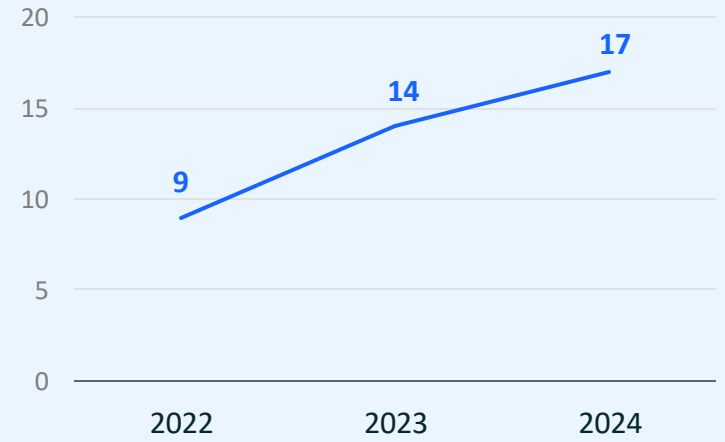
Cybersecurity: increasing willingness to invest

What is the estimated proportion of your company's total IT budget allocated to IT security?



in per cent

Average share of the budget for IT security in the total IT budget



Base: All companies (n=1,003) | Source: Bitkom Research 2024

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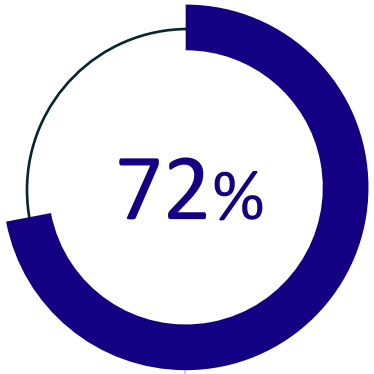
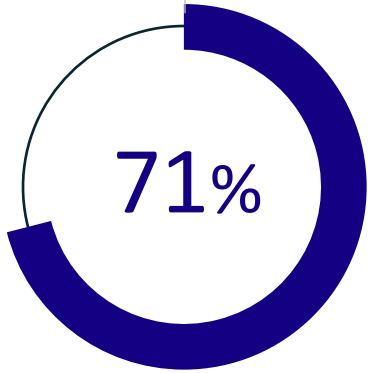
IT security is intertwined with digital sovereignty

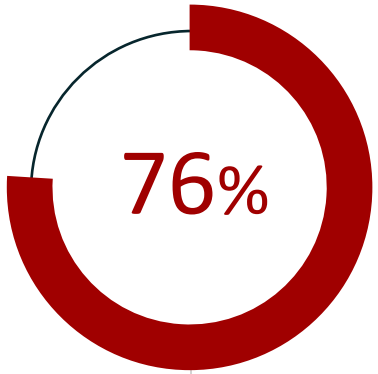
To what extent do the following statements apply?



German IT security companies should explicitly receive targeted support from politicians.

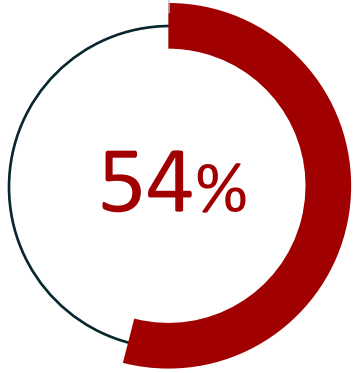
We pay particular attention to the **provider's country of origin** when purchasing IT security solutions.





Public administration is much less prepared for cyber attacks than the German economy.

Compared internationally, **cyber security is neglected** by politicians in Germany.



Base: All companies (n=1,003) | Percentages for "Completely agree" & "Rather agree" | Source: Bitkom Research 2024

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Protecting the Economy in 2024

Dr Ralf Wintergerst
President, Bitkom

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Survey design

Client:	Bitkom e.V.
Methodology	Computer Assisted Telephone Interview (CATI)
Population	German companies with at least 10 employees and an annual turnover of EUR 1 million or more
Interviewees	Decision makers who are responsible for the topic of economic protection. These include managing directors and managers from the areas of corporate security, IT security, risk management and finance.
Sample size	n=1,003
Survey period	CW 16 to CW 24 2024
Statistical margin of error	+/- 3 per cent overall

Source: Bitkom Research 2024

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