EUROPEAN UNION AGENCY
FOR CYBERSECURITY

NIS INVESTMENTS 2025

Survey data companion document

DECEMBER 2025

About ENISA

The European Union Agency for Cybersecurity, ENISA, is the Union's agency dedicated to achieving a high common level of cybersecurity across Europe. Established in 2004 and strengthened by the EU Cybersecurity Act, the European Union Agency for Cybersecurity contributes to EU cyber policy, enhances the trustworthiness of ICT products, services and processes with cybersecurity certification schemes, cooperates with Member States and EU bodies, and helps Europe prepare for the cyber challenges of tomorrow. Through knowledge sharing, capacity building and awareness raising, the Agency works together with its key stakeholders to strengthen trust in the connected economy, to boost resilience of the Union's infrastructure, and, ultimately, to keep Europe's society and citizens digitally secure. More information about ENISA and its work can be found here: www.enisa.europa.eu.

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SECTION 1

About this document

1. About this document

This companion document accompanies the main NIS Investments 2025 report and presents **all responses collected through the study's survey**. It is designed to complement the report's analytical findings by providing a detailed, visual overview of the underlying data.

Through a series of charts, this companion document enables readers to explore **how the broader insights highlighted in the main report manifest across the organisations surveyed** — both within individual **Member States** and across the **different sectors** covered by the study.

By offering this level of granularity, this document allows readers to **examine patterns and variations** in cybersecurity practices, challenges, and levels of preparedness in greater depth. It is intended as a resource for policymakers, regulators, and practitioners seeking to better understand the context behind the study's findings and to support evidence-based decision-making

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SECTION 2

Member State view

2. Member State view

2.1 IT spending

Survey Question: What was your organisation's estimated IT budget or spending in Euros for 2024 (including CAPEX and OPEX for hardware, software, internal personnel, contractors, and outsourcing spending)?

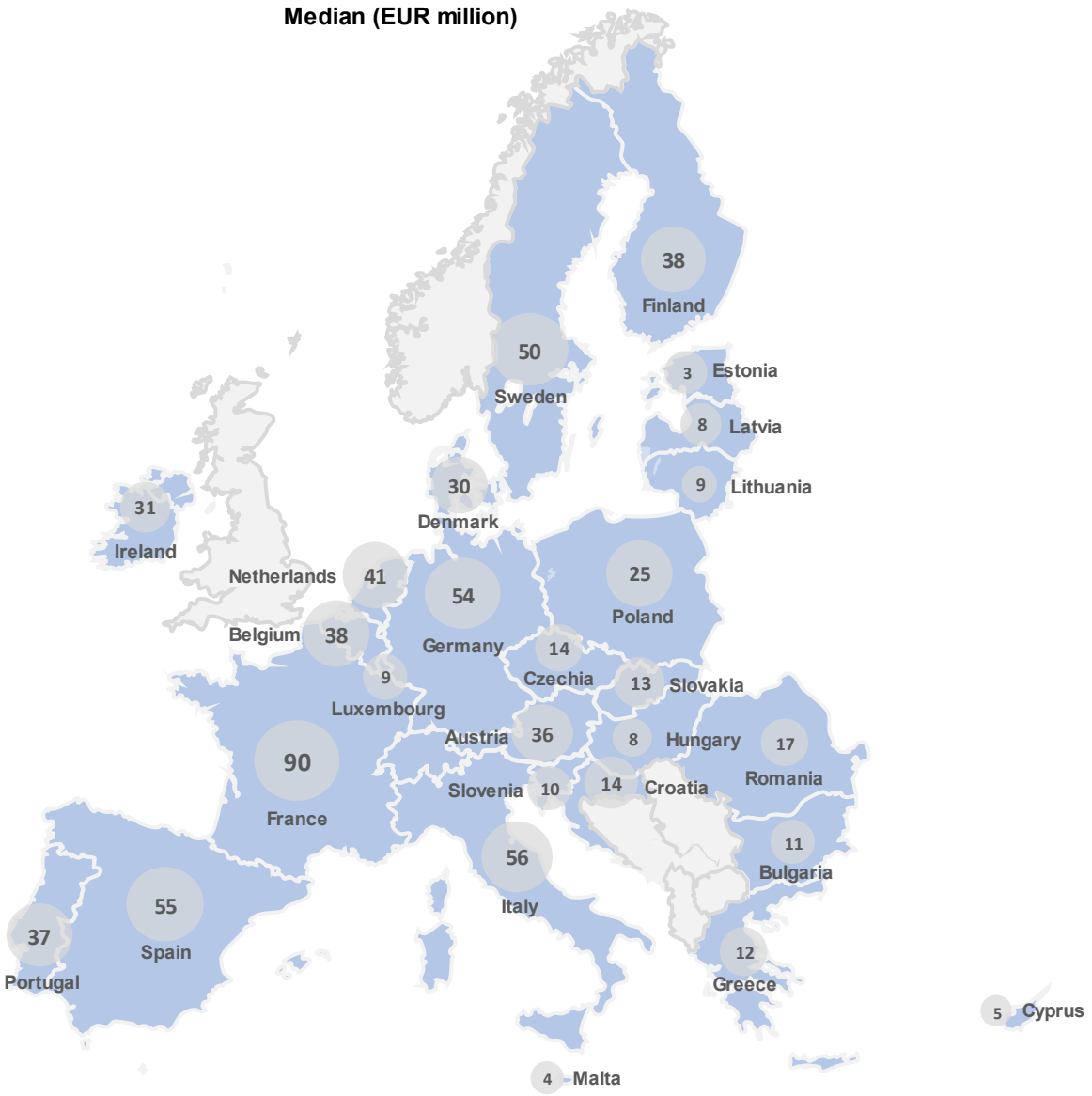

Figure 1 - IT spending per Member State (median values)

2.2 IT spending as a share of revenues

Calculated field: This metric is a calculated field that expresses the proportion (or percentage) of an organisation's revenue that is allocated to IT.

Figure 2 - IT spending as a share of revenues

2.3 IS spending

Survey Question: What was your organisation's estimated Information Security budget or spending in Euros for 2024 (including CAPEX and OPEX for hardware, software, internal personnel, contractors, and outsourcing spending)?

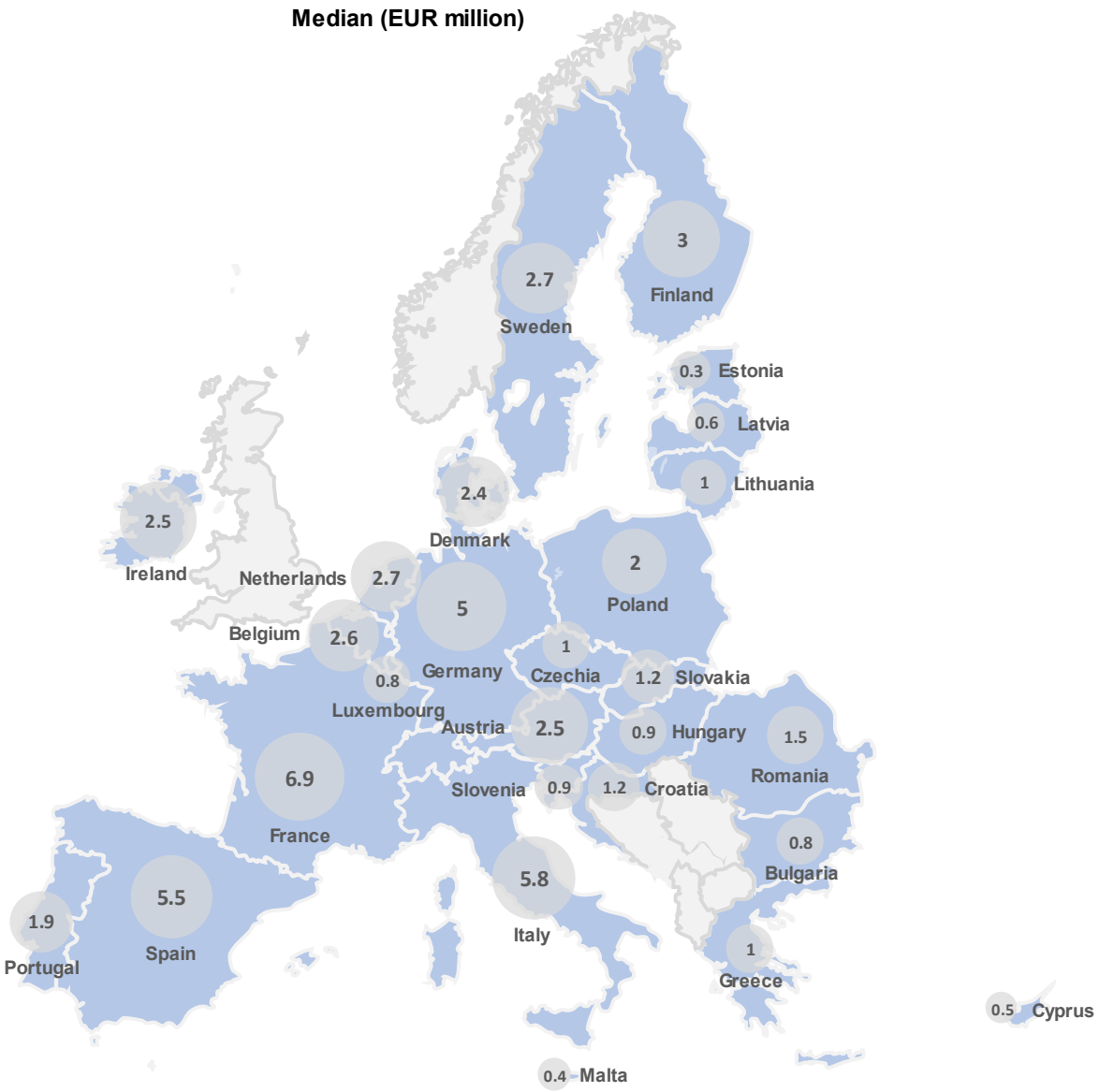

Figure 3 - IS spending per Member State (median values)

2.4 Outcomes attained via cybersecurity investment in 2024

Survey Question: Which of the following outcomes has your organisation achieved as a result of its cybersecurity investments in the past year? (Select up to three)

Disclaimer: This graph visualises the proportion that each response represents out of all responses received from organisations within the respective Member State. Not the proportion of entities within the respective Member State, having provided that answer.

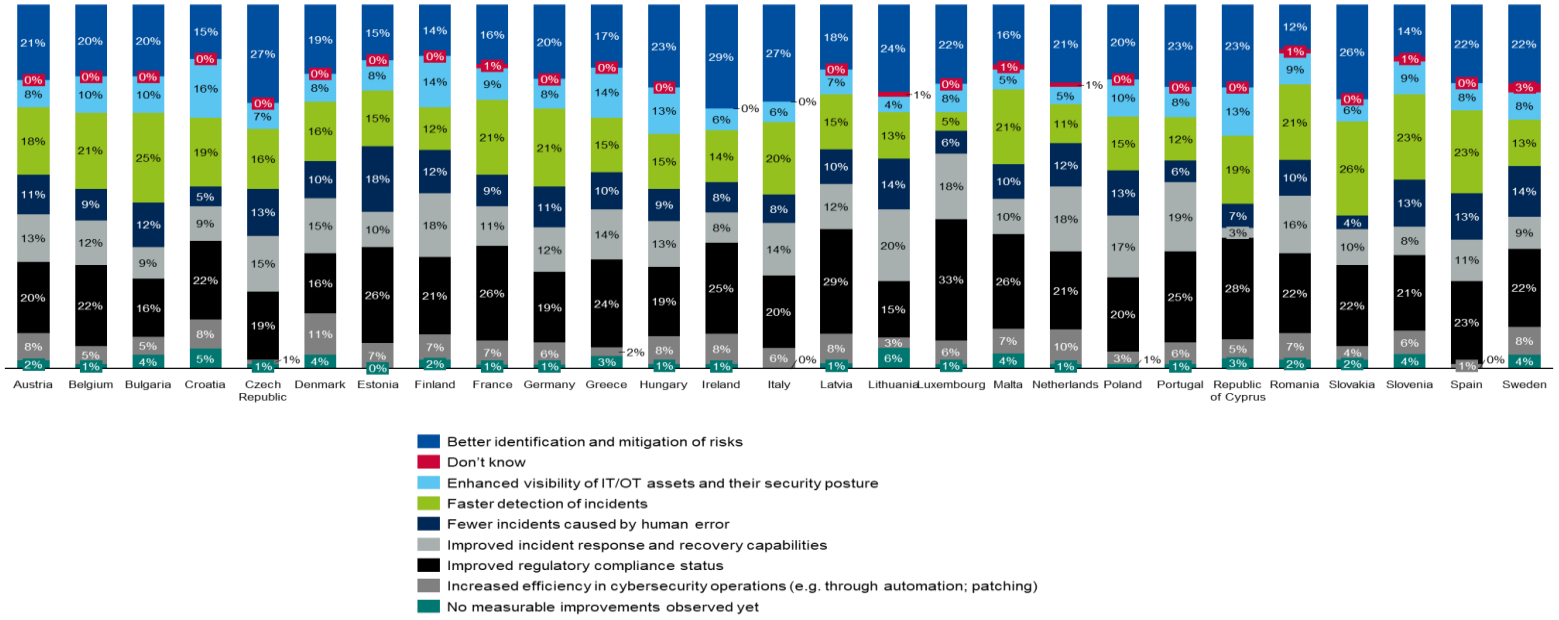

Figure 4 - Outcomes attained via cybersecurity investment in 2024, per Member State

2.5 Key cybersecurity investment drivers for 2024

Survey Question: In the past year, which of the following has most significantly driven cybersecurity investment in your organisation? (Select up to 3)

Disclaimer: This graph visualises the proportion that each response represents out of all responses received from organisations within the respective Member State. Not the proportion of entities within the respective Member State, having provided that answer.

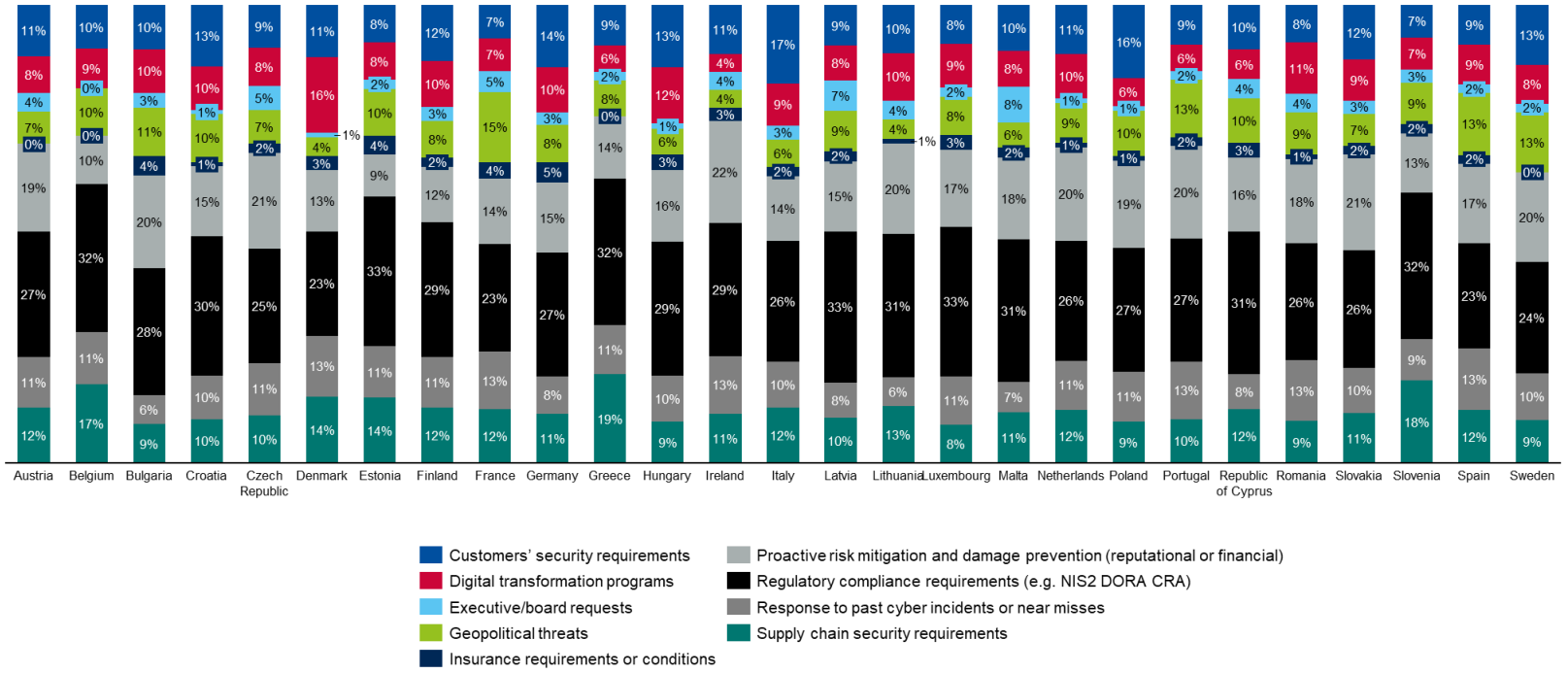

Figure 5 - Key cybersecurity investment drivers for 2024, per Member State

2.6 Targeted outcomes of cybersecurity investment in the coming year

Survey Question: Which of the following outcomes are you primarily targeting with your cybersecurity investments in the coming year? (Select up to three)

Disclaimer: This graph visualises the proportion that each response represents out of all responses received from organisations within the respective Member State. Not the proportion of entities within the respective Member State, having provided that answer.

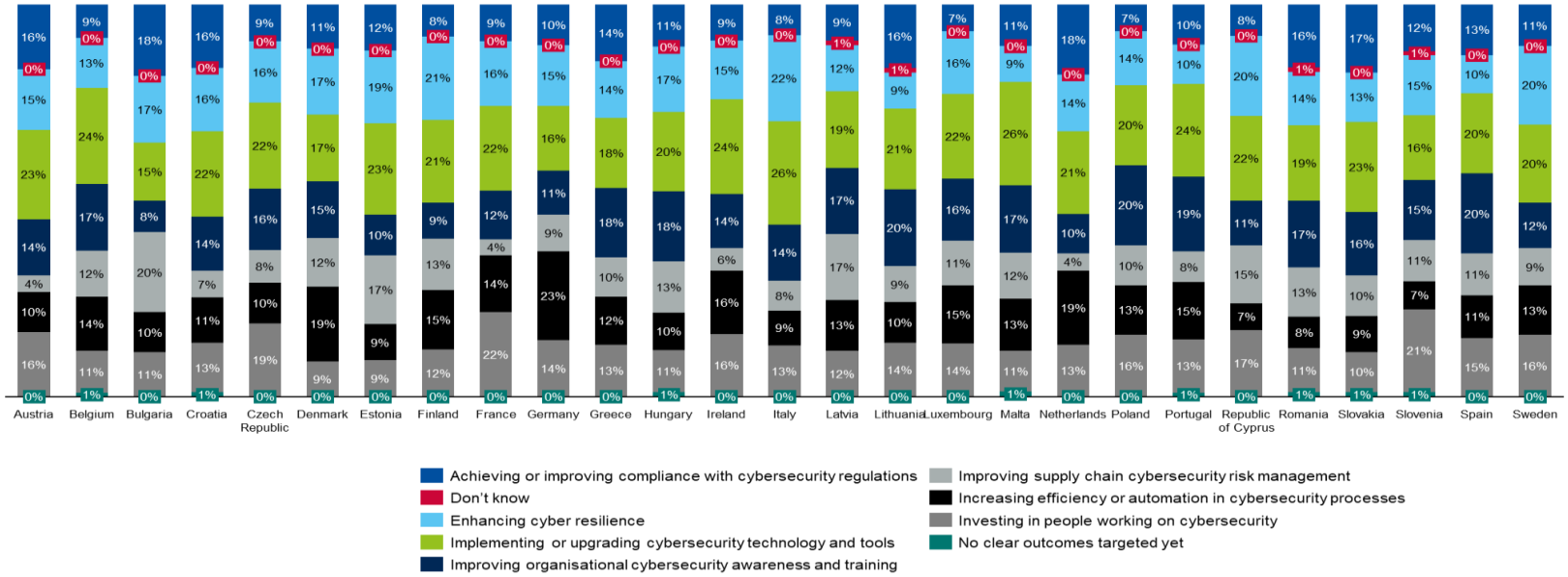

Figure 6 - Targeted outcomes of cybersecurity investment in the coming year, per Member State

2.7 IT FTEs

Survey Question: What was your organisation's estimated number of IT FTEs for 2024 including internal staff and contractors?

Figure 7 - IT FTEs per Member State (median values)

2.8 IS FTEs

Survey Question: What was your organisation's estimated number of Information Security FTEs for 2024 including internal staff and contractors?

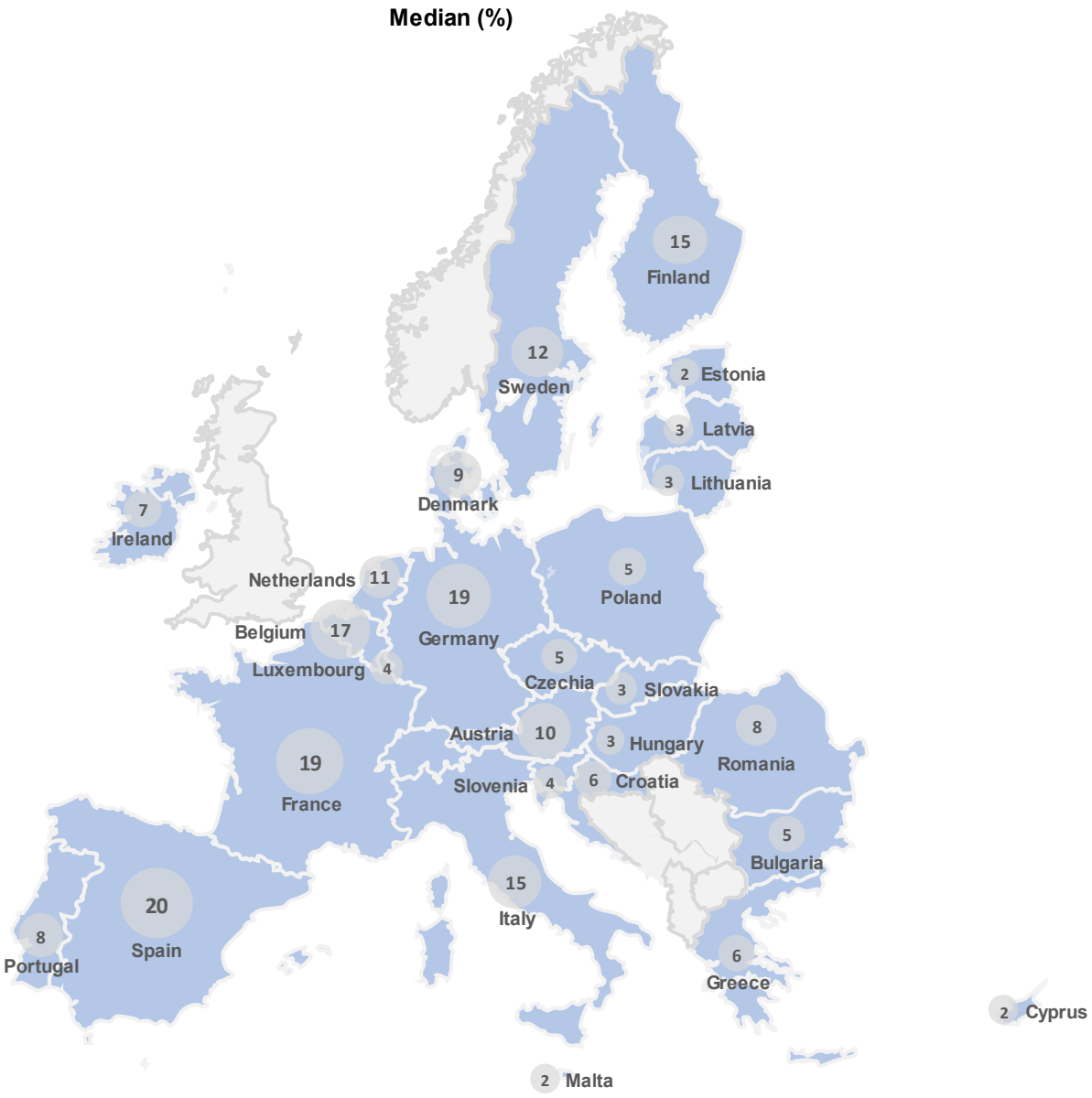

Figure 8 - IS FTEs per Member State (median values)

2.9 IS FTEs as a share of IT FTEs

Calculated field: This metric is a calculated field that expresses the proportion (or percentage) of an organisation's IS FTEs over IT FTEs.

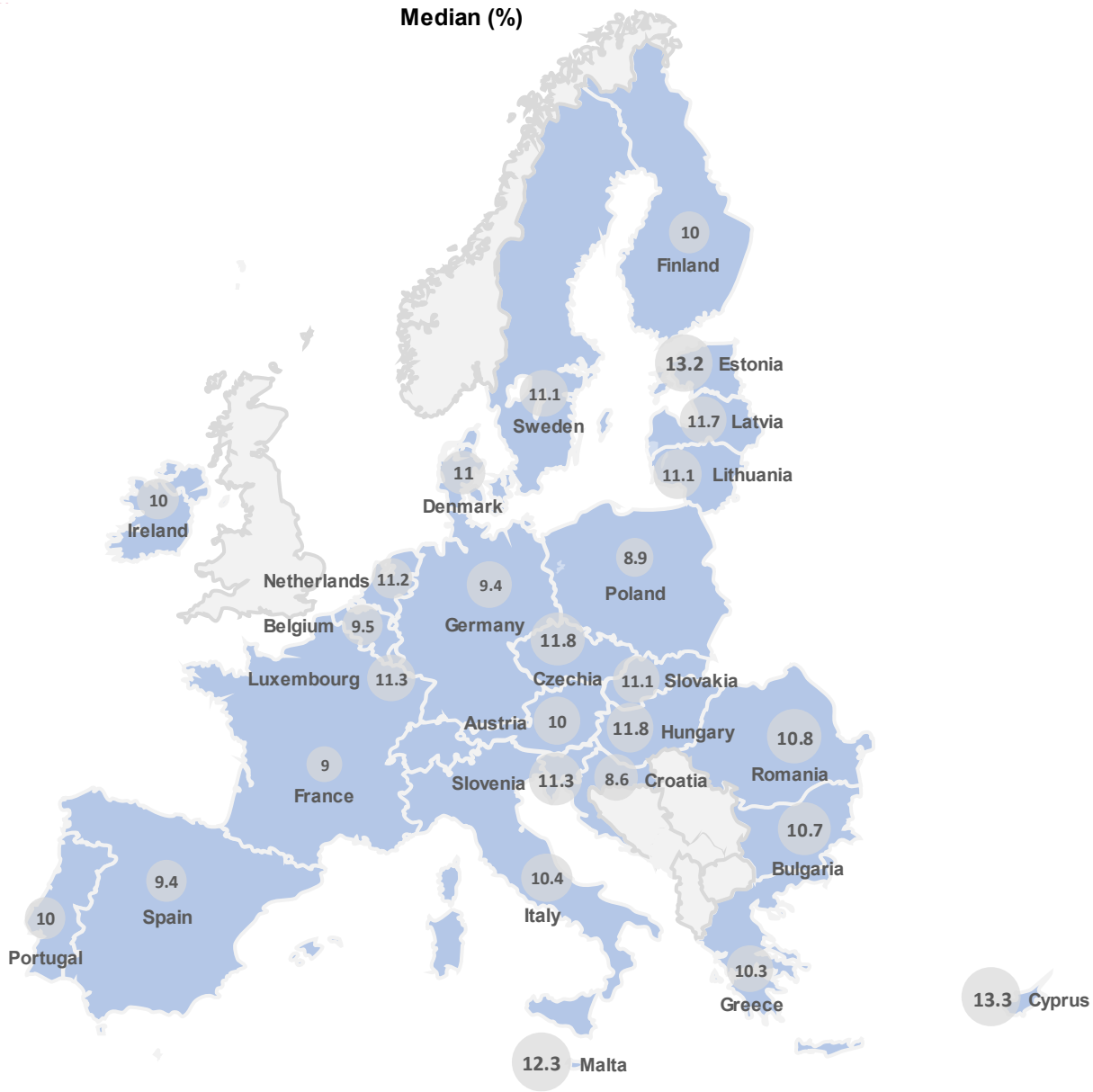

Figure 9 - IS FTEs as a share of IT FTEs per Member State (median values)

2.10 Proportion of women in IS FTEs

Survey Question: Please share what percentage of your IS FTEs are women?

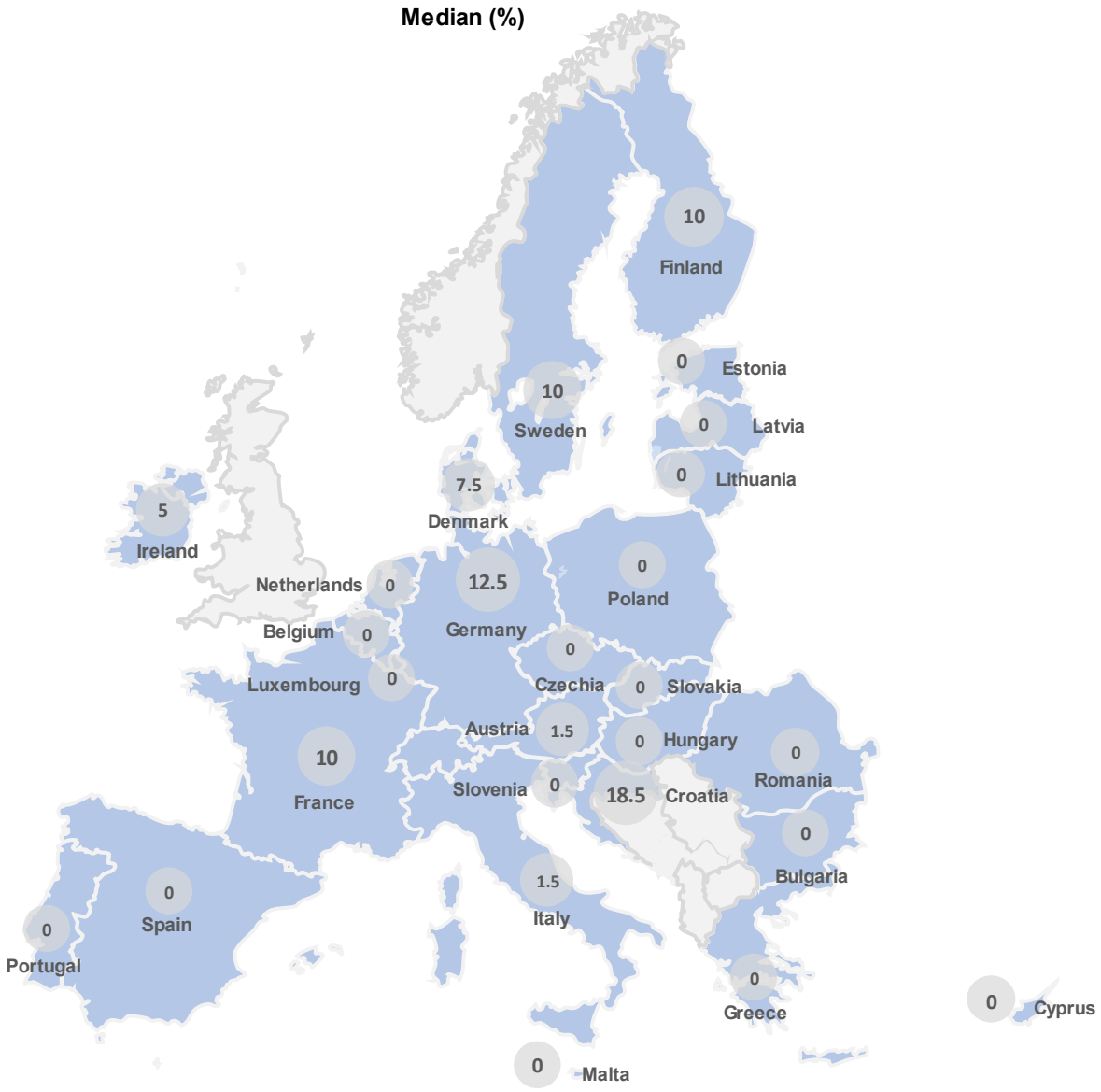

Figure 10 - Proportion of women in IS FTEs (median values)

2.11 Challenges to attracting cybersecurity talent

Survey Question: Which barriers does your organisation face in attracting cybersecurity personnel? (Select up to three)

Disclaimer: This graph visualises the proportion that each response represents out of all responses received from organisations within the respective Member State. Not the proportion of entities within the respective Member State, having provided that answer.

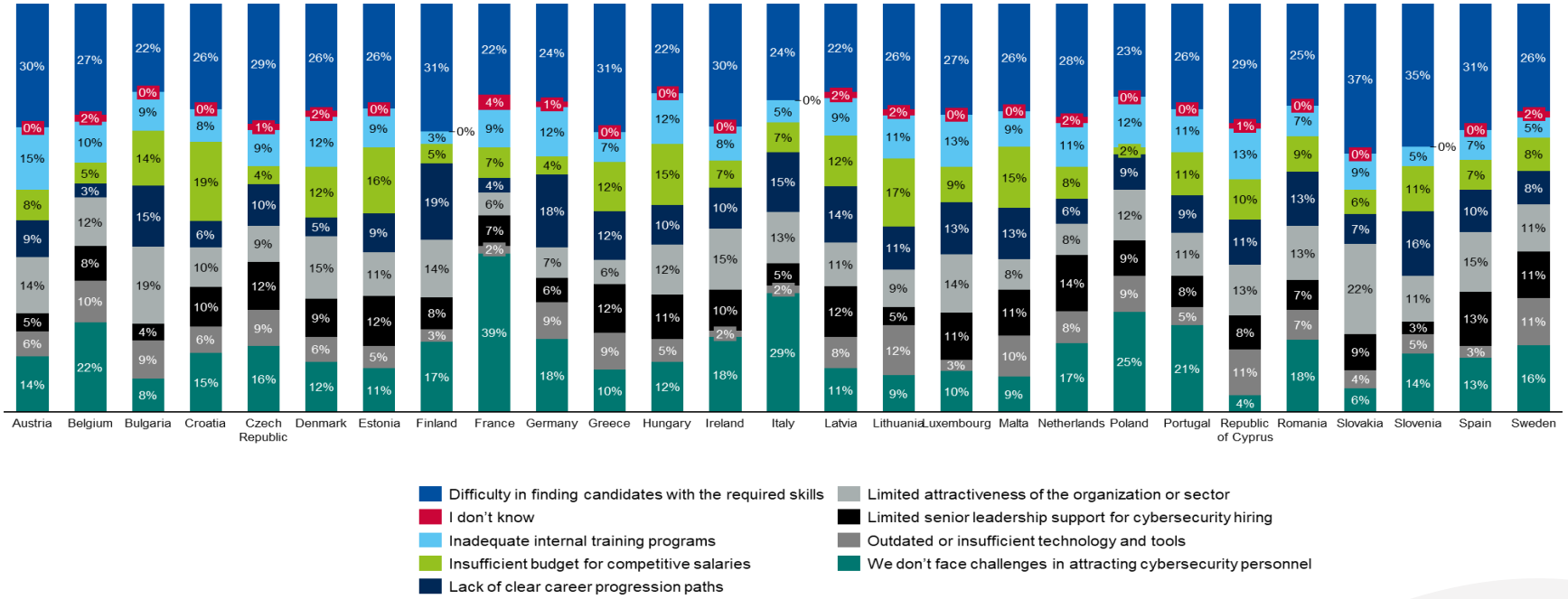

Figure 11 - Challenges to attracting cybersecurity talent, per Member State

2.12 Challenges to retaining cybersecurity personnel

Survey Question: What are the main challenges your organisation faces in retaining cybersecurity personnel? (Select up to three)

Disclaimer: This graph visualises the proportion that each response represents out of all responses received from organisations within the respective Member State. Not the proportion of entities within the respective Member State, having provided that answer.

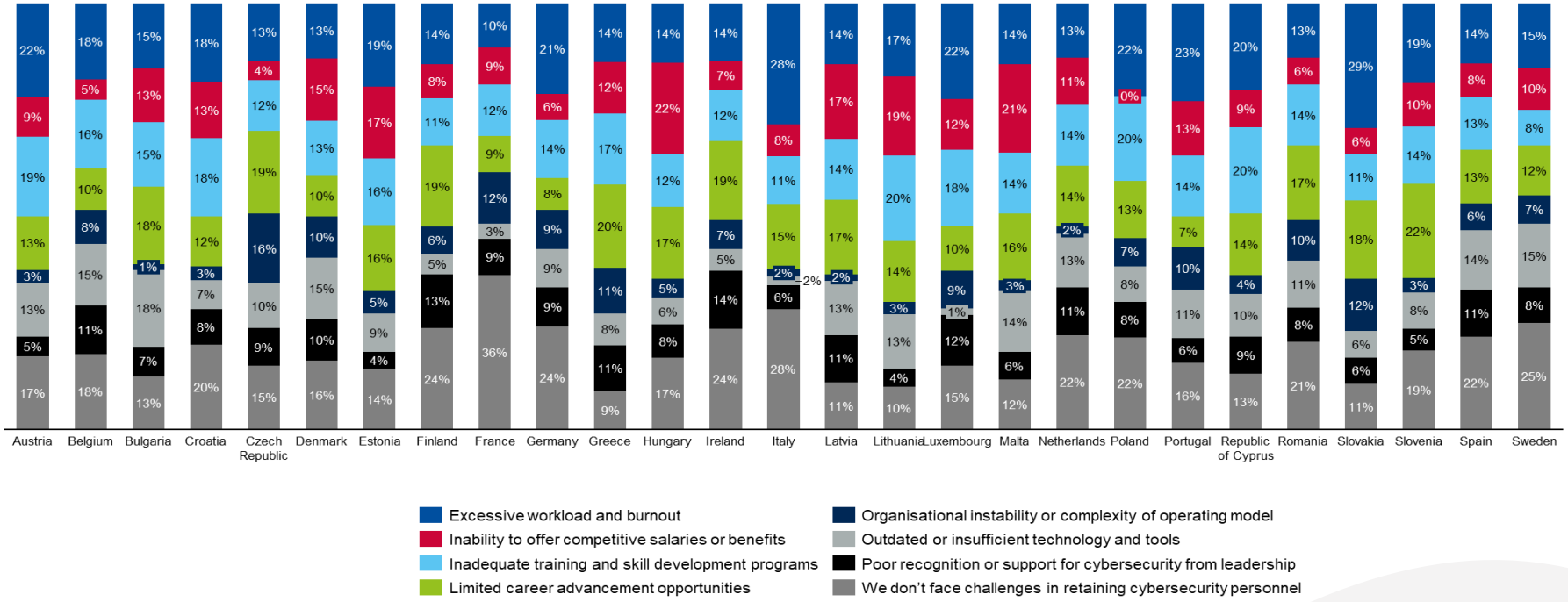

Figure 12 - Challenges to retaining cybersecurity personnel, per Member State

2.13 Cybersecurity staffing strategy

Survey Question: What best describes your organisation's cybersecurity staffing plan for the next 12 months?

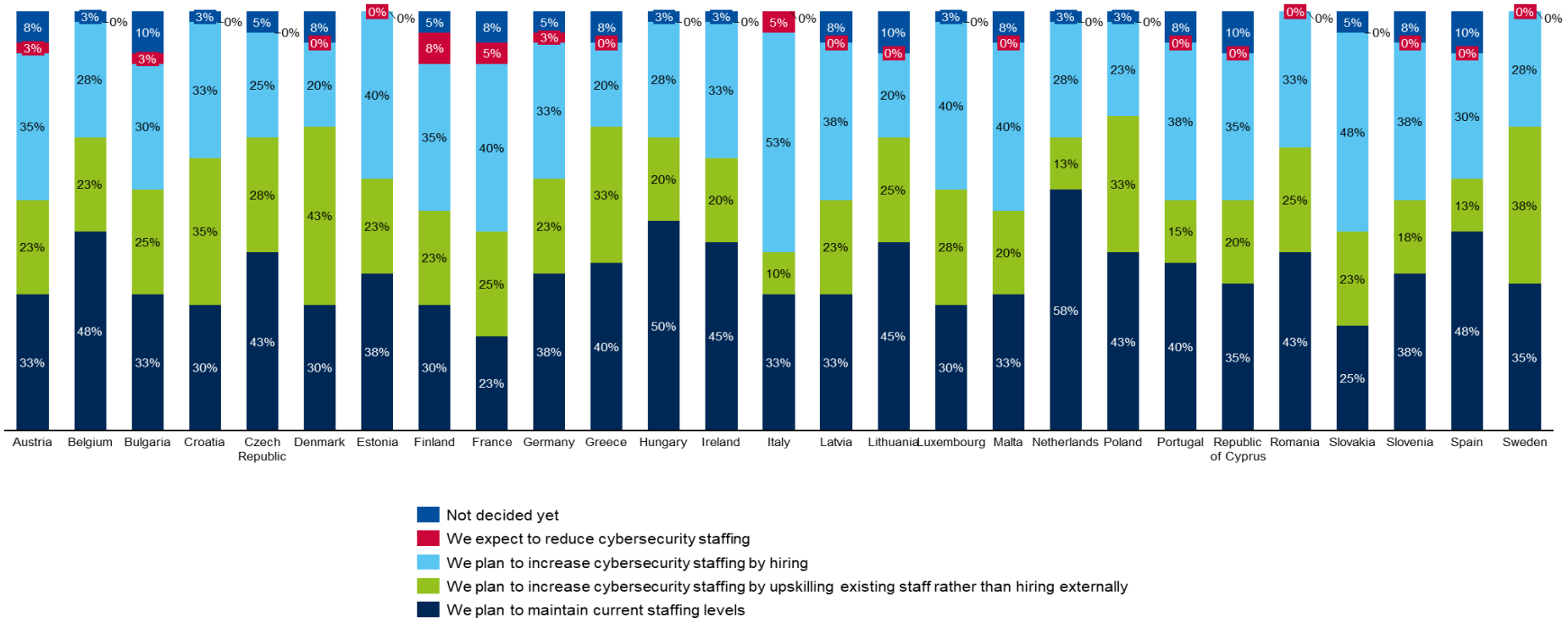

Figure 13 - Cybersecurity staffing strategy, per Member State

2.14 Cost reduction measures affecting cybersecurity staffing

Survey Question: In the past year, did your organisation take any of the following cost reduction measures affecting cybersecurity staffing?

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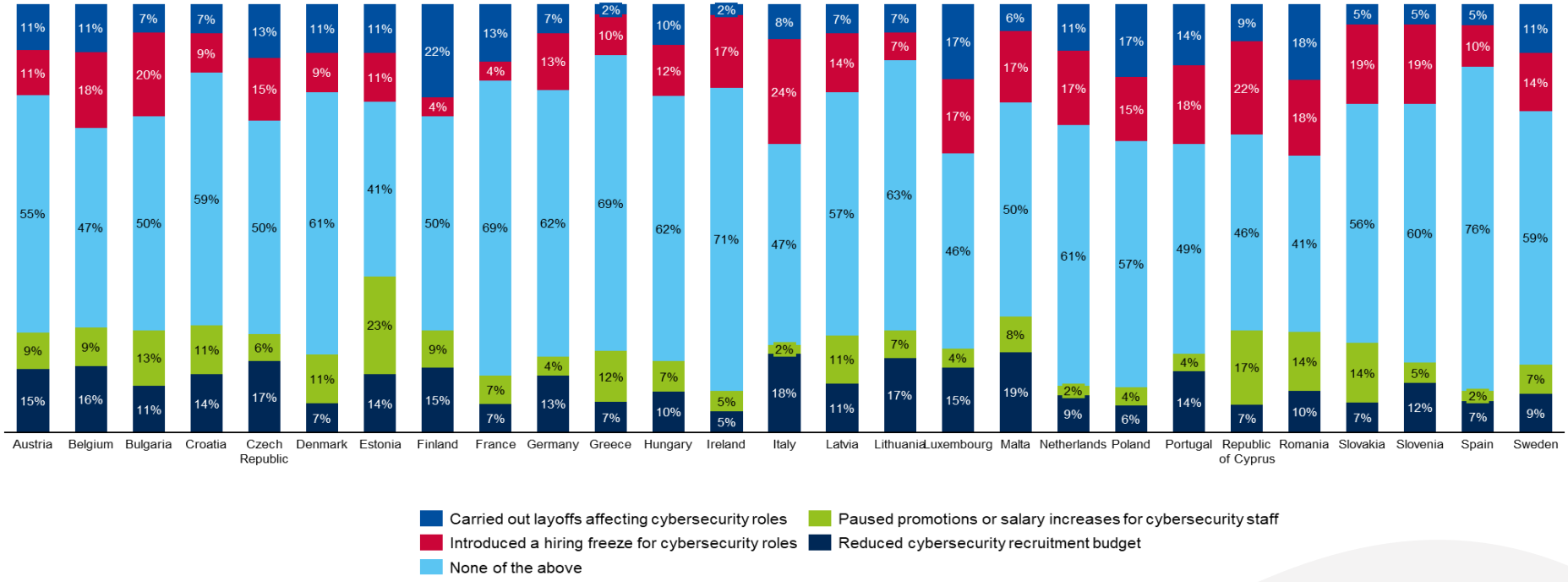


Figure 14 - Cost reduction measures affecting cybersecurity staffing, per Member State

2.15 Most in-demand cybersecurity skills currently

Survey Question: Which of the following are the most in-demand cybersecurity skills in your organisation right now? (Select up to 3)

Disclaimer: This graph visualises the proportion that each response represents out of all responses received from organisations within the respective Member State. Not the proportion of entities within the respective Member State, having provided that answer.

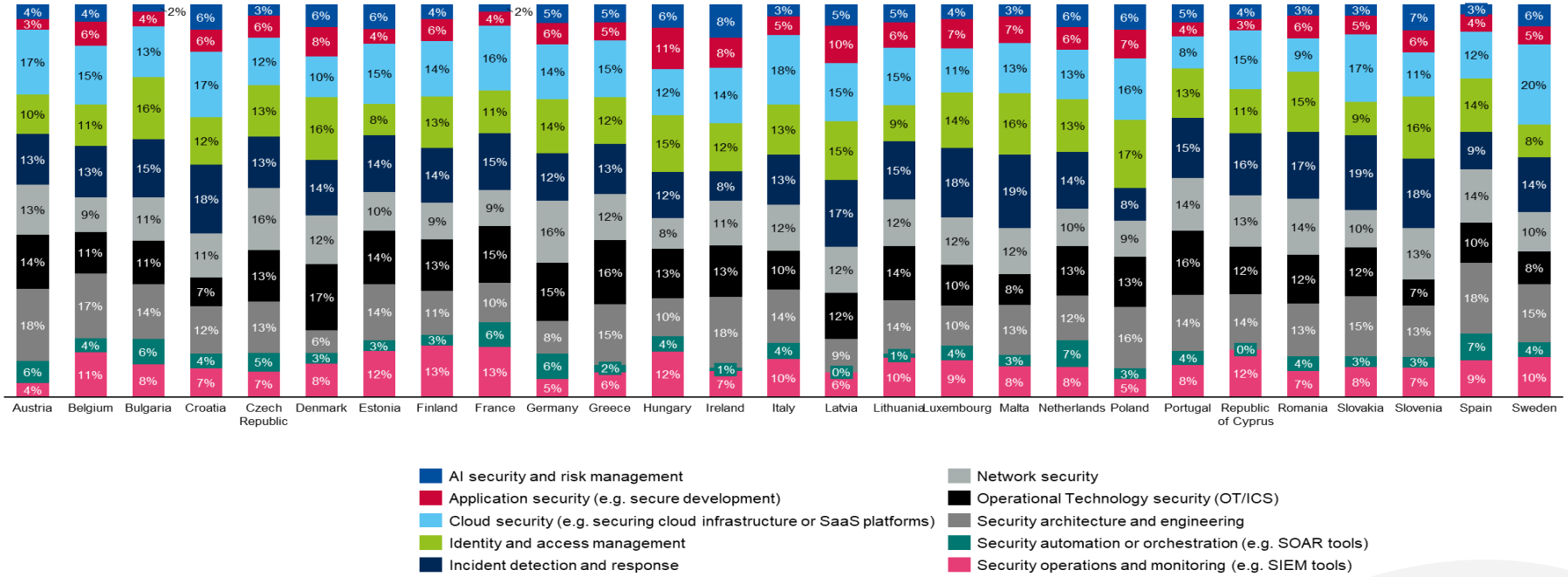


Figure 15 - Most in demand cybersecurity skills currently, per Member State

2.16 Most challenging NIS2 requirements to implement

Survey Question: Which of the following NIS2 areas is the most challenging for your organisation to implement? (Select up to three)

Disclaimer: This graph visualises the proportion that each response represents out of all responses received from organisations within the respective Member State. Not the proportion of entities within the respective Member State, having provided that answer.

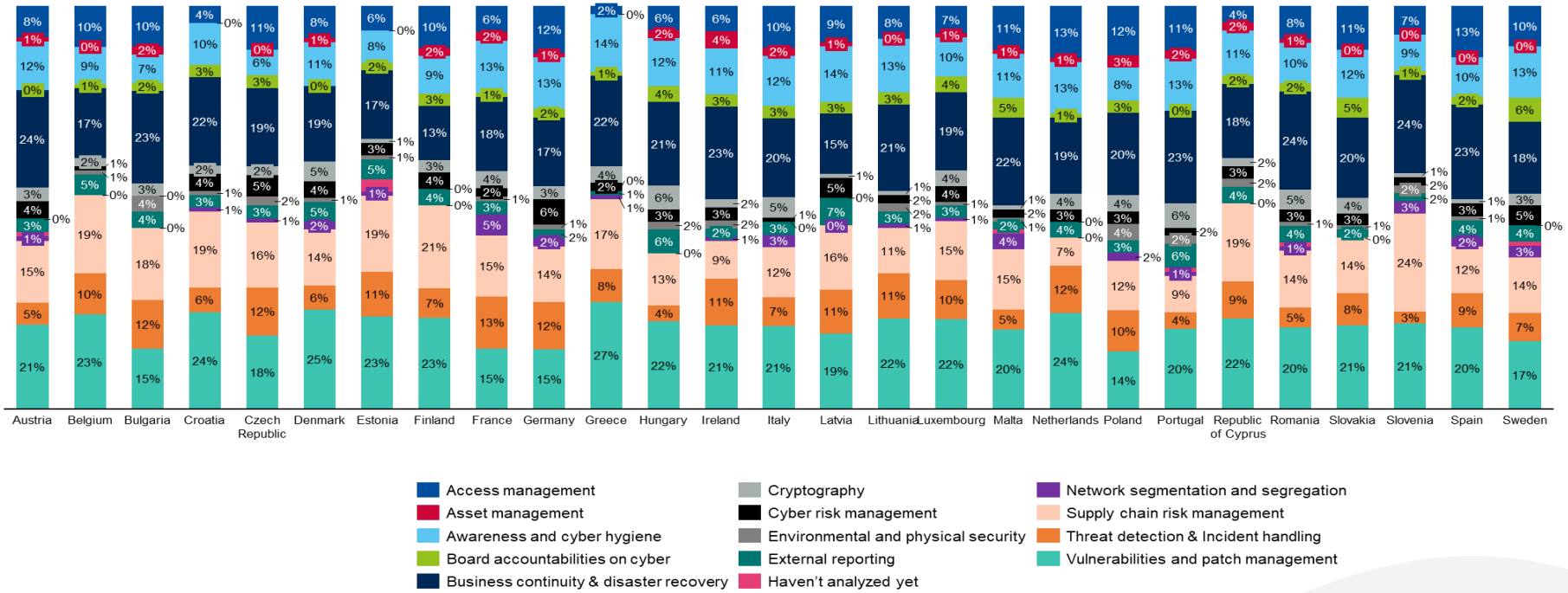


Figure 16 - Most challenging NIS2 requirements, per Member State

2.17 Main obstacle to implementing NIS2 requirements

Survey Question: What is the **main obstacle** to implementing these controls effectively?

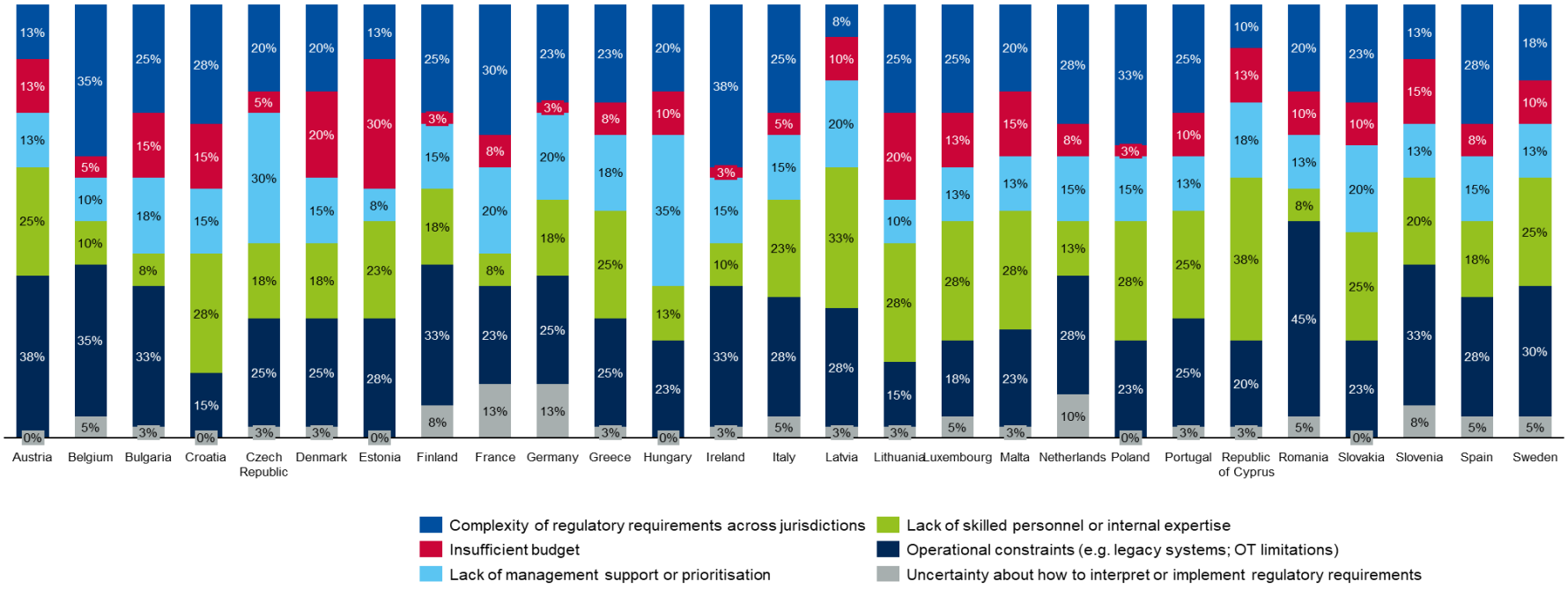


Figure 17 - Main obstacle to implementing NIS2 requirements, per Member State

2.18 Cybersecurity assessments

Survey Question: Has your organisation conducted any form of cybersecurity assessment or testing (e.g. technical audit, penetration test, red team exercise, maturity assessment) within the past 12 months?

	YES %	NO %	DON'T KNOW
Austria	78%	22%	0%
Belgium	88%	10%	2%
Bulgaria	63%	37%	0%
Croatia	73%	27%	0%
Czechia	59%	39%	2%
Denmark	83%	17%	0%
Estonia	50%	50%	0%
Finland	78%	22%	0%
France	90%	10%	0%
Germany	80%	20%	0%
Greece	73%	27%	0%
Hungary	65%	35%	0%
Ireland	86%	12%	2%
Italy	83%	17%	0%
Latvia	66%	32%	2%
Lithuania	53%	47%	0%
Luxembourg	65%	35%	0%
Malta	63%	37%	0%
Netherlands	65%	35%	0%
Poland	68%	32%	0%
Portugal	60%	40%	0%
Republic of Cyprus	43%	57%	0%
Romania	65%	35%	0%
Slovakia	58%	42%	0%
Slovenia	64%	34%	2%
Spain	80%	20%	0%
Sweden	75%	25%	0%

Figure 18 - Proportion of entities having conducted any form of cybersecurity assessment in the past 12 months

2.19 Average time to patch critical vulnerabilities on critical systems

Survey Question: What is the average time to patch critical vulnerabilities on your organisation's critical assets (IT and OT)?

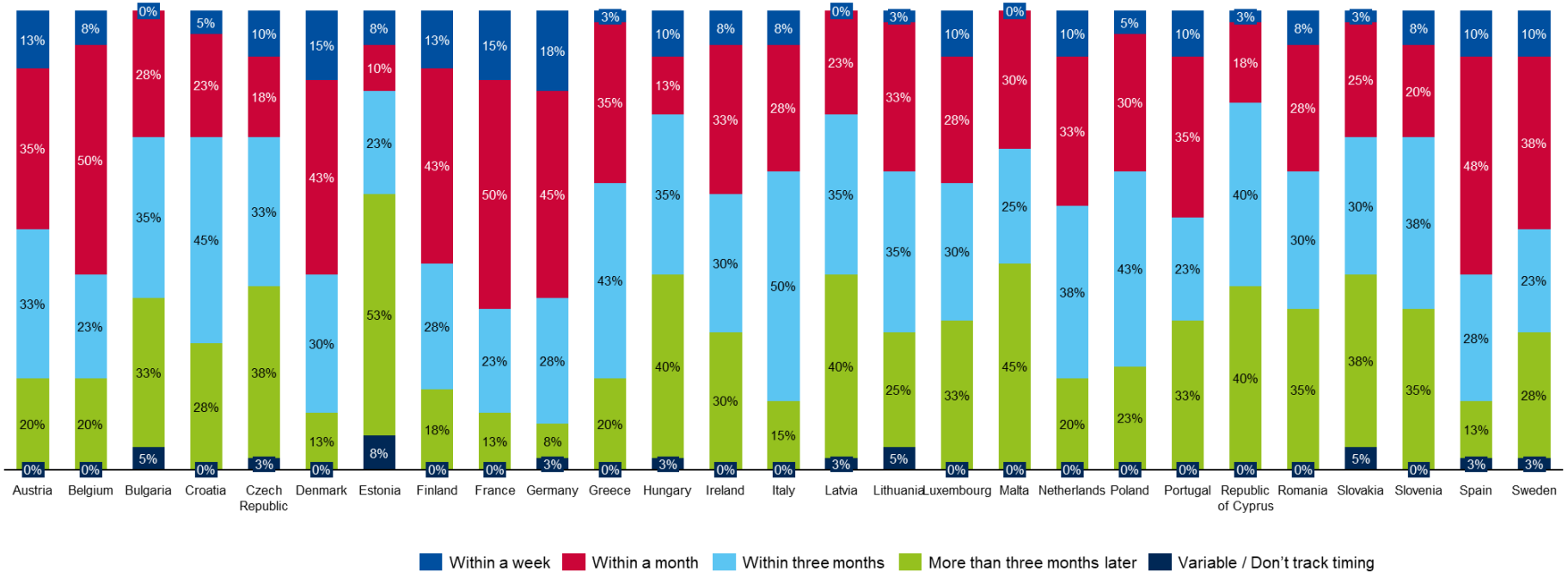


Figure 19 - Average time to patch critical vulnerabilities on critical systems, per Member State

2.20 Supply chain risk management practices implemented

Survey Question: Which of the following supply chain risk management practices are currently in place in your organisation? (Multiple choices possible)

Disclaimer: This graph visualises the proportion that each response represents out of all responses received from organisations within the respective Member State. Not the proportion of entities within the respective Member State, having provided that answer.

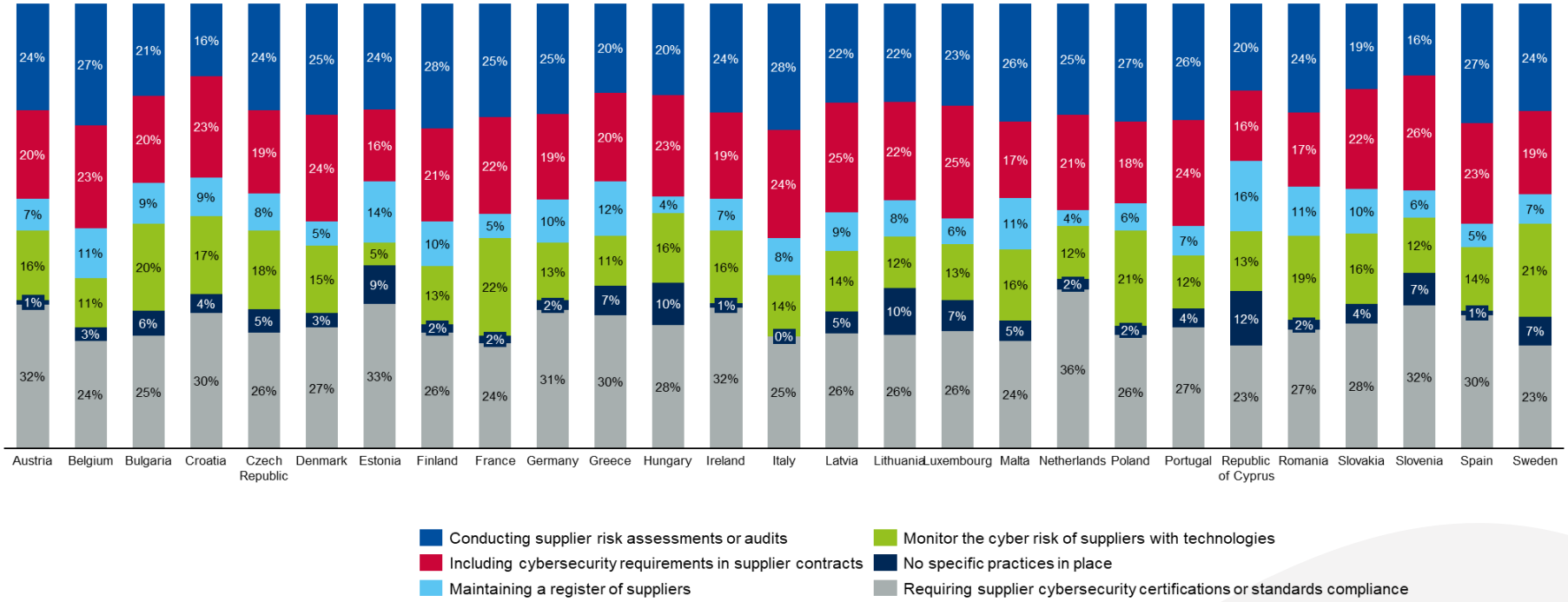


Figure 20 - Supply chain risk management practices implemented, per Member State

2.21 Characteristics of preferred suppliers of digital products

Survey Question: When procuring products with digital elements (hardware or software), which supplier categories do you commonly use? (Select all that apply)

Disclaimer: This graph visualises the proportion that each response represents out of all responses received from organisations within the respective Member State. Not the proportion of entities within the respective Member State, having provided that answer.

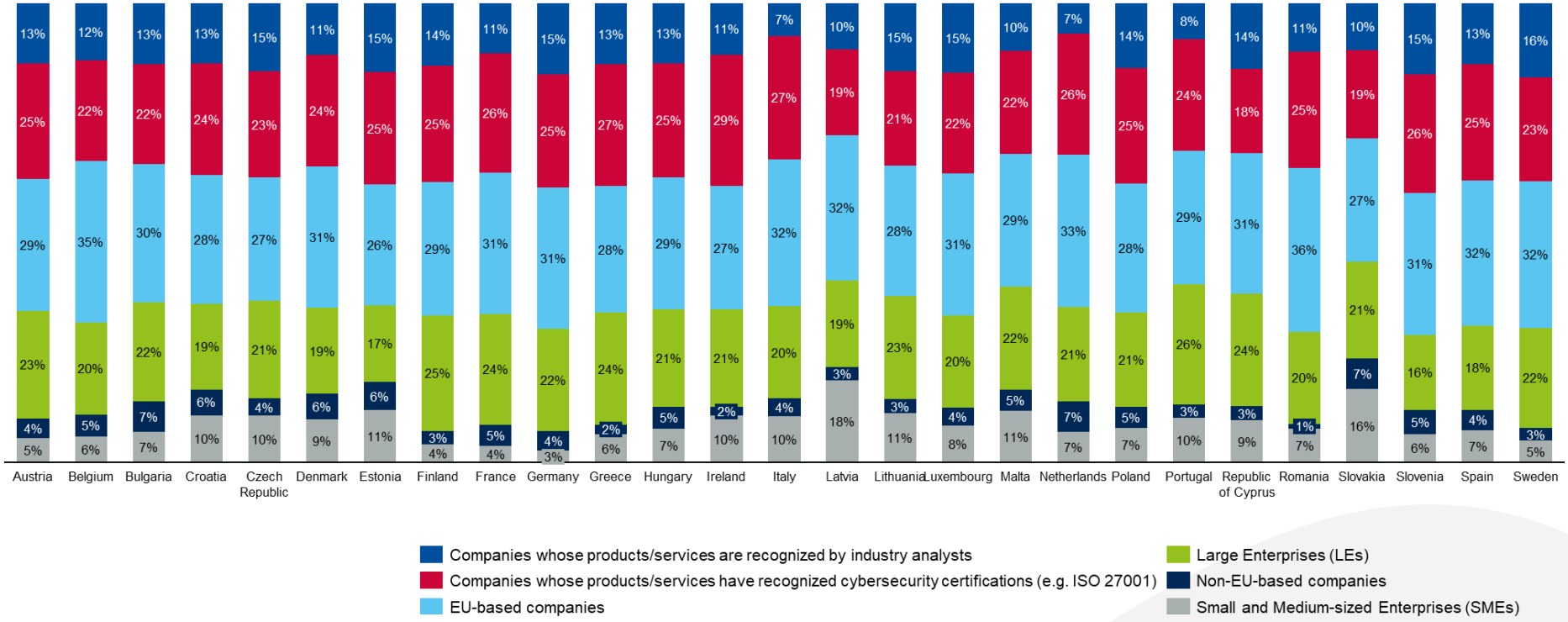


Figure 21 - Characteristics of preferred suppliers of products with digital elements, per Member State

2.22 Information Sharing

Survey Question: Does your organisation engage in collaboration and information sharing with others? (Multiple choices possible)

Disclaimer: This graph visualises the proportion that each response represents out of all responses received from organisations within the respective Member State. Not the proportion of entities within the respective Member State, having provided that answer.

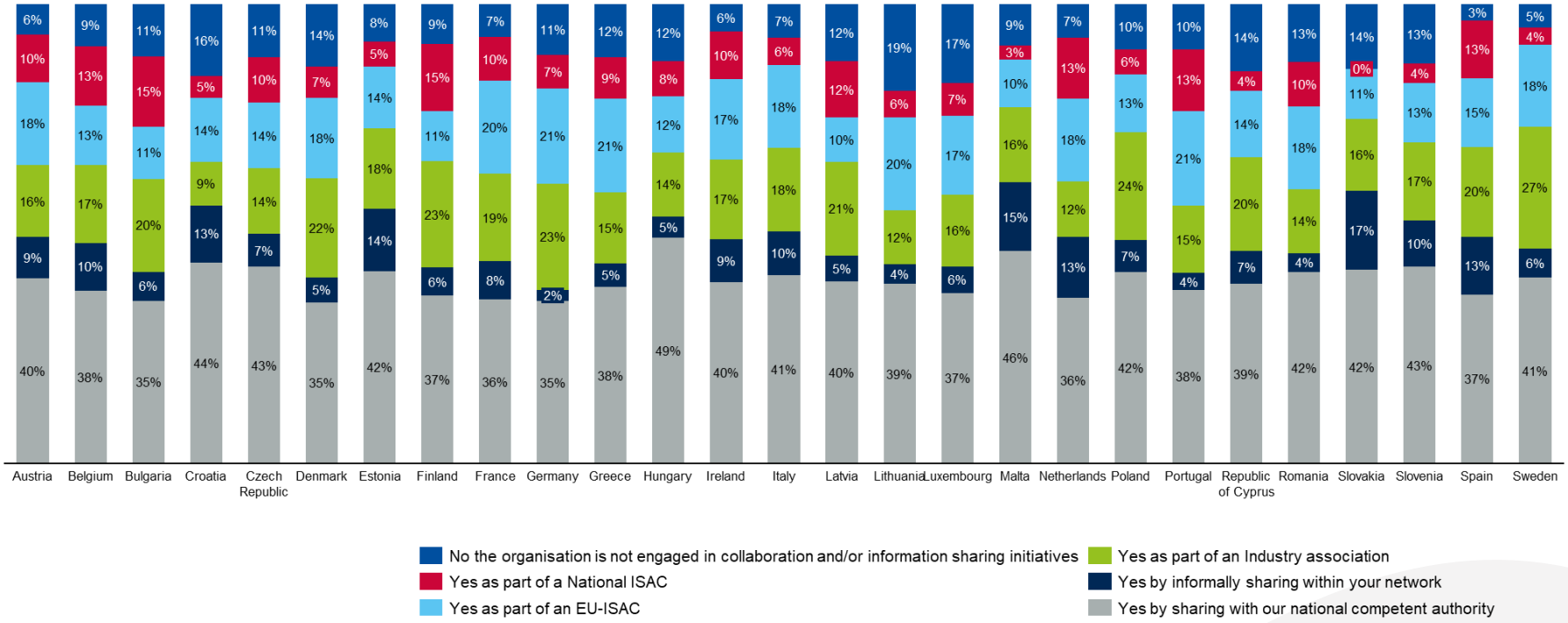


Figure 22 - Participation in information sharing, per Member State

2.23 Attacks with the greatest operational impact on day-to-day operations

Survey Question: In the past 12 months, which type of cyberattack had the greatest impact on your day-to-day operations?

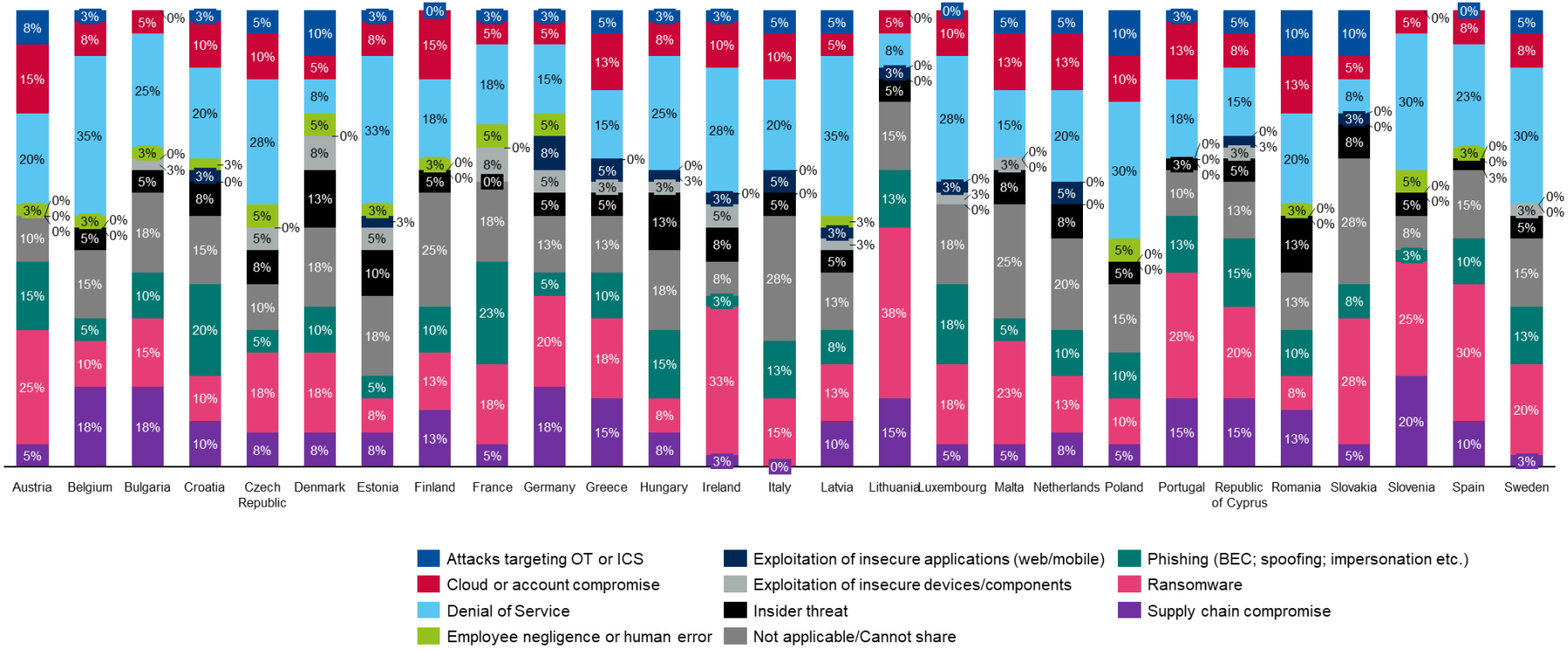


Figure 23 - Attacks with the greatest operational impact on day-to-day operations, per Member State

2.24 Cybersecurity threats of most concern looking ahead

Survey Question: Which of the following cybersecurity risks or attack types concern you the most looking ahead? (Select up to 3)

Disclaimer: This graph visualises the proportion that each response represents out of all responses received from organisations within the respective Member State. Not the proportion of entities within the respective Member State, having provided that answer.

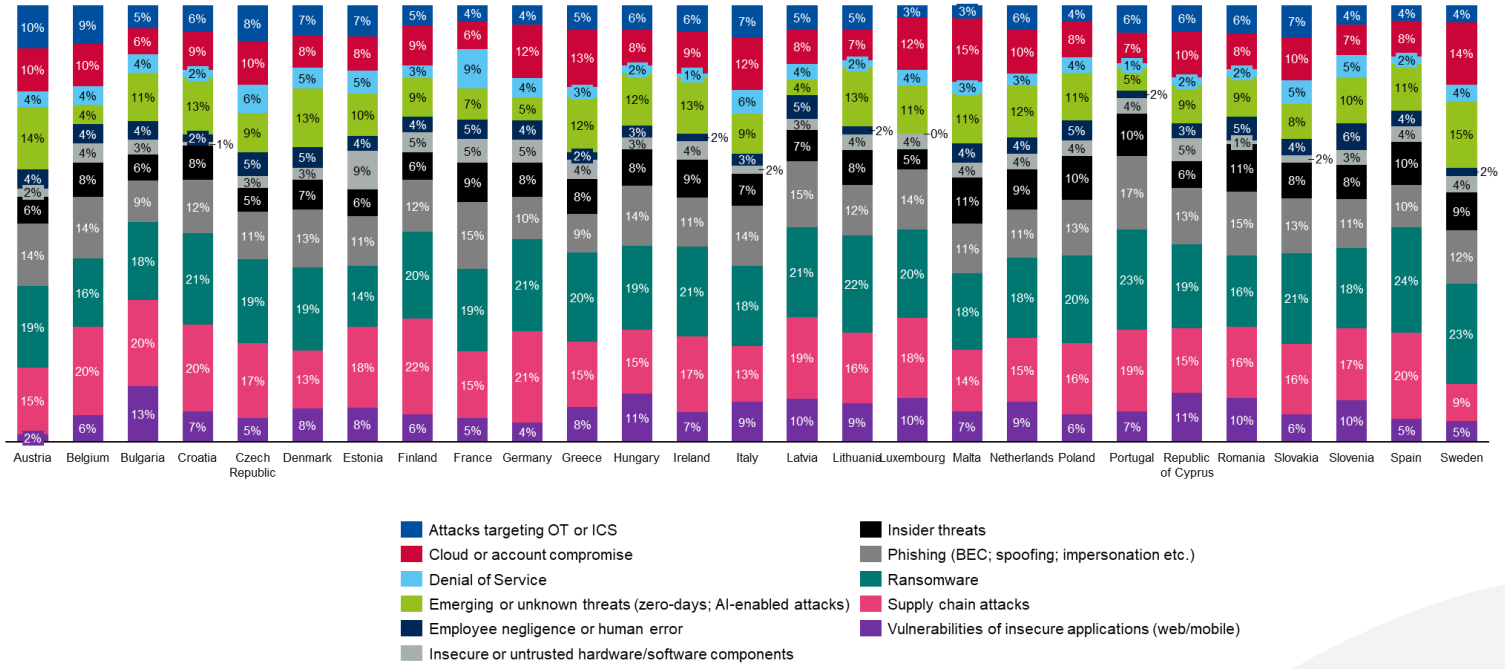


Figure 24 - Cybersecurity threats of most concern looking ahead, per Member State

2.25 Preparedness against scenarios

Survey Question: For each of the following scenarios, would you categorize your organization's current stance as predominantly prepared or unprepared? –

(Cybersecurity preparedness refers to your organisation's ability to anticipate, prevent, respond to, and recover from cyber incidents effectively)

A ransomware attack that encrypts critical systems

	Predominantly prepared%	Predominantly unprepared%
Austria	88%	12%
Belgium	80%	20%
Bulgaria	85%	15%
Croatia	80%	20%
Czechia	88%	12%
Denmark	75%	25%
Estonia	78%	22%
Finland	85%	15%
France	88%	12%
Germany	83%	17%
Greece	90%	10%
Hungary	88%	12%
Ireland	83%	17%
Italy	83%	17%
Latvia	68%	32%
Lithuania	90%	10%
Luxembourg	80%	20%
Malta	85%	15%
Netherlands	85%	15%
Poland	93%	7%
Portugal	83%	17%
Republic of Cyprus	70%	30%
Romania	88%	12%
Slovakia	88%	12%
Slovenia	80%	20%
Spain	88%	12%
Sweden	88%	12%

Figure 25 - Preparedness against ransomware

Survey Question: For each of the following scenarios, would you categorize your organization's current stance as predominantly prepared or unprepared? –

A supply chain attack or compromise to a third-party service

	Predominantly prepared %	Predominantly unprepared %	Not applicable %
Austria	70%	27%	3%
Belgium	70%	30%	0%
Bulgaria	48%	52%	0%
Croatia	60%	40%	0%
Czechia	63%	34%	3%
Denmark	68%	32%	0%
Estonia	38%	62%	0%
Finland	60%	40%	0%
France	70%	30%	0%
Germany	75%	25%	0%
Greece	68%	32%	0%
Hungary	55%	45%	0%
Ireland	58%	42%	0%
Italy	55%	45%	0%
Latvia	55%	45%	0%
Lithuania	63%	37%	0%
Luxembourg	48%	52%	0%
Malta	40%	60%	0%
Netherlands	63%	37%	0%
Poland	60%	40%	0%
Portugal	53%	47%	0%
Republic of Cyprus	50%	50%	0%
Romania	45%	55%	0%
Slovakia	60%	40%	0%
Slovenia	53%	47%	0%
Spain	73%	27%	0%
Sweden	65%	35%	0%

Figure 26 - Preparedness against supply chain attack or third-party compromise

Survey Question: For each of the following scenarios, would you categorize your organization's current stance as predominantly prepared or unprepared? –

A cyberattack causes IT/OT infrastructure outage or degradation

	Predominantly prepared %	Predominantly unprepared %
Austria	70%	30%
Belgium	68%	32%
Bulgaria	68%	32%
Croatia	65%	35%
Czechia	68%	32%
Denmark	65%	35%
Estonia	53%	47%
Finland	68%	32%
France	80%	20%
Germany	73%	27%
Greece	78%	22%
Hungary	68%	32%
Ireland	75%	25%
Italy	70%	30%
Latvia	70%	30%
Lithuania	55%	45%
Luxembourg	53%	47%
Malta	45%	55%
Netherlands	73%	27%
Poland	63%	27%
Portugal	68%	22%
Republic of Cyprus	65%	35%
Romania	58%	42%
Slovakia	53%	47%
Slovenia	70%	30%
Spain	75%	25%
Sweden	63%	27%

Figure 27 - Preparedness against attacks causing IT/OT infra outages or degradation

SECTION 3

Sector view

3. Sector view[1]

3.1 IT spending

Survey Question: What was your organisation's estimated IT budget or spending in Euros for 2024 (including CAPEX and OPEX for hardware, software, internal personnel, contractors, and outsourcing spending)?

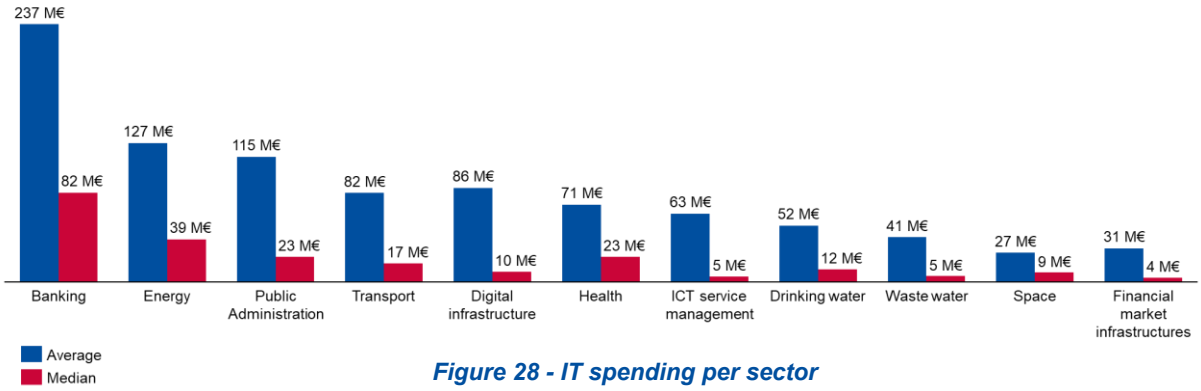


Figure 28 - IT spending per sector

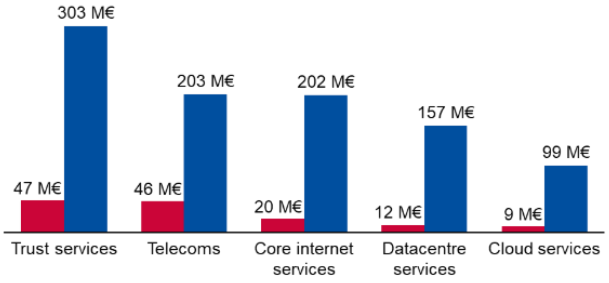


Figure 29 - IT spending, Digital Infrastructure

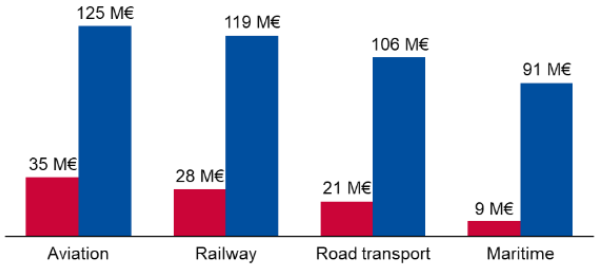


Figure 30 - IT spending, Transport

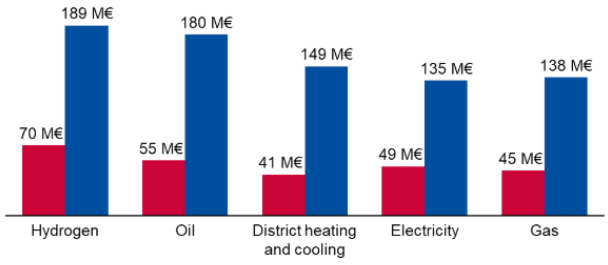


Figure 31 - IT spending, Energy

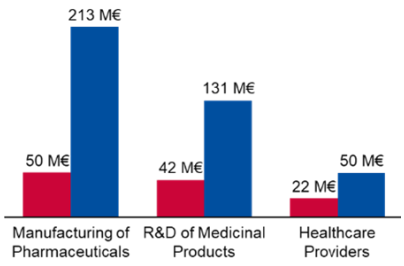


Figure 32 - IT spending, Health

[1] Note: EU reference laboratories are included in the Health sector sample. However, the results for these entities are not shown separately in the breakdown due to their low representation in the sample.

3.2 IT spending as a share of revenues

Calculated field: This metric is a calculated field that expresses the proportion (or percentage) of an organisation's revenue that is allocated to IT.

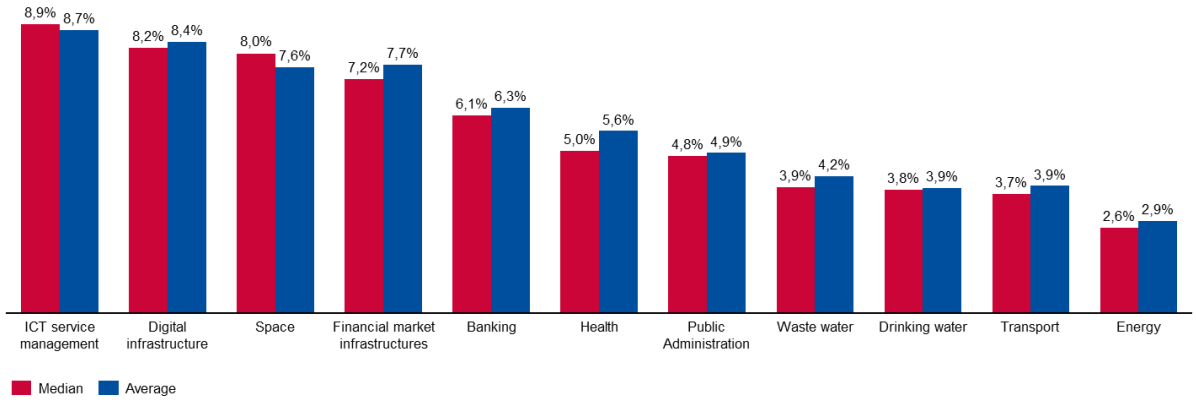


Figure 33 - IT spending as a share of revenues per sector

3.3 IS spending

Survey Question: What was your organisation's estimated Information Security budget or spending in Euros for 2024 (including CAPEX and OPEX for hardware, software, internal personnel, contractors, and outsourcing spending)?

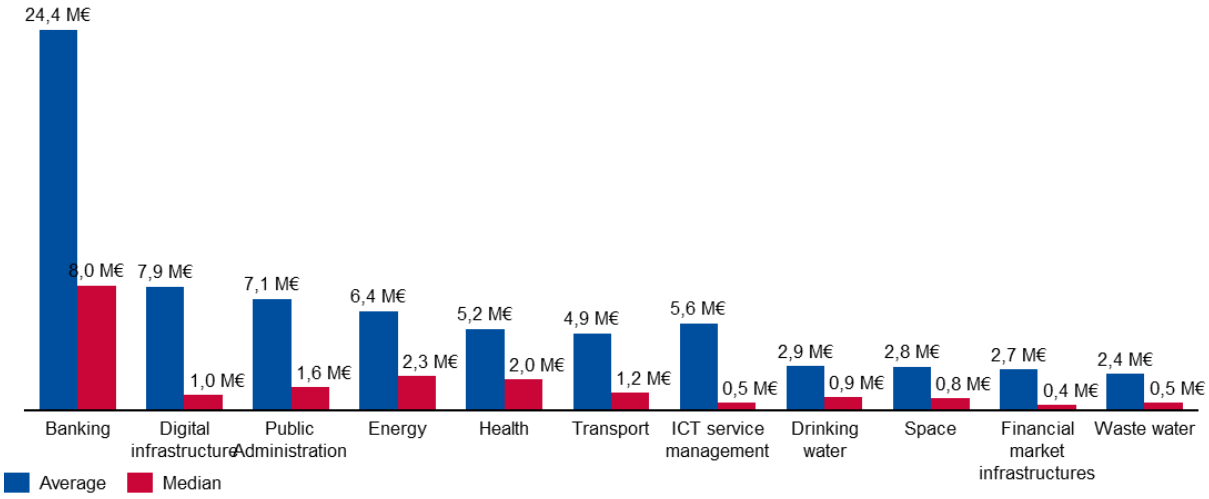


Figure 34 - IS spending per sector

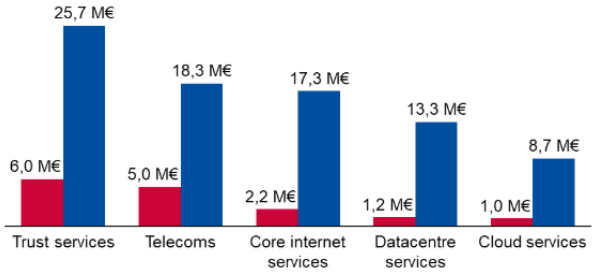


Figure 35 - IS spending, Digital Infrastructure

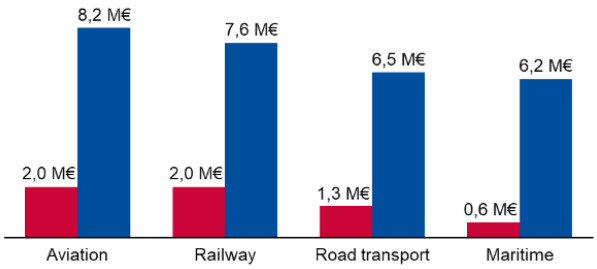


Figure 36 - IS spending, Transport

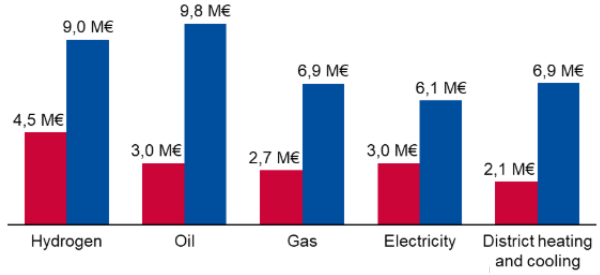


Figure 37 - IS spending, Energy

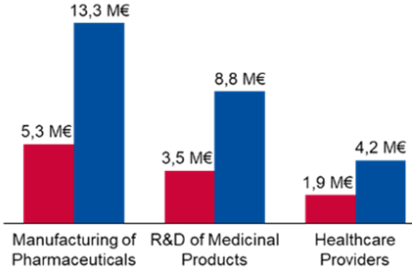


Figure 38 - IS spending, Health

3.4 IS spending as a share of IT spending

Calculated field: This metric is a calculated field that expresses the proportion (or percentage) of an organisation's IS budget or spending compared to its total IT budget or spending.

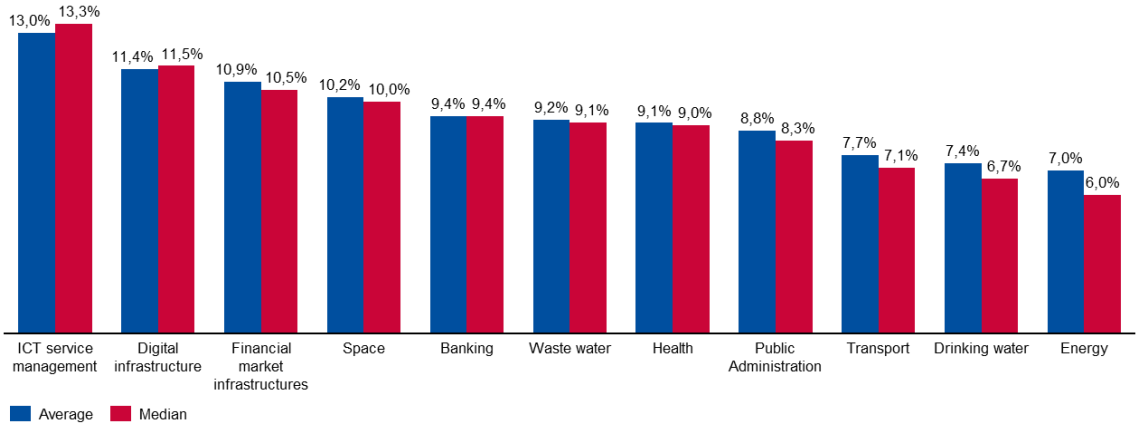


Figure 39 - IS spending as a share of IT spending, per sector

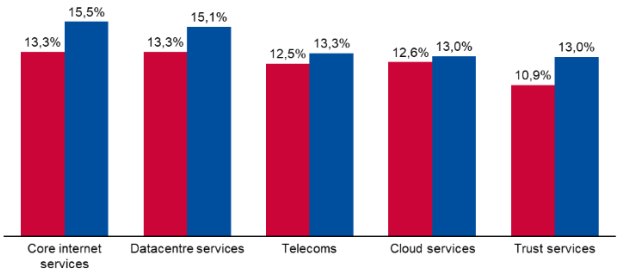


Figure 40 - IS spending, Digital Infrastructure

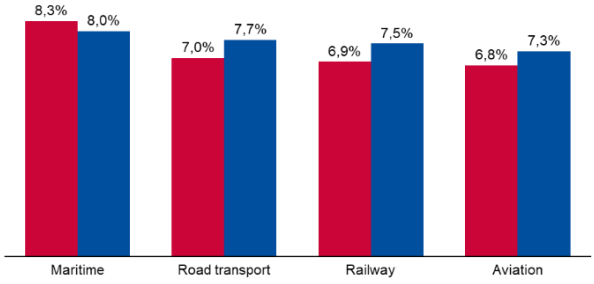


Figure 41 - IS spending, Transport

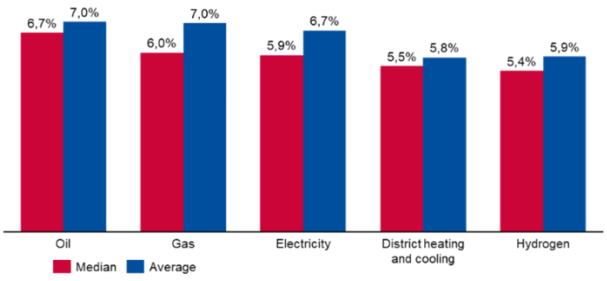


Figure 42 - IS spending, Energy

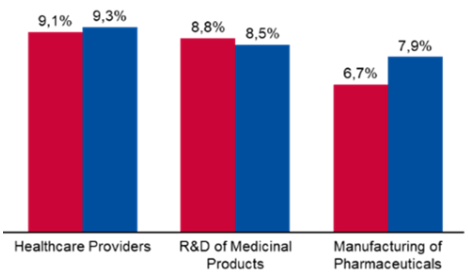


Figure 43 - IS spending, Health

3.5 Outcomes attained via cybersecurity investment in 2024

Survey Question: Which of the following outcomes has your organisation achieved as a result of its cybersecurity investments in the past year? (Select up to three)

Across EU view

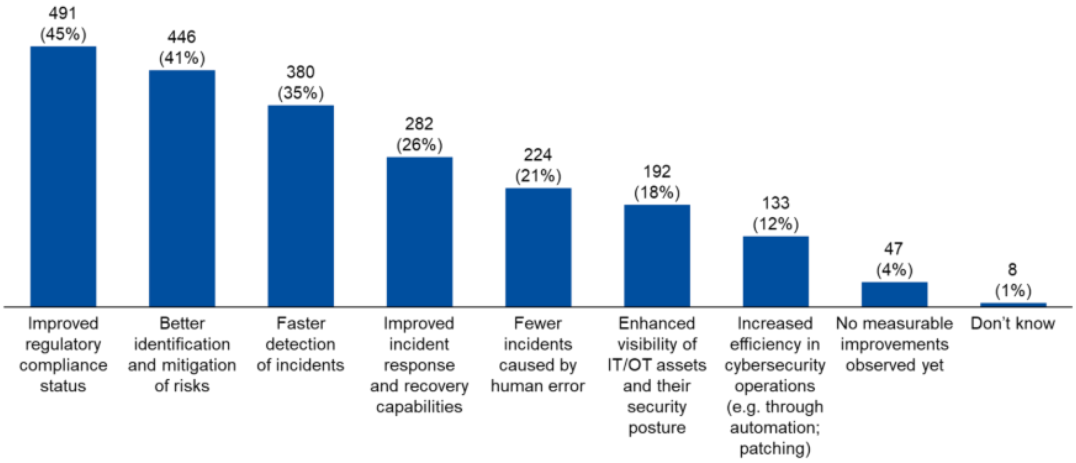


Figure 44 - Outcomes attained via cybersecurity investment in 2024

Sector view

Disclaimer: This graph visualises the proportion that each response represents out of all responses received from organisations within the respective sector. Not the proportion of entities within the respective sector, having provided that answer.

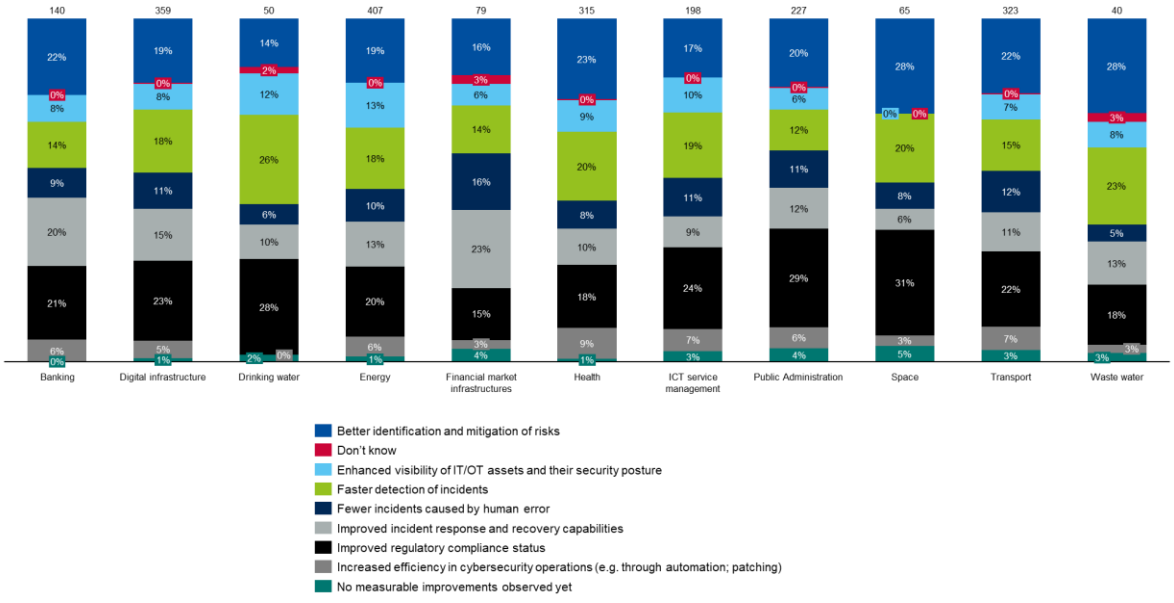


Figure 45 - Outcomes attained via cybersecurity investment in 2024, per sector

3.6 Key cybersecurity investment drivers for 2024

Survey Question: In the past year, which of the following has most significantly driven cybersecurity investment in your organisation? (Select up to 3)

Across EU view

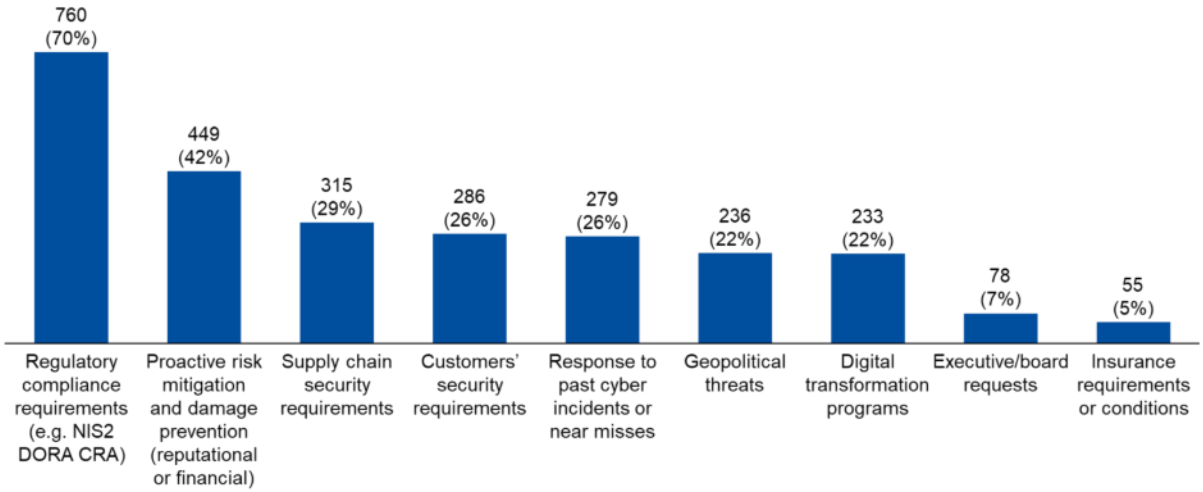


Figure 46 - Key cybersecurity investment drivers for 2024

Sector view

Disclaimer: This graph visualises the proportion that each response represents out of all responses received from organisations within the respective sector. Not the proportion of entities within the respective sector, having provided that answer.

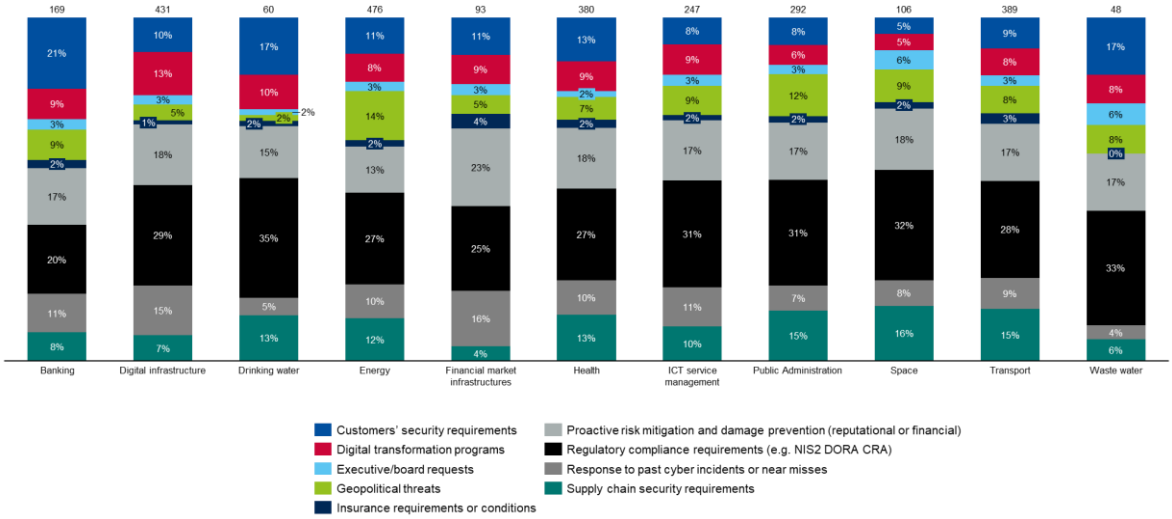


Figure 47 - Key cybersecurity investment drivers for 2024, per sector

3.7 Targeted outcomes of cybersecurity investment in the coming year

Survey Question: Which of the following outcomes are you primarily targeting with your cybersecurity investments in the coming year? (Select up to three)

Across EU view

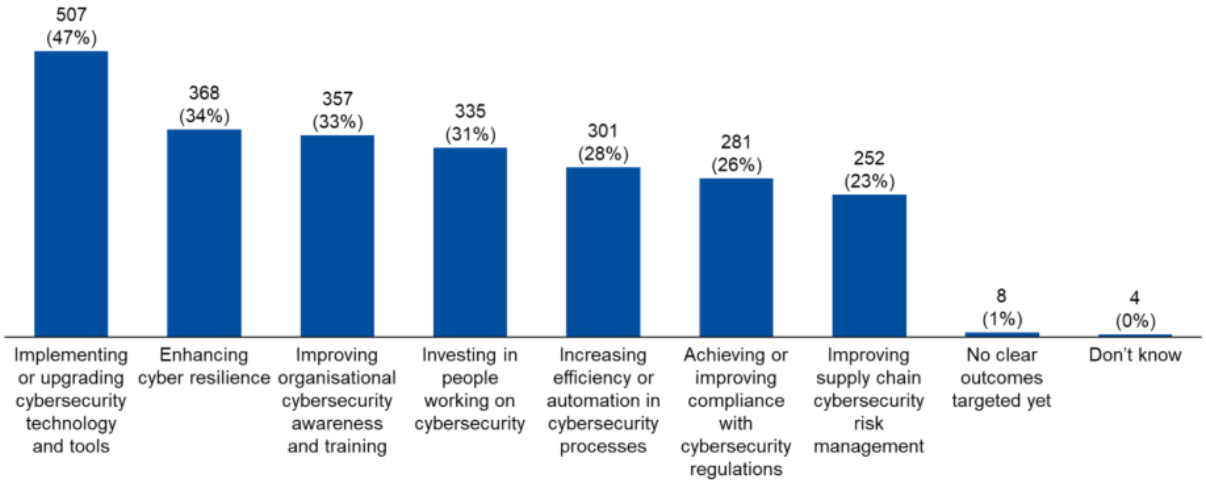


Figure 48 - Targeted outcomes of cybersecurity investment in the coming year

Sector view

Disclaimer: This graph visualises the proportion that each response represents out of all responses received from organisations within the respective sector. Not the proportion of entities within the respective sector, having provided that answer.

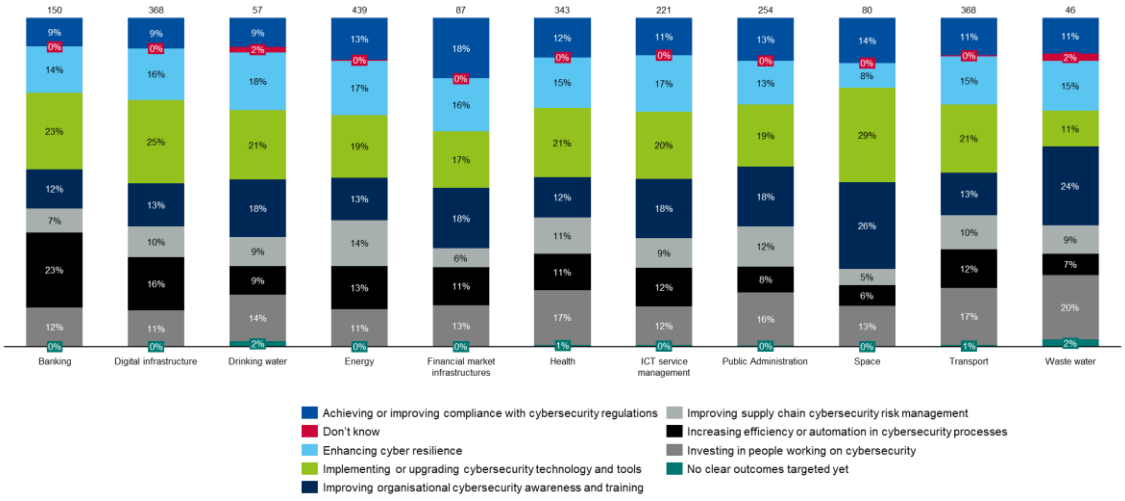


Figure 49 - Targeted outcomes of cybersecurity investment in the coming year, per sector

3.8 IT FTEs

Survey Question: What was your organisation's estimated number of IT FTEs for 2024 including internal staff and contractors?

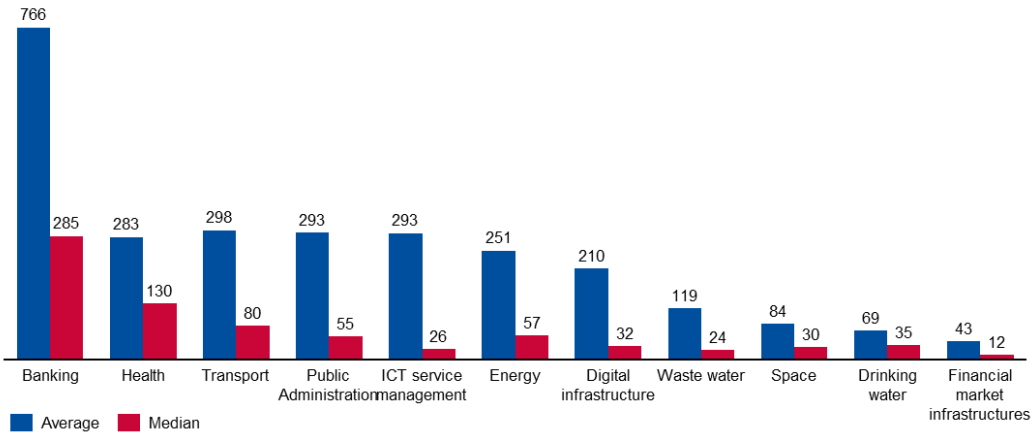


Figure 50 - IT FTEs per sector

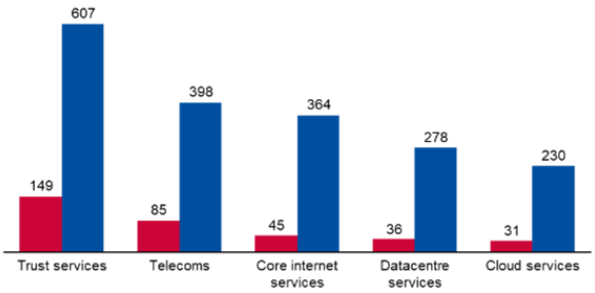


Figure 51 – IT FTEs, Digital Infrastructure

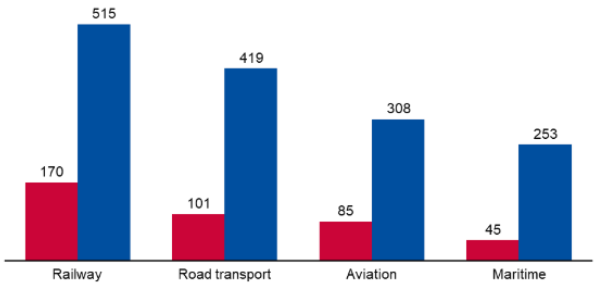


Figure 52 – IT FTEs, Transport

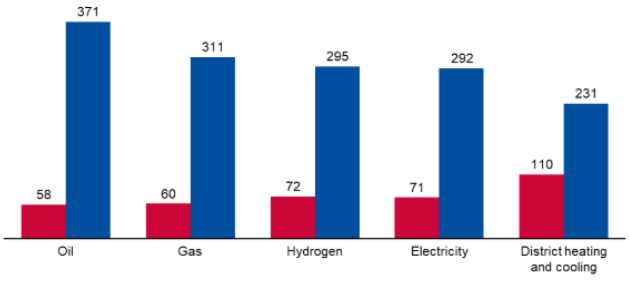


Figure 53 – IT FTEs, Energy

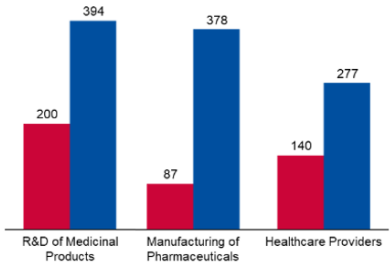


Figure 54 – IT FTEs, Health

3.9 IS FTEs

Survey Question: What was your organisation's estimated number of Information Security FTEs for 2024 including internal staff and contractors?

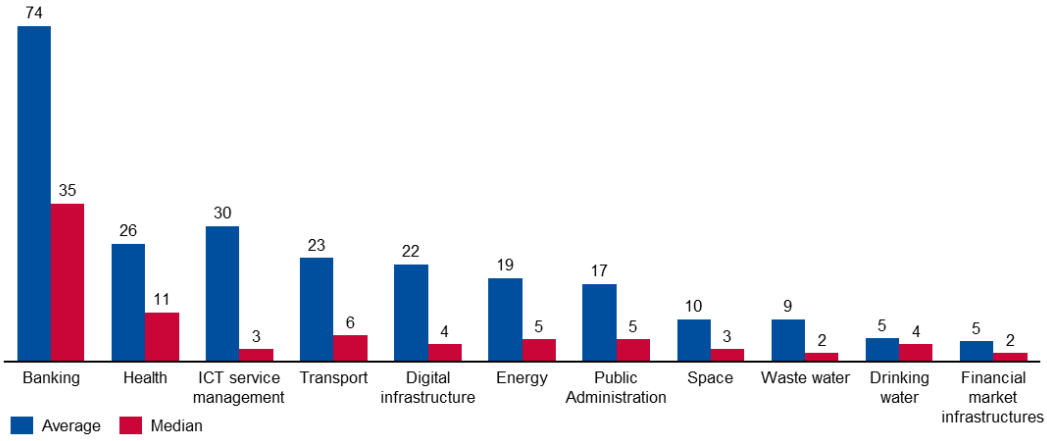


Figure 55 - IS FTEs per sector

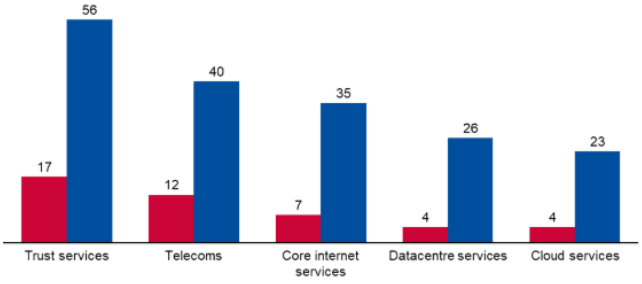


Figure 56 – IS FTEs, Digital Infrastructure

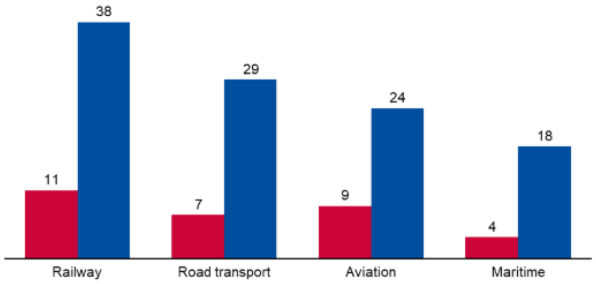


Figure 57 – IS FTEs, Transport

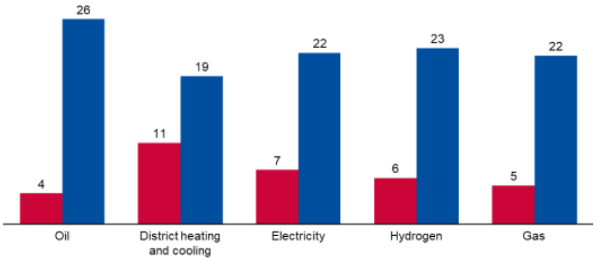


Figure 58 – IS FTEs, Energy

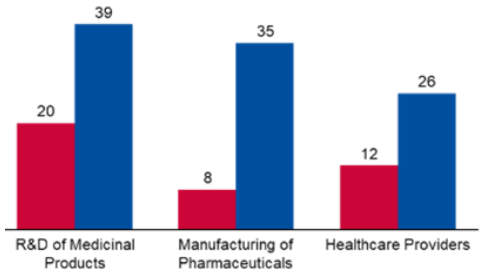


Figure 59 – IS FTEs, Health

3.10 IS FTEs as a share of IT FTEs

Calculated field: This metric is a calculated field that expresses the proportion (or percentage) of an organisation's IS FTEs over IT FTEs.

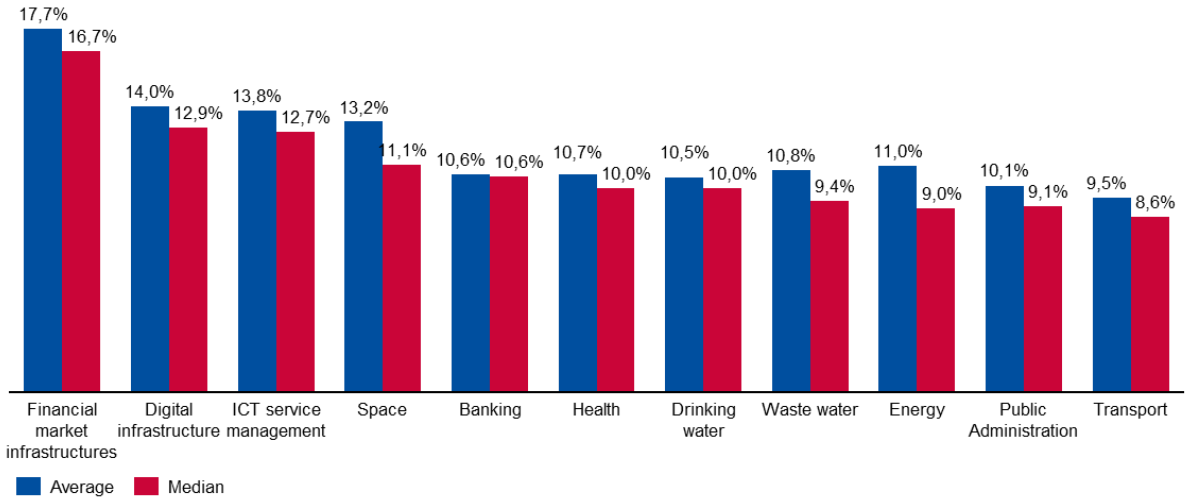


Figure 60 - IS FTEs as a share of IT FTEs per sector

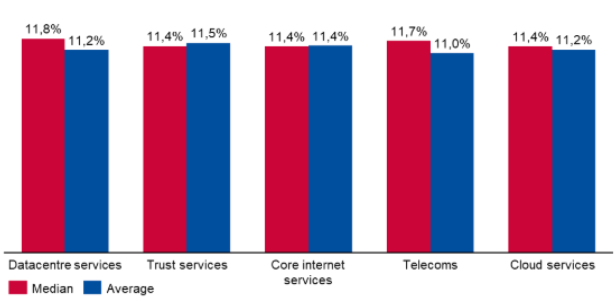


Figure 61 – IS/IT FTEs, Digital Infrastructure

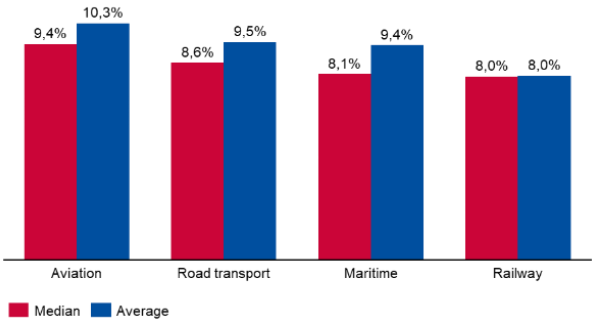


Figure 62 – IS/IT FTEs, Transport

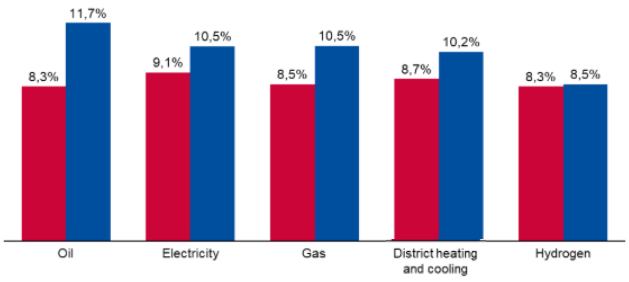


Figure 63 – IS/IT FTEs, Energy

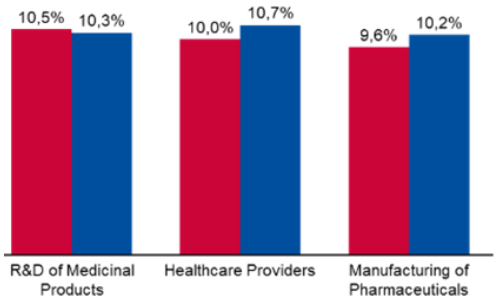


Figure 64 – IS/IT FTEs, Health

3.11 Proportion of women in IS FTEs

Survey Question: Please share what percentage of your IS FTEs are women?

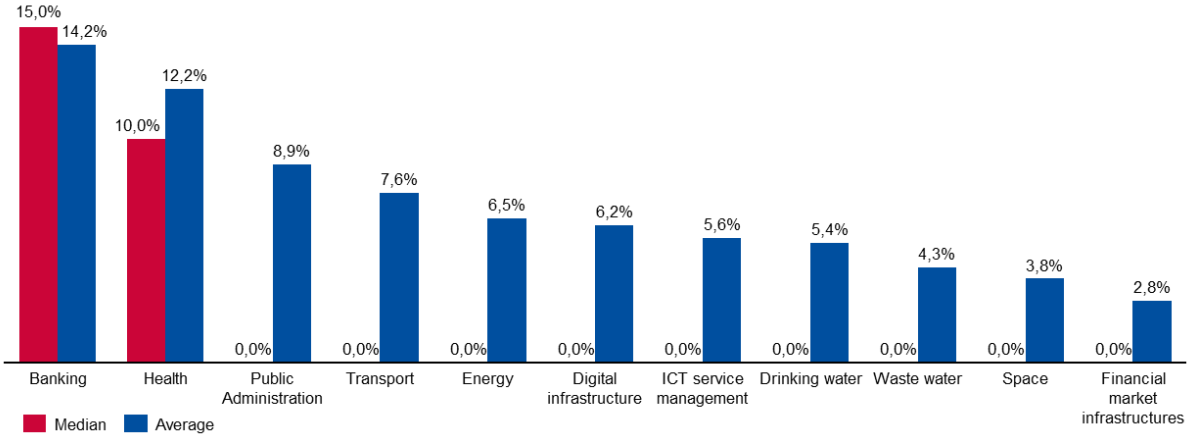


Figure 65 - Proportion of women in IS FTEs per sector

3.12 Challenges to attracting cybersecurity talent

Survey Question: Which barriers does your organisation face in attracting cybersecurity personnel? (Select up to three)

Across EU view

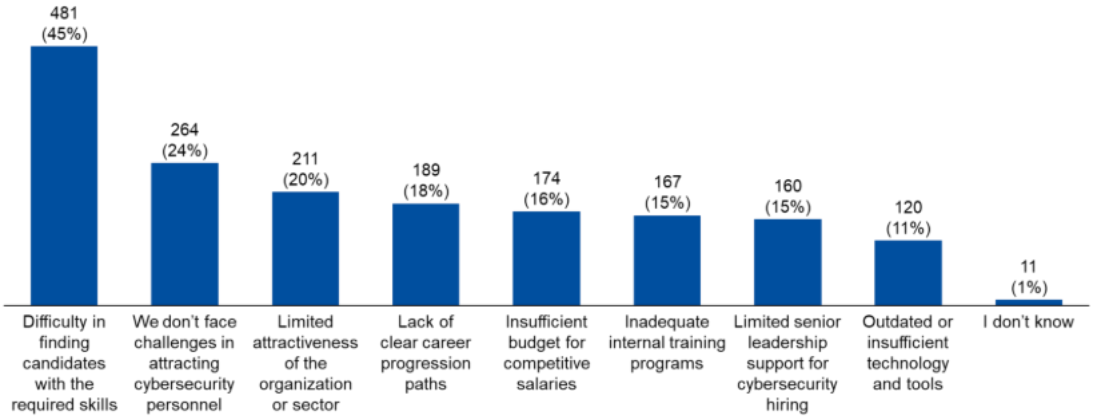


Figure 66 - Challenges to attracting cybersecurity talent

Sector view

Disclaimer: This graph visualises the proportion that each response represents out of all responses received from organisations within the respective sector. Not the proportion of entities within the respective sector, having provided that answer.

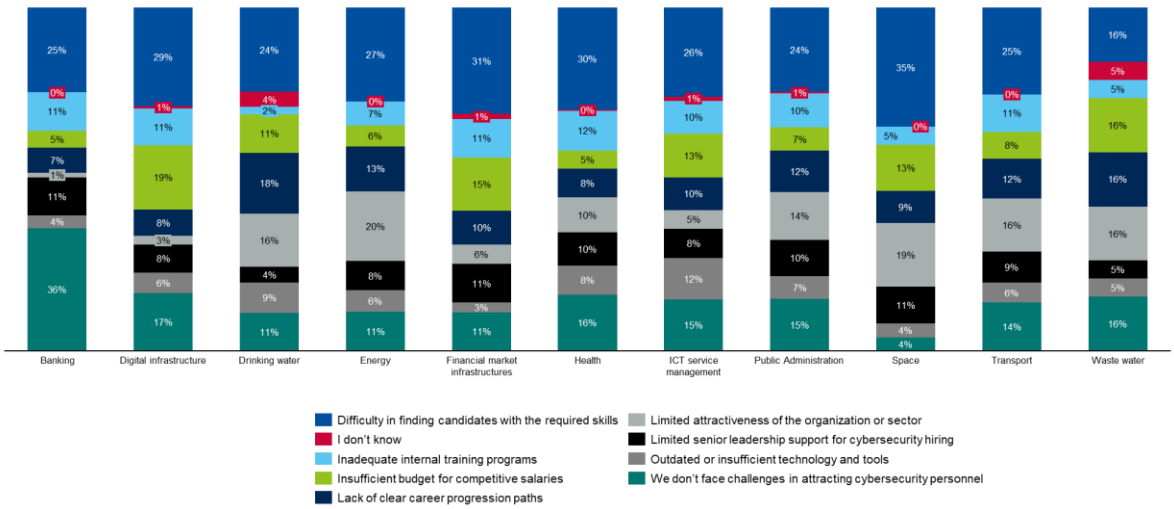


Figure 67 - Challenges to attracting cybersecurity talent, per sector

3.13 Challenges to retaining cybersecurity personnel

Survey Question: What are the main challenges your organisation faces in retaining cybersecurity personnel? (Select up to three)

Across EU view

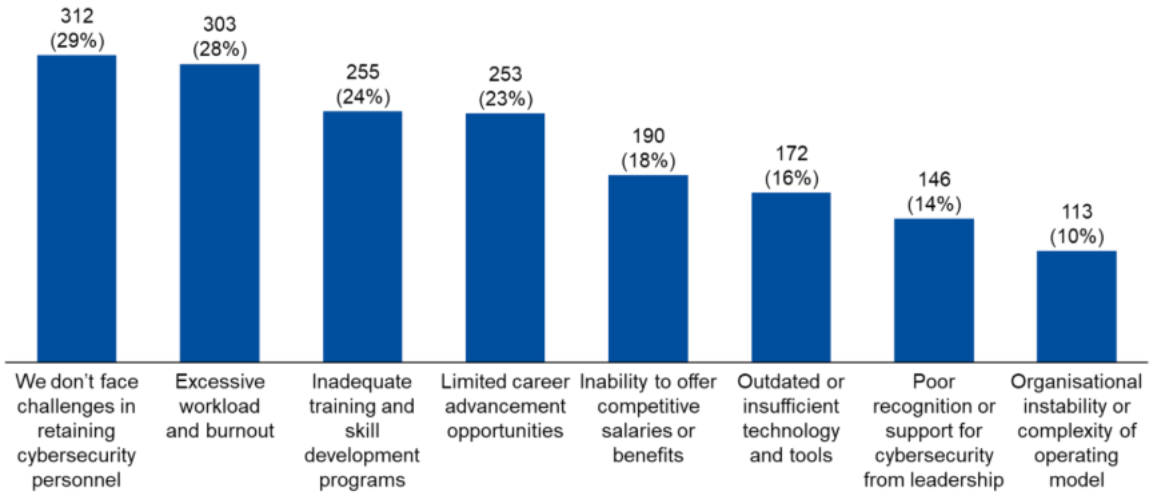


Figure 68 - Challenges to retaining cybersecurity personnel

Sector view

Disclaimer: This graph visualises the proportion that each response represents out of all responses received from organisations within the respective sector. Not the proportion of entities within the respective sector, having provided that answer.

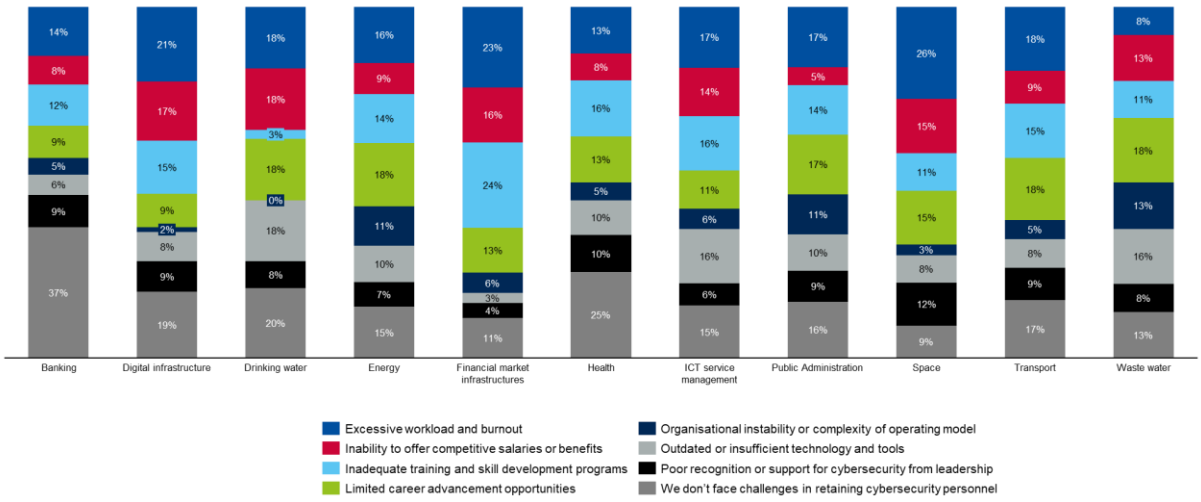


Figure 69 - Challenges to retaining cybersecurity personnel, per sector

3.14 Cybersecurity staffing strategy

Survey Question: What best describes your organisation's cybersecurity staffing plan for the next 12 months?

Across EU view

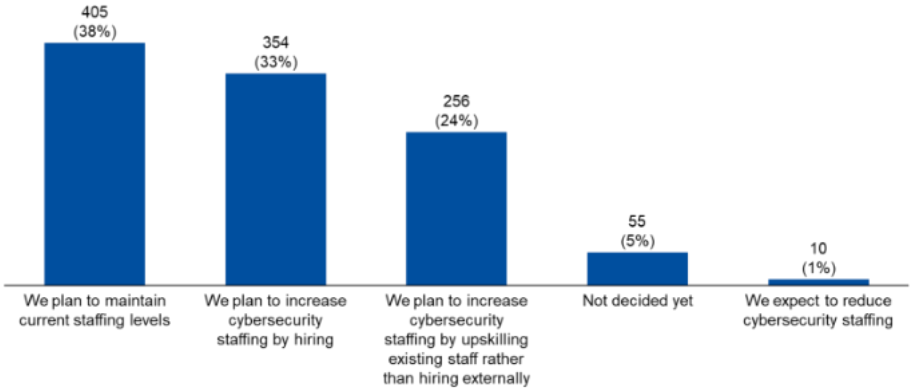


Figure 70 - Cybersecurity staffing strategy

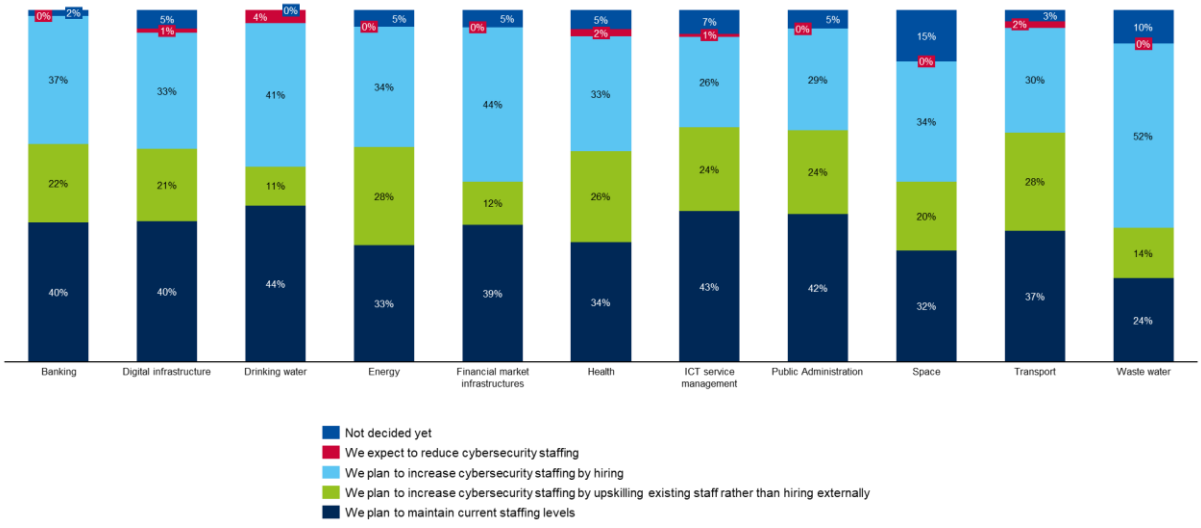


Figure 71 - Cybersecurity staffing strategy, per sector

3.15 Cost reduction measures affecting cybersecurity staffing

Survey Question: In the past year, did your organisation take any of the following cost reduction measures affecting cybersecurity staffing?

Across EU view

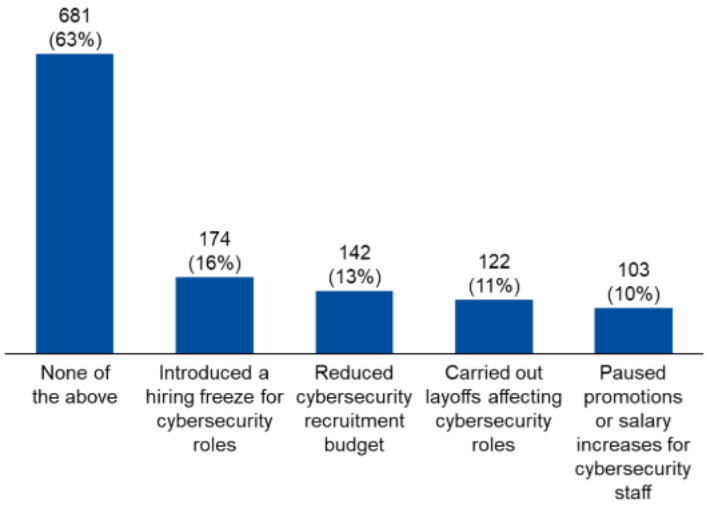


Figure 72 - Cost reduction measures affecting cybersecurity staffing

Sector view

Disclaimer: This graph visualises the proportion that each response represents out of all responses received from organisations within the respective sector. Not the proportion of entities within the respective sector, having provided that answer.

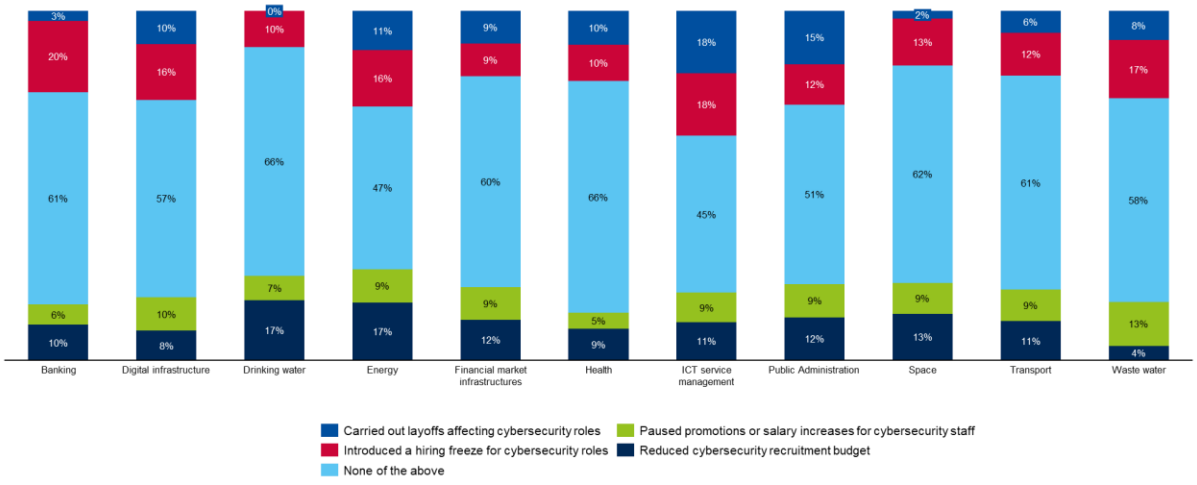


Figure 73 - Cost reduction measures affecting cybersecurity staffing, per sector

3.16 Most in-demand cybersecurity skills currently

Survey Question: Which of the following are the most in-demand cybersecurity skills in your organisation right now? (Select up to 3)

Across EU view

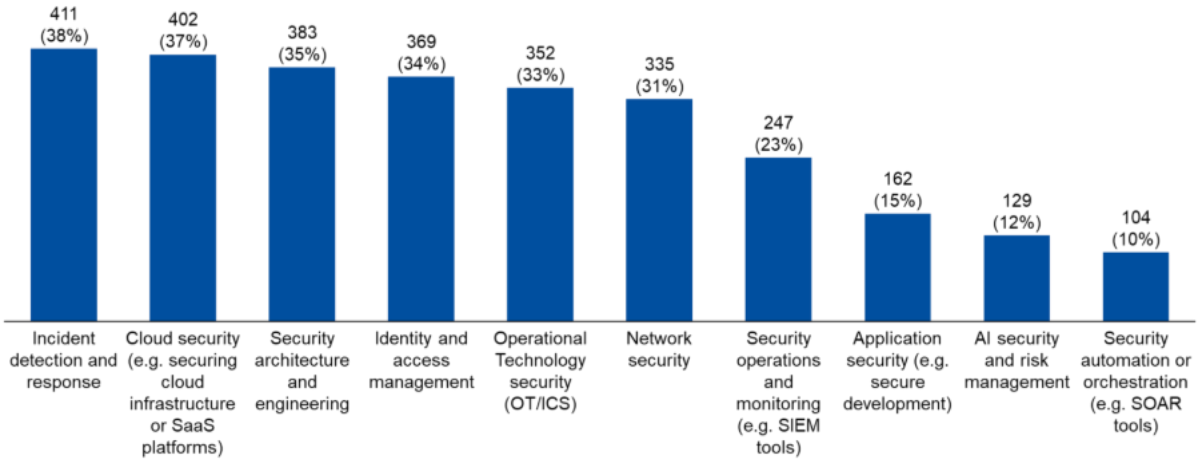


Figure 74 - Most in-demand cybersecurity skills currently

Sector view

Disclaimer: This graph visualises the proportion that each response represents out of all responses received from organisations within the respective sector. Not the proportion of entities within the respective sector, having provided that answer.

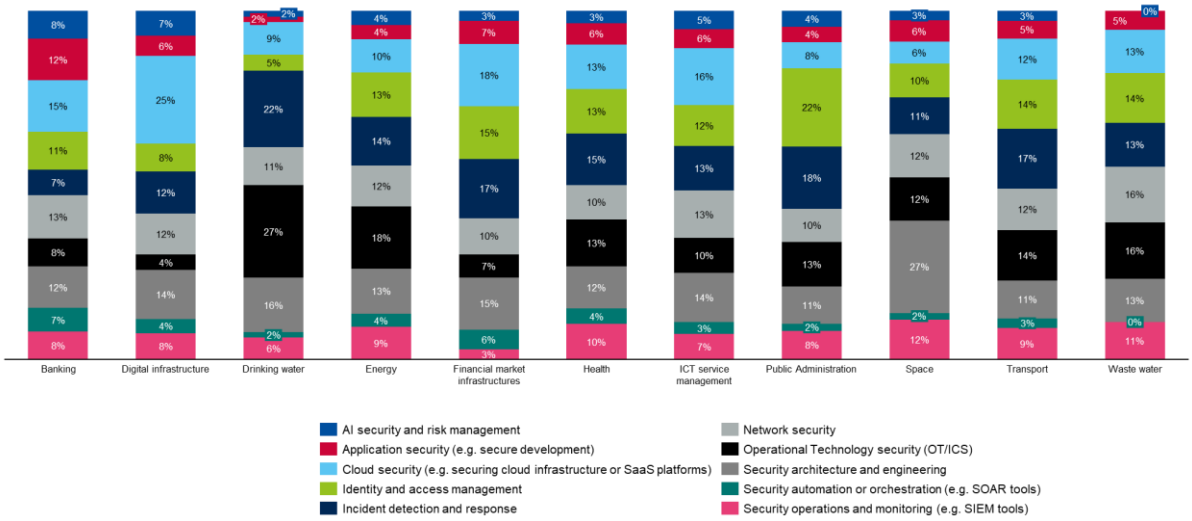


Figure 75 - Most in demand cybersecurity skills currently

3.17 Most challenging NIS2 requirements to implement

Survey Question: Which of the following NIS2 areas is the most challenging for your organisation to implement?

Across EU view

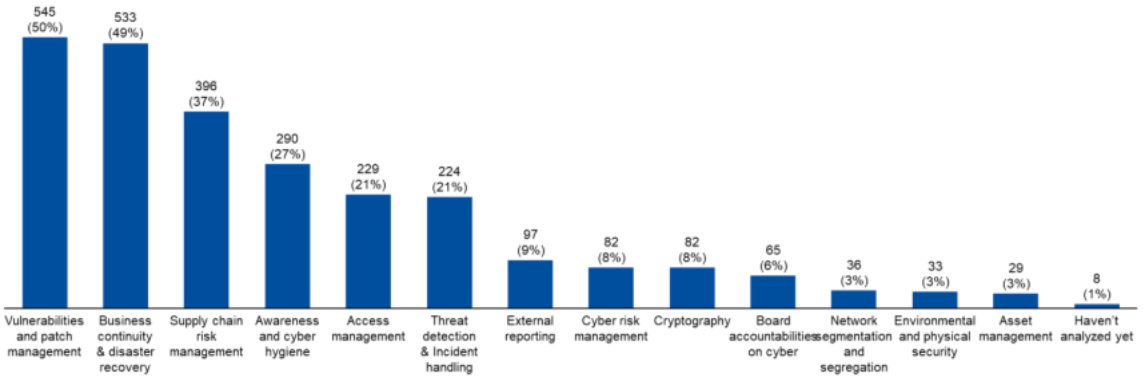


Figure 76 Most challenging NIS2 requirements

Sector view

Disclaimer: This graph visualises the proportion that each response represents out of all responses received from organisations within the respective sector. Not the proportion of entities within the respective sector, having provided that answer.

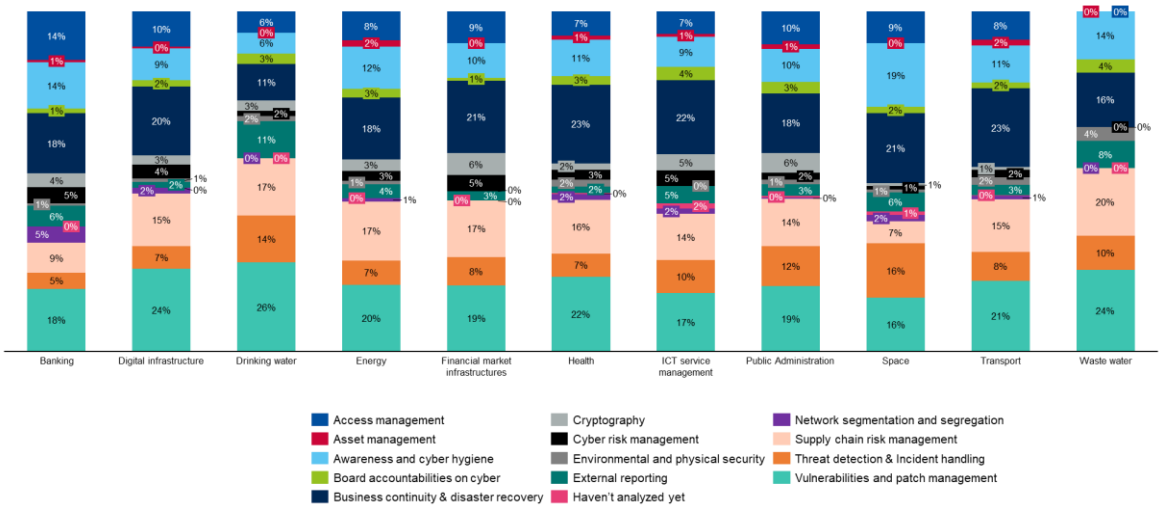


Figure 77 - Most challenging NIS2 requirements, per sector

For detailed breakdown per subsector – please consult the next page.

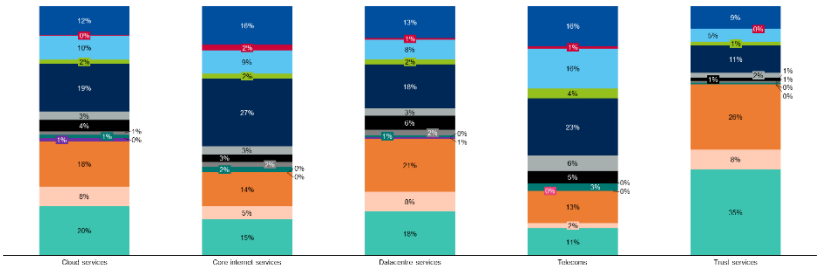


Figure 78 - Most challenging NIS2 requirements, Digital Infrastructure

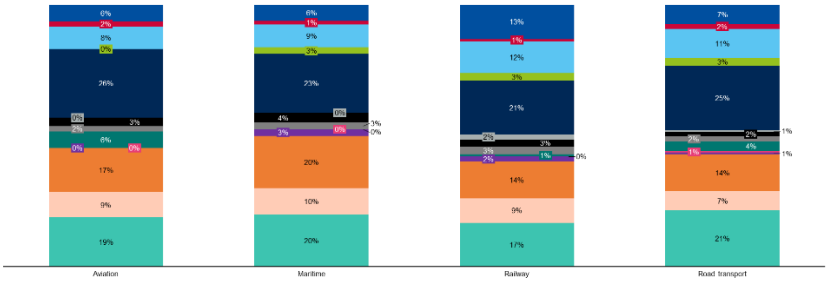


Figure 79 - Most challenging NIS2 requirements, Transport

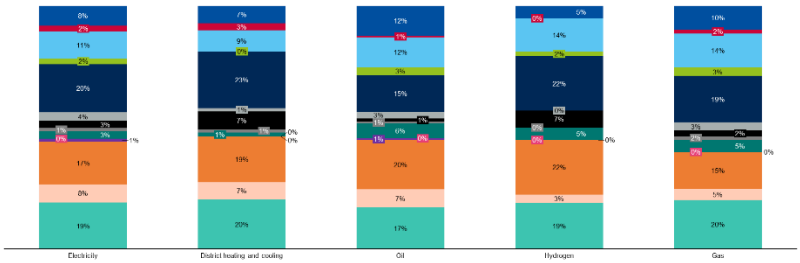


Figure 80 - Most challenging NIS2 requirements, Energy

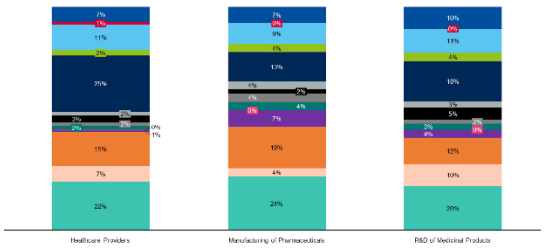
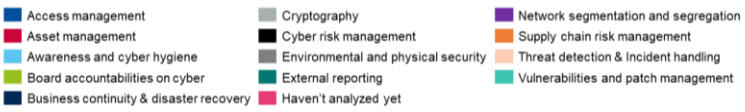


Figure 81 - Most challenging NIS2 requirements, Health



3.18 Main obstacles to implementing NIS2 requirements

Survey Question: What is the main obstacle to implementing these controls effectively?

Across EU view

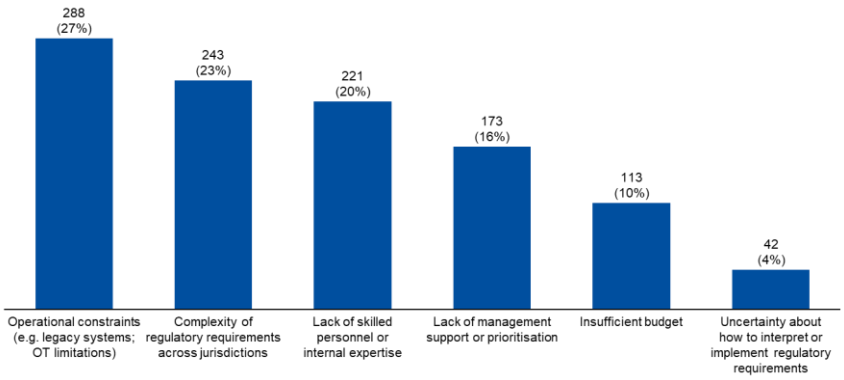


Figure 82 - Main obstacles to implementing NIS2 requirements

Sector view

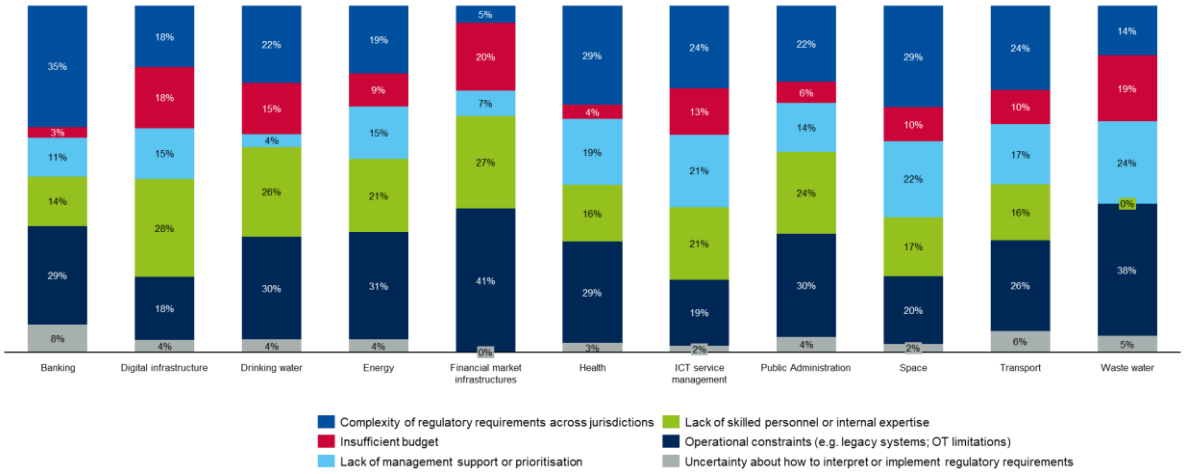


Figure 83 - Main obstacles to implementing NIS2 requirements

For detailed breakdown per subsector – please consult the next page.

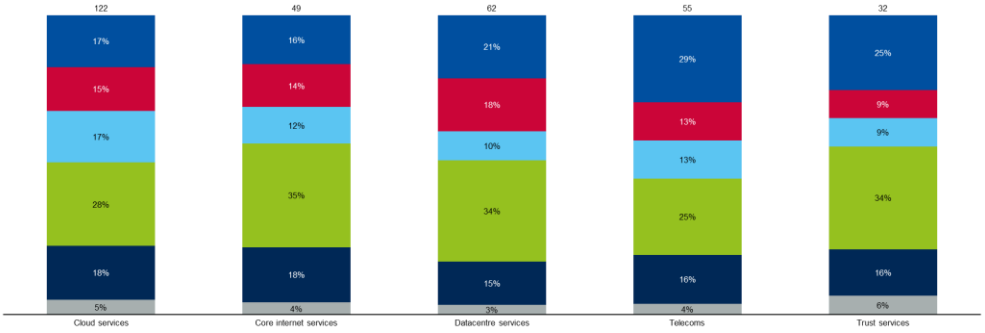


Figure 84 – Main obstacles to implementing NIS2 requirements, Digital Infrastructure

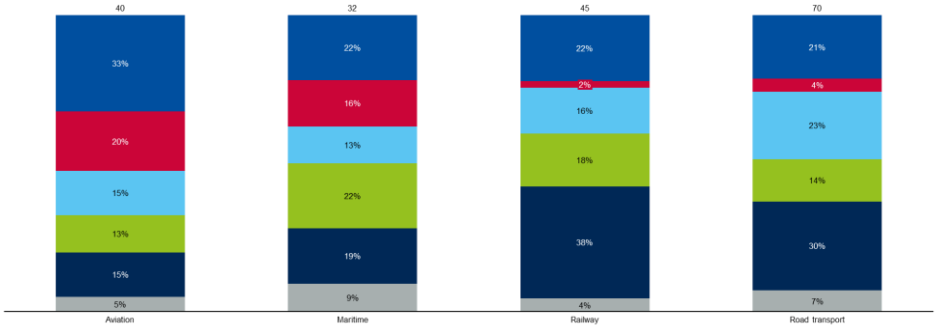


Figure 85 - Main obstacles to implementing NIS2 requirements, Transport

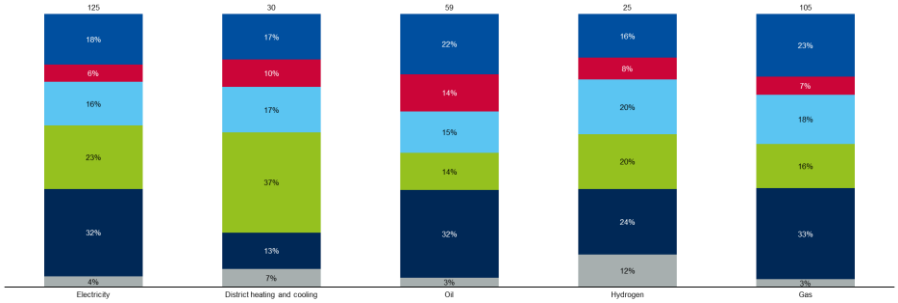


Figure 86 - Main obstacles to implementing NIS2 requirements, Energy

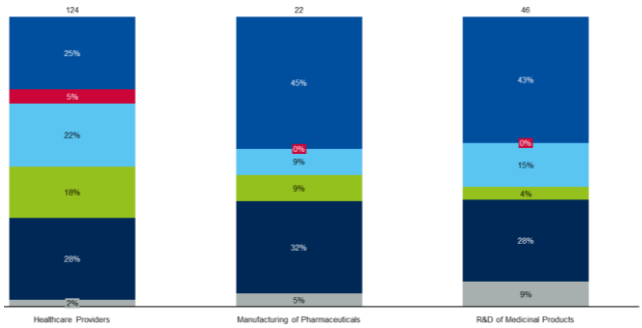
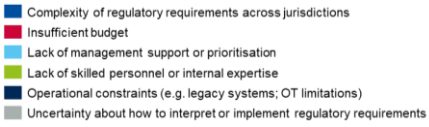


Figure 87 - Main obstacles to implementing NIS2 requirements, Health



3.19 Cybersecurity assessments

Survey Question: Has your organisation conducted any form of cybersecurity assessment or testing (e.g. technical audit, penetration test, red team exercise, maturity assessment) within the past 12 months?

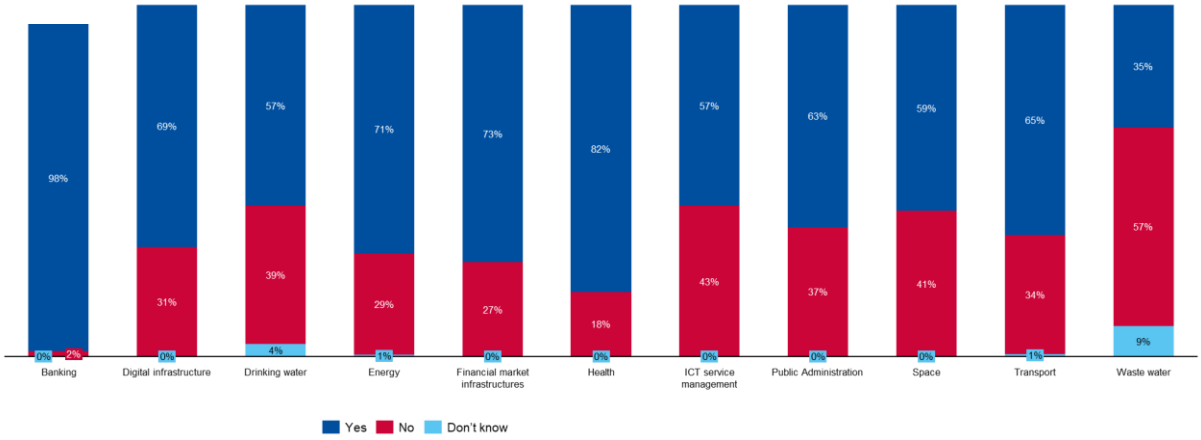


Figure 88 - Proportion of entities having conducted any form of cybersecurity assessment in the past 12 months, per sector

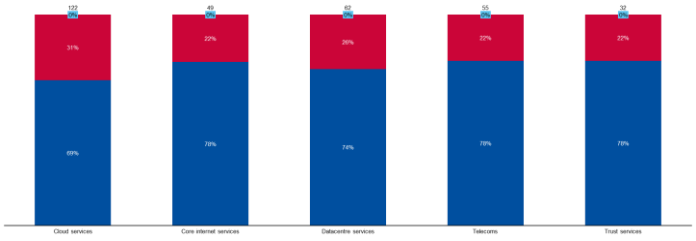


Figure 89 – Cybersecurity assessments, Digital Infrastructure

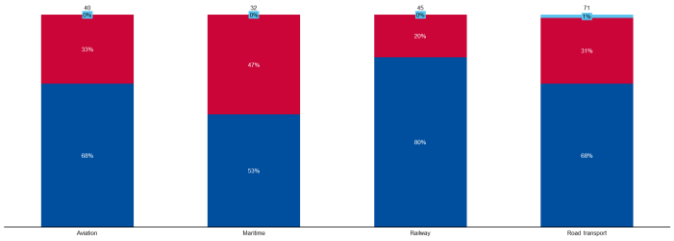


Figure 90 - Cybersecurity assessments, Transport

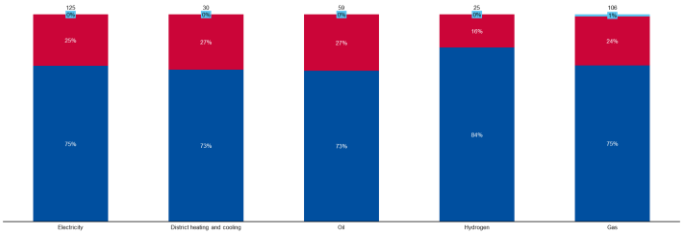


Figure 91 - Cybersecurity assessments, Energy

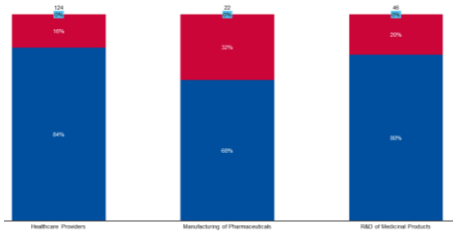


Figure 92 - Cybersecurity assessments, Health

3.20 Average time to patch critical vulnerabilities on critical systems

Survey Question: What is the average time to patch critical vulnerabilities on your organisation's critical assets (IT and OT)?

Across EU view

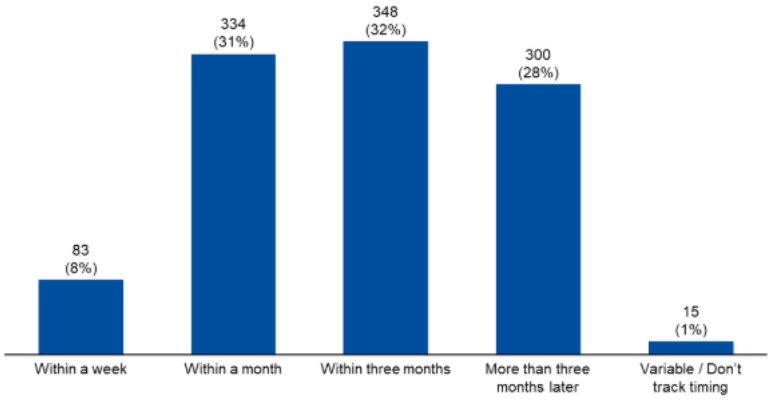


Figure 93 - Average time to patch critical vulnerabilities on critical systems

Sector view

Figure 94 - Average time to patch critical vulnerabilities on critical systems, per sector

For detailed breakdown per subsector – please consult the next page.

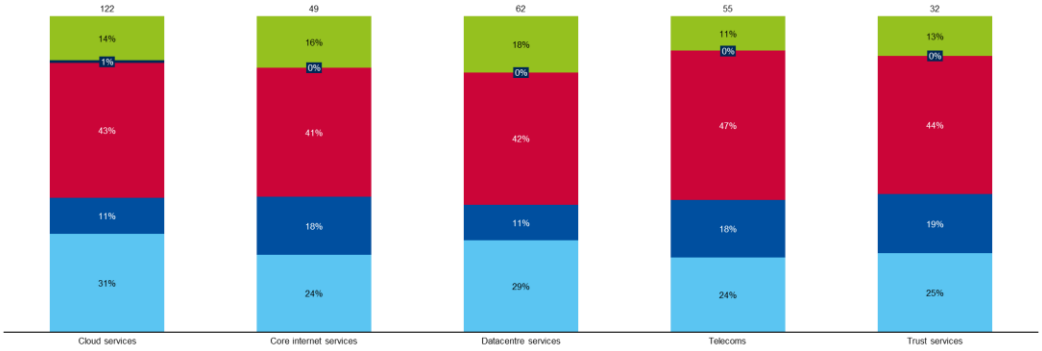


Figure 95 – Average time to patch, Digital Infrastructure

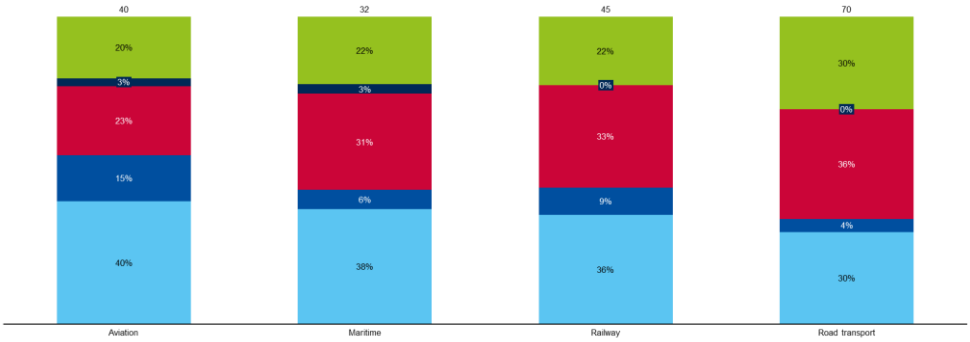


Figure 96 - Average time to patch, Transport

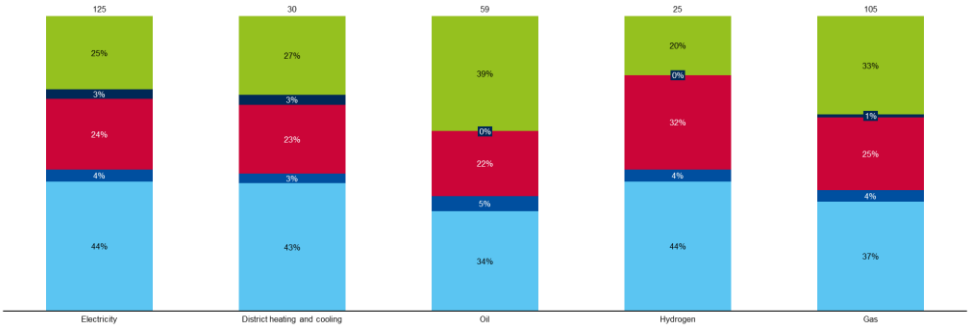


Figure 97 - Average time to patch, Energy

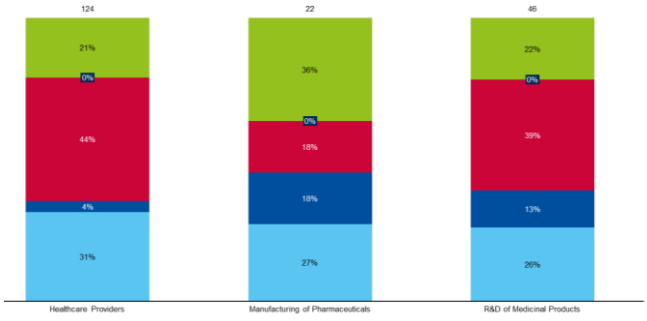
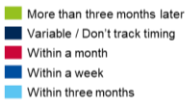


Figure 98 - Average time to patch, Health



3.21 Supply chain risk management practices implemented

Survey Question: Which of the following supply chain risk management practices are currently in place in your organisation?

Across EU view

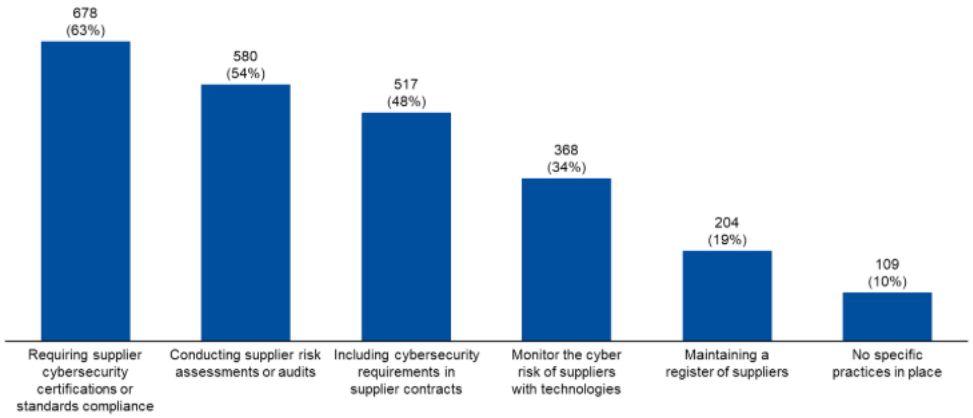


Figure 99 - Supply chain risk management practices implemented

Sector view

Disclaimer: This graph visualises the proportion that each response represents out of all responses received from organisations within the respective sector. Not the proportion of entities within the respective sector, having provided that answer.

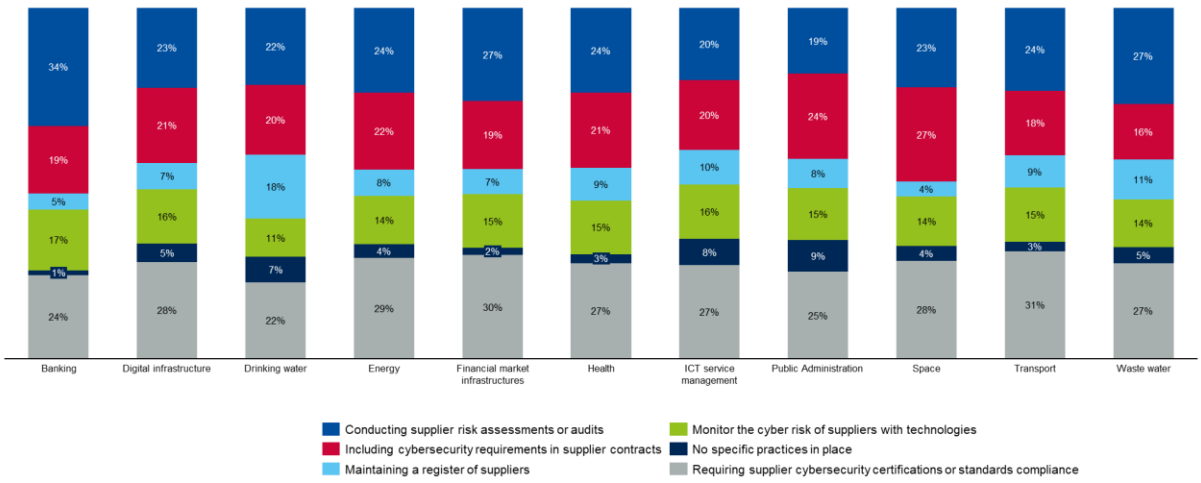


Figure 100 - Supply chain risk management practices implemented, per sector

3.22 Characteristics of preferred suppliers of digital products

Survey Question: When procuring products with digital elements (hardware or software), which supplier categories do you commonly use? (Select all that apply)

Across EU view

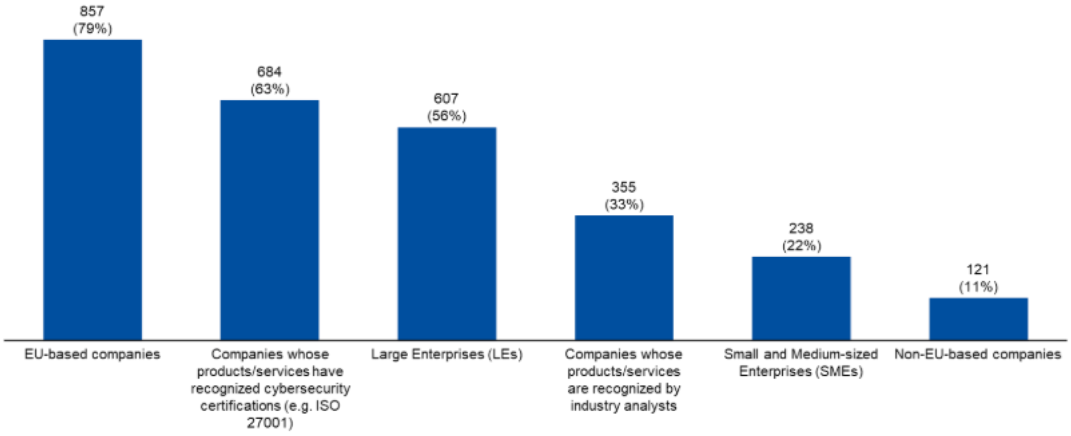


Figure 101 - Characteristics of preferred suppliers of products with digital elements

Sector view

Disclaimer: This graph visualises the proportion that each response represents out of all responses received from organisations within the respective sector. Not the proportion of entities within the respective sector, having provided that answer.

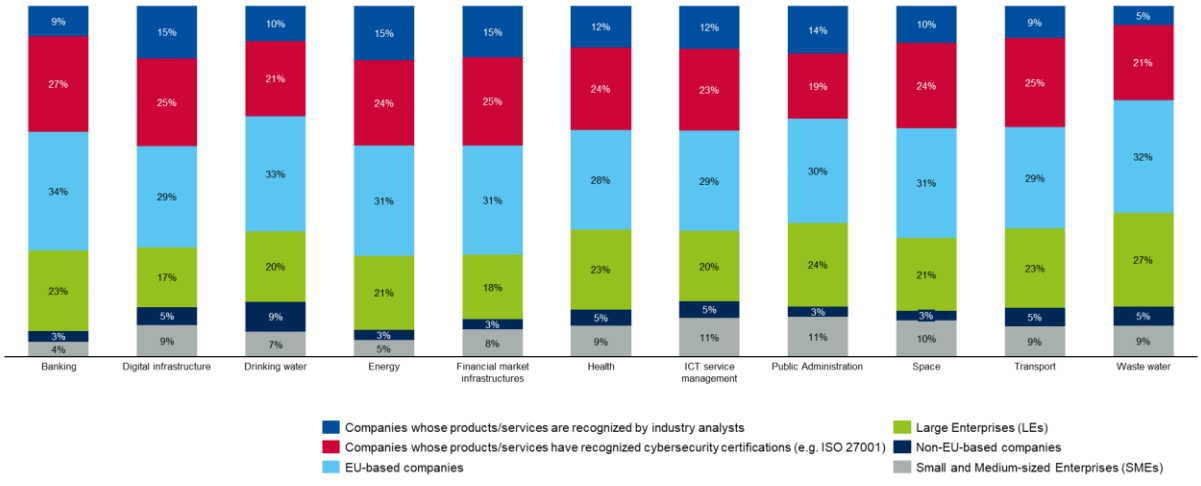


Figure 102 - Characteristics of preferred suppliers of products with digital elements

3.23 Information Sharing

Survey Question: Does your organisation engage in collaboration and information sharing with others? **(Multiple choices possible)**

Across EU view

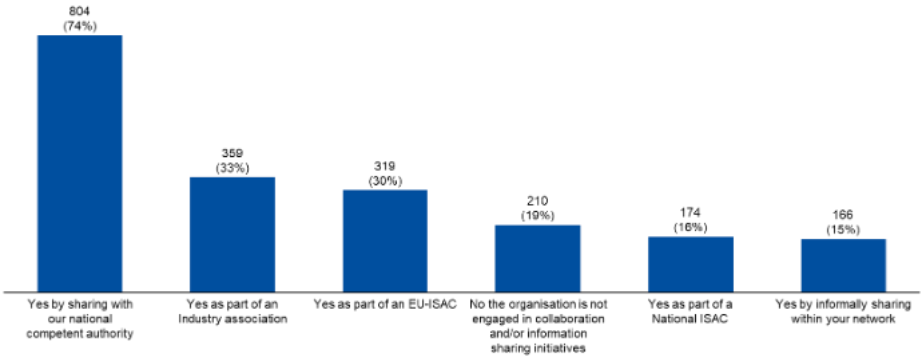


Figure 103 - Participation in information sharing

Sector view

Disclaimer: This graph visualises the proportion that each response represents out of all responses received from organisations within the respective sector. Not the proportion of entities within the respective sector, having provided that answer.

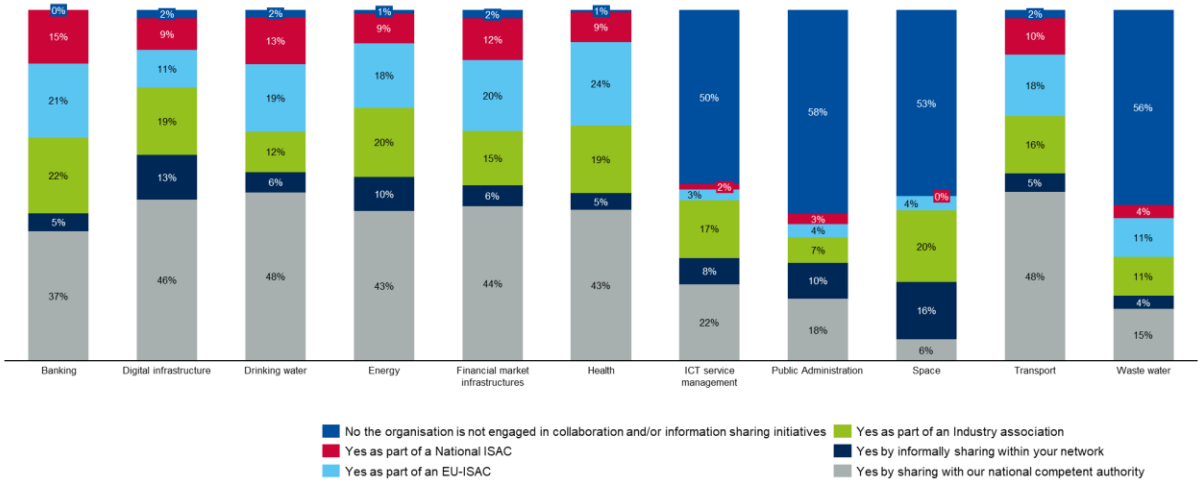


Figure 104 - Participation in information sharing, per sector

3.24 Attacks with the greatest operational impact on day-to-day operations

Survey Question: In the past 12 months, which type of cyberattack had the greatest impact on your day-to-day operations?

Across EU view

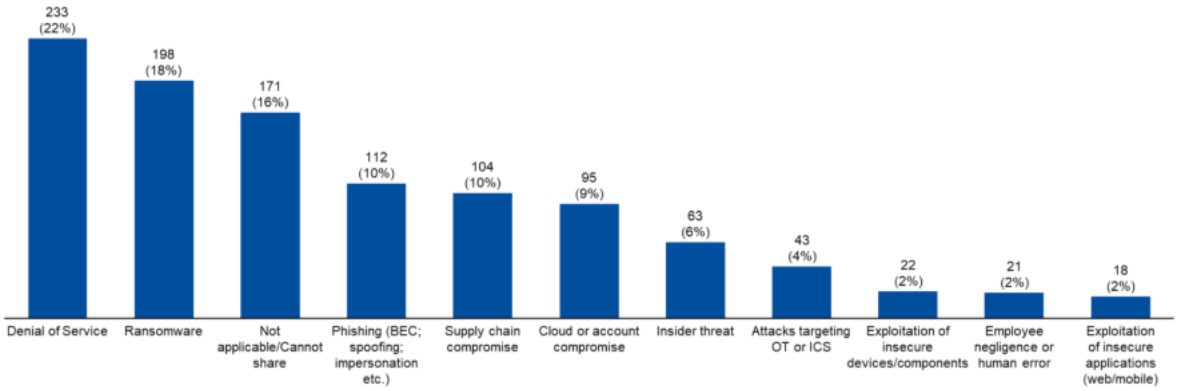


Figure 105 - Attacks with the greatest operational impact on day-to-day operations

Sector view

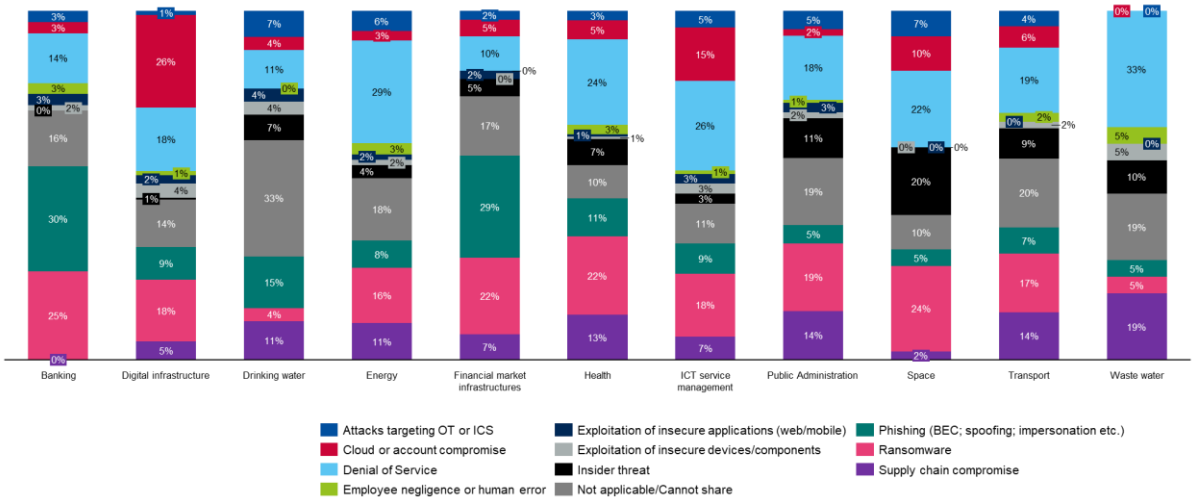


Figure 106 - Attacks with the greatest operational impact on day-to-day operations, per sector

3.25 Cybersecurity threats of most concern looking ahead

Survey Question: Which of the following cybersecurity risks or attack types concern you the most looking ahead? (Select up to 3)

Across EU view

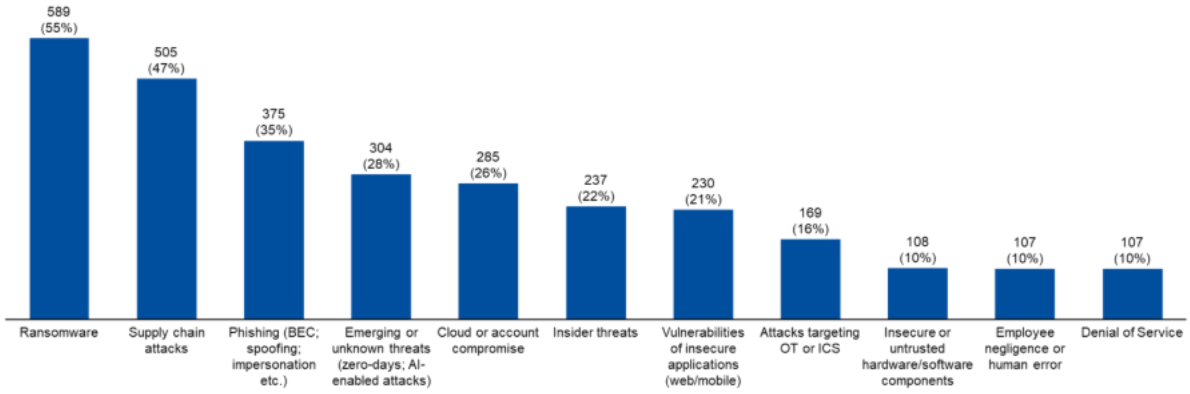


Figure 107 - Cybersecurity threats of most concern looking ahead

Sector view

Disclaimer: This graph visualises the proportion that each response represents out of all responses received from organisations within the respective sector. Not the proportion of entities within the respective sector, having provided that answer.

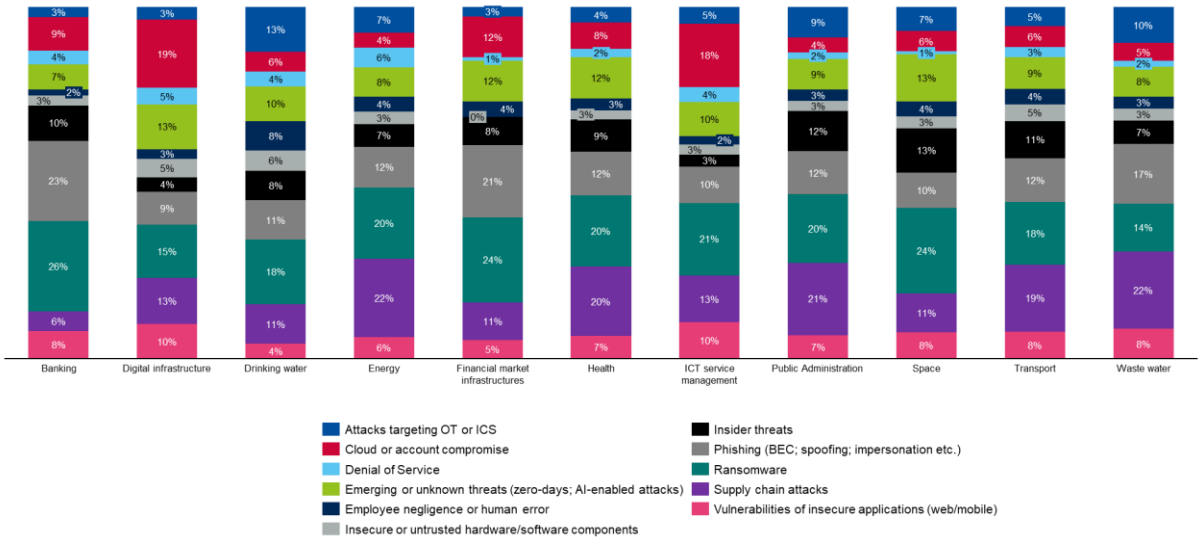


Figure 108 - Cybersecurity threats of most concern looking ahead, per sector

3.26 Preparedness against scenarios

Survey Question: For each of the following scenarios, would you categorize your organization's current stance as predominantly prepared or unprepared? –

(Cybersecurity preparedness refers to your organisation's ability to anticipate, prevent, respond to, and recover from cyber incidents effectively)

A ransomware attack that encrypts critical systems

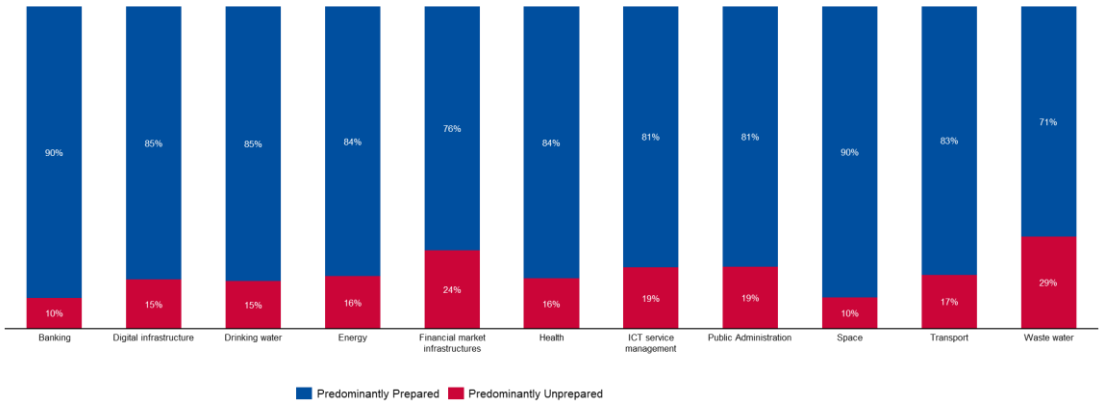


Figure 109 - Preparedness against ransomware, per sector

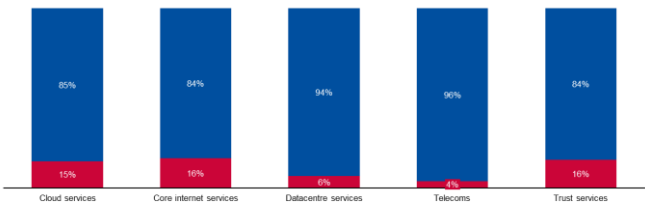


Figure 110 - Preparedness against ransomware, Digital Infrastructure

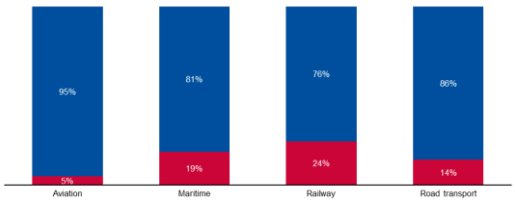


Figure 111 - Preparedness against ransomware, Transport

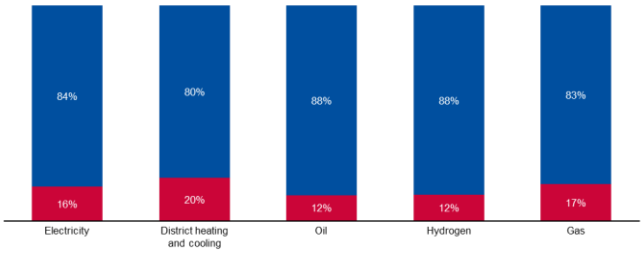


Figure 112 - Preparedness against ransomware, Energy

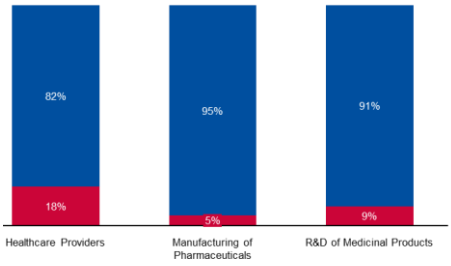


Figure 113 - Preparedness against ransomware, Health

Survey Question: For each of the following scenarios, would you categorize your organization's current stance as predominantly prepared or unprepared? –

A supply chain attack or compromise to a third-party service

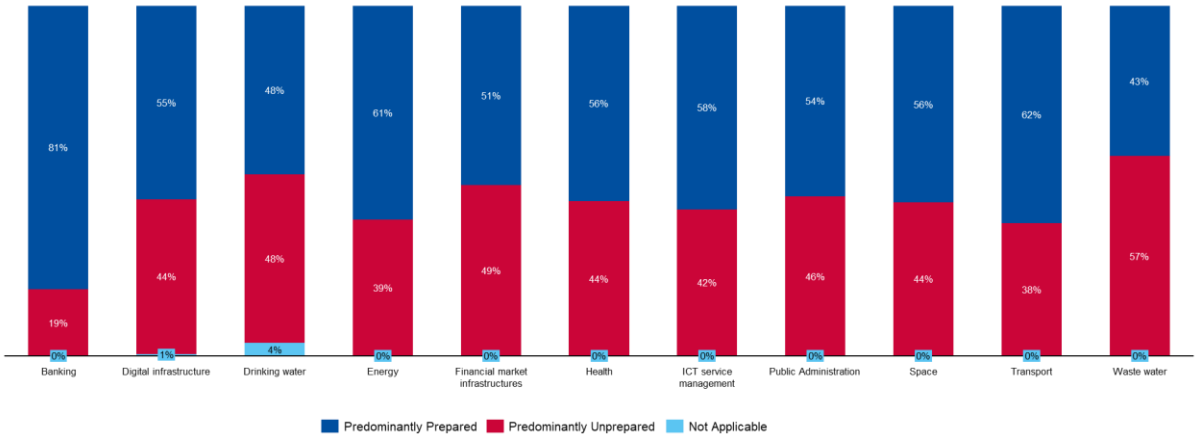


Figure 114 - Preparedness against supply chain attack or third-party compromise

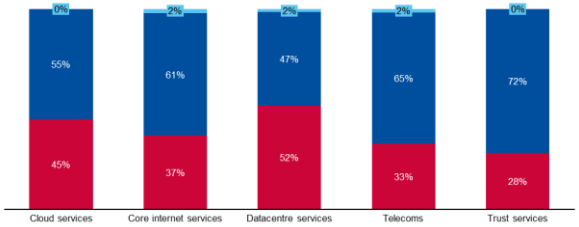


Figure 115 - Preparedness against supply chain attack or third-party compromise, Digital Infrastructure

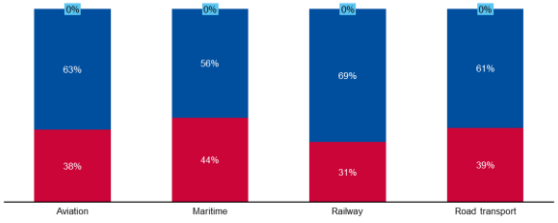


Figure 116 - Preparedness against supply chain attack or third-party compromise, Transport

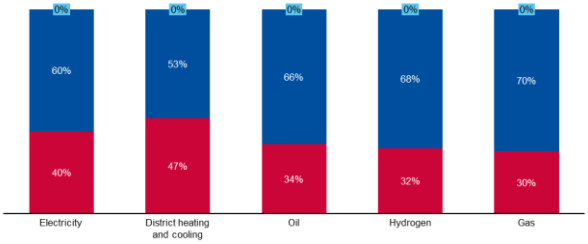


Figure 117 - Preparedness against supply chain attack or third-party compromise, Energy

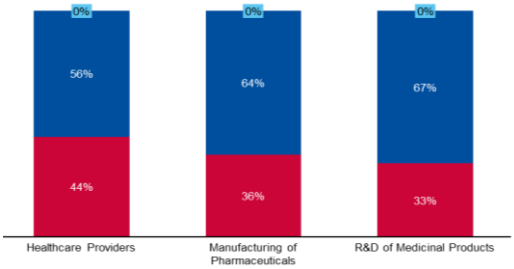


Figure 118 - Preparedness against supply chain attack or third-party compromise, Health

Survey Question: For each of the following scenarios, would you categorize your organization's current stance as predominantly prepared or unprepared? –

A cyberattack causes IT/OT infrastructure outage or degradation

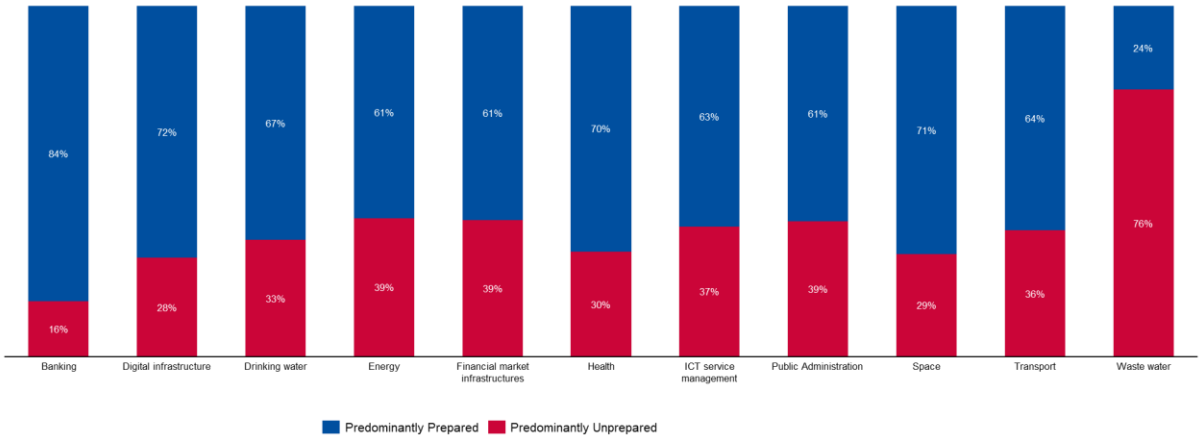


Figure 119 - Preparedness against attacks causing IT/OT infra outages or degradation, per sector

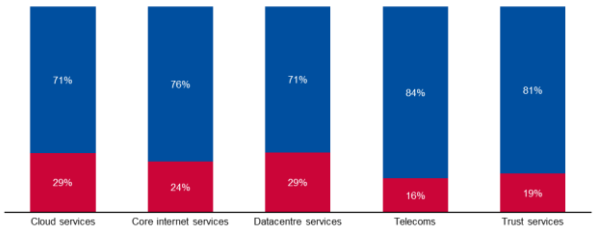


Figure 120 - Preparedness against attacks causing IT/OT infra outages or degradation, Digital Infrastructure

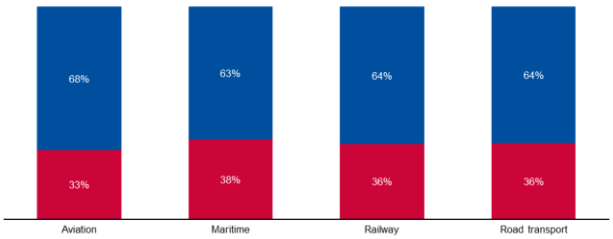


Figure 121 - Preparedness against attacks causing IT/OT infra outages or degradation, Transport

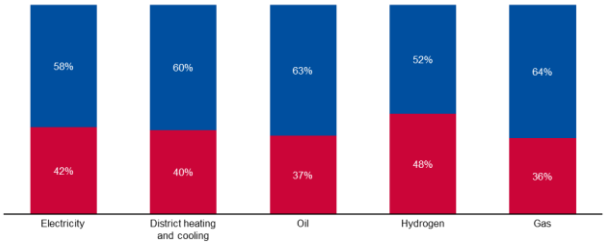


Figure 122 - Preparedness against attacks causing IT/OT infra outages or degradation, Energy

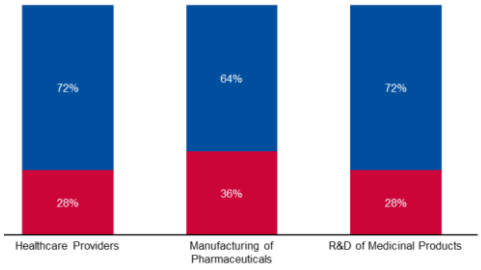


Figure 123 - Preparedness against attacks causing IT/OT infra outages or degradation, Health

SECTION 4

Survey demographics

4. Survey demographics

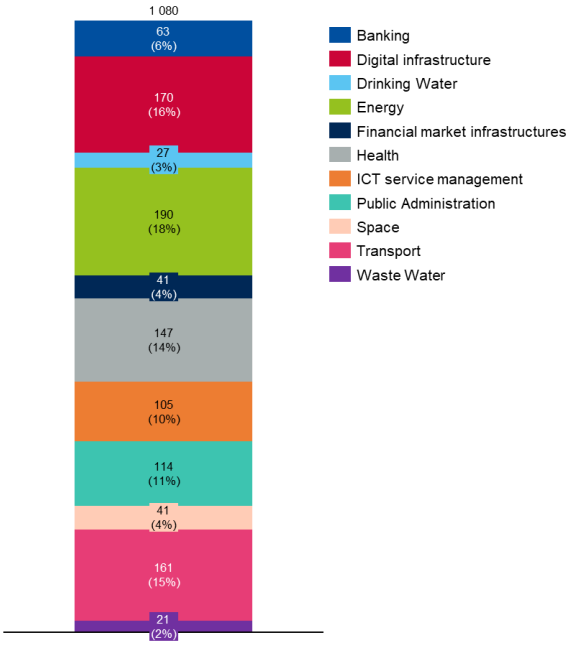


Figure 124 - Sectoral composition of the 2025 study sample

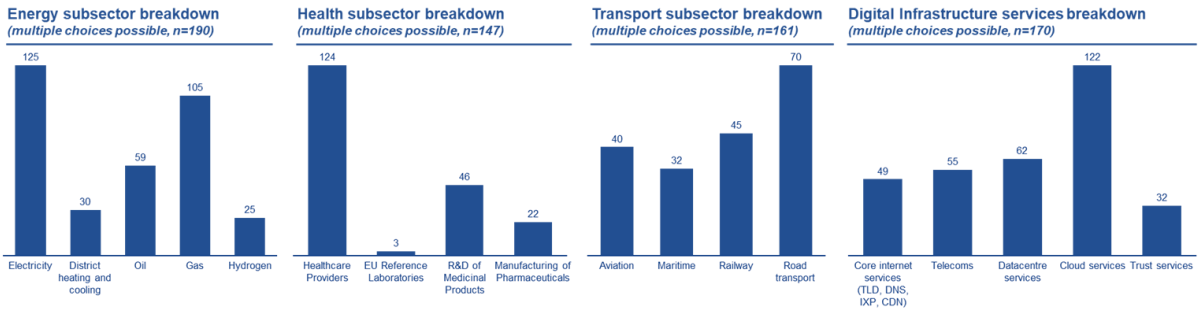


Figure 125 - Subsector composition of the 2025 study sample

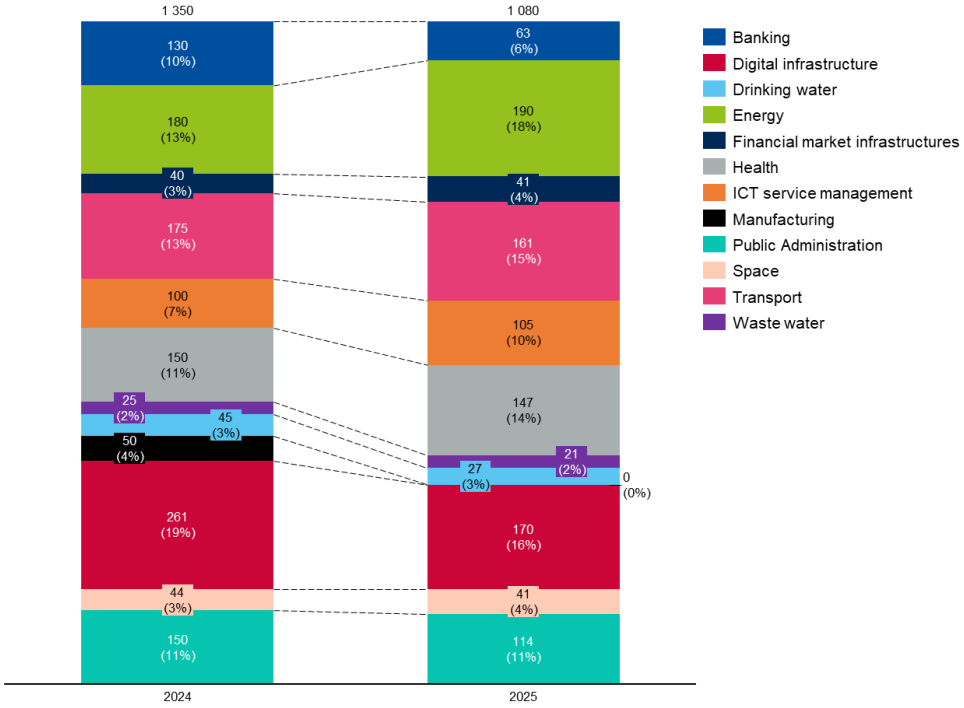


Figure 126 - Sectoral composition of the 2024 vs. 2025 NIS Investment studies

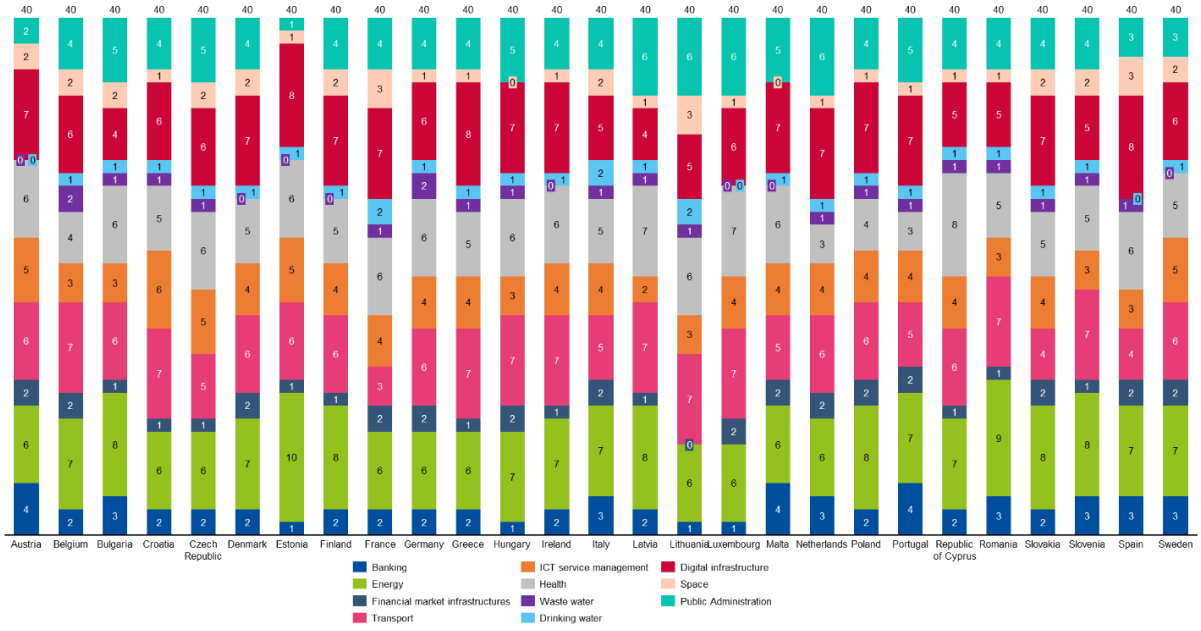


Figure 127 – Sectoral composition of 2025 study sample, per Member State

This year's sample consisted of 83% large enterprises and 17% SME, below you may see a breakdown per sector.

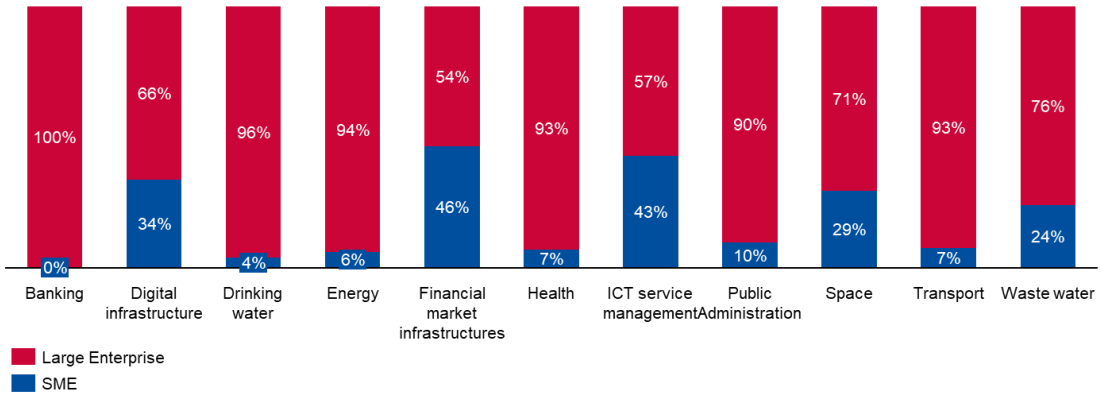


Figure 128 - SME vs. Large enterprises, per sector

Participants are also asked to provide an estimated number for the organisation's revenue and full time employees within the business scope and country they have provided. High level estimates or ballpark figures are accepted.

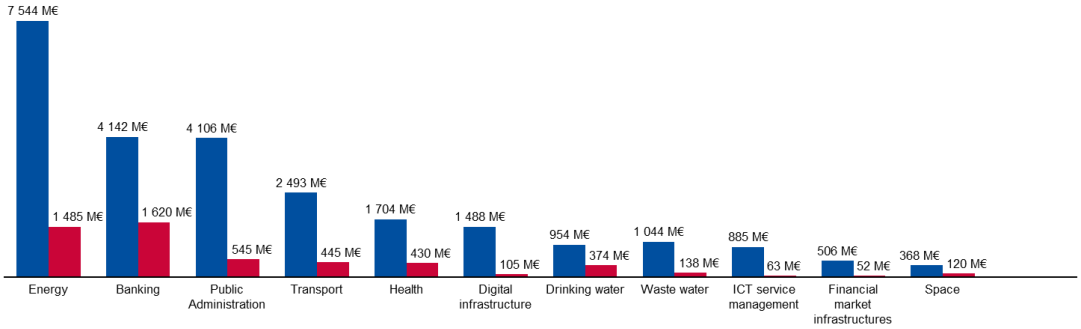


Figure 129 - Revenues per sector

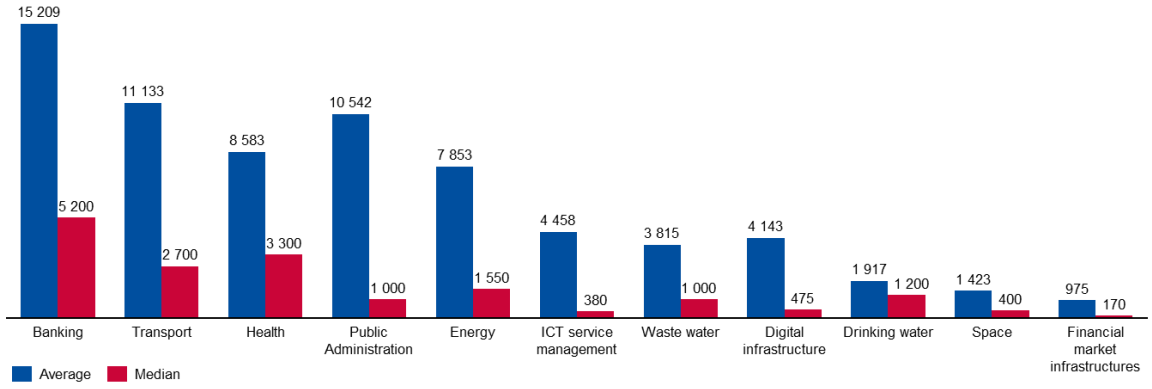


Figure 130 - Employees per sector

SECTION 5

Definitions

5. Definitions

5.1 Median and average definitions

In this study, both **median** and **average** (arithmetic mean) values are presented to provide a more complete picture of the data.

The median represents the middle value in a dataset—half of the entities report higher values and half report lower. It is a robust measure of central tendency, less influenced by extreme values (very large or very small) than the average, and therefore often provides a better sense of what a typical entity reports when data are unevenly distributed. By contrast, the **average is calculated by dividing the sum of all reported values by the number of observations**.

For example, if a few large organisations report exceptionally high cybersecurity investments, the average investment will increase significantly, whereas the median will remain a more representative value. This makes the median especially useful for interpreting data such as cybersecurity budgets or staffing levels, which can vary widely across organisations.

Type	Description	Example	Result
Arithmetic mean	Sum of values of a dataset divided by number of values	(1 + 2 + 2 + 3 + 4 + 7 + 9)/7	4
Median	Middle value separating the greater and lesser halves of a dataset	1, 2, 2, 3, 4, 7, 9	3

When median values for investments or full-time equivalents (FTEs) are reported, it is important to interpret them in context. These are absolute figures and can be influenced by the size of the organisation and the structure of the sector in which it operates; a smaller budget or staffing level does not necessarily indicate lower cybersecurity maturity. Additionally, differences in sample composition and size compared with previous studies may affect the results, meaning that changes over time may reflect variations in the sample rather than actual shifts in investment or capability.

5.2 SME definition

The main factors determining whether an enterprise is an SME are:

- staff headcount.
- either turnover or balance sheet total

Organisation category	Staff headcount	Turnover	Balance sheet total
Medium-sized	< 250	≤ € 50 m	≤ € 43 m
Small	< 50	≤ € 10 m	≤ € 10 m
Micro	< 10	≤ € 2 m	≤ € 2 m

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ABOUT ENISA

The European Union Agency for Cybersecurity, ENISA, is the Union's agency dedicated to achieving a high common level of cybersecurity across Europe. Established in 2004 and strengthened by the EU Cybersecurity Act, the European Union Agency for Cybersecurity contributes to EU cyber policy, enhances the trustworthiness of ICT products, services and processes with cybersecurity certification schemes, cooperates with Member States and EU bodies, and helps Europe prepare for the cyber challenges of tomorrow. Through knowledge sharing, capacity building and awareness raising, the Agency works together with its key stakeholders to strengthen trust in the connected economy, to boost resilience of the Union's infrastructure, and, ultimately, to keep Europe's society and citizens digitally secure. More information about ENISA and its work can be found here: www.enisa.europa.eu.

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