
Canam Research
2019 SCADA &
ICS Security
Survey Trend Report

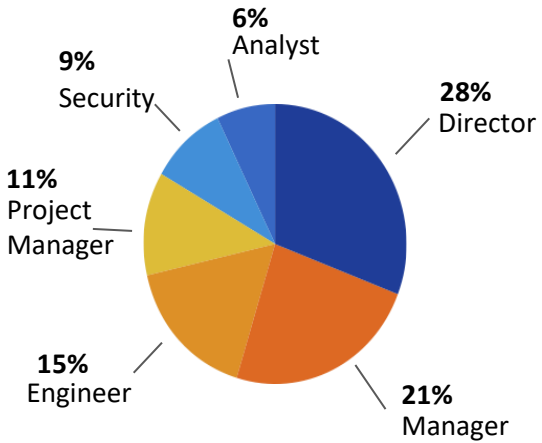
Executive Summary

- Canam Research partnered with Fortinet to conduct The 2019 SCADA & ICS Security Survey
- To date, over 60 IT & Security professionals have participated

Research focused on the:

- State of SCADA/ICS security in the Manufacturing sector
- Satisfaction with SCADA/ICS security
- Tools being used to protect SCADA/ICS systems
- Greatest areas of concern within SCADA/ICS security

Respondents titles include:



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Key Observations

Minimal Satisfaction with SCADA/ICS Security – Less than **15%** of respondents reported they are highly satisfied with their SCADA/ICS security implementation.

47.62% of respondents are not sure if they have audited their SCADA/ICS connections and networks and 12.70% indicated they have never done an audit. **Less than 10%** of respondents do monthly or real-time audits.

Over 70% of respondents have hardened their SCADA/ICS network by removing and disabling unnecessary services and eliminating proprietary protocols. Nearly 50% have conducted training for employees on security.

Over 60% of respondents indicated some lack of confidence in their ability to detect and respond to a SCADA/ICS security event.

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How satisfied are you with your SCADA/ICS security implementation?

62% of respondents are moderately **unsatisfied** with their SCADA/ICS security implementation.

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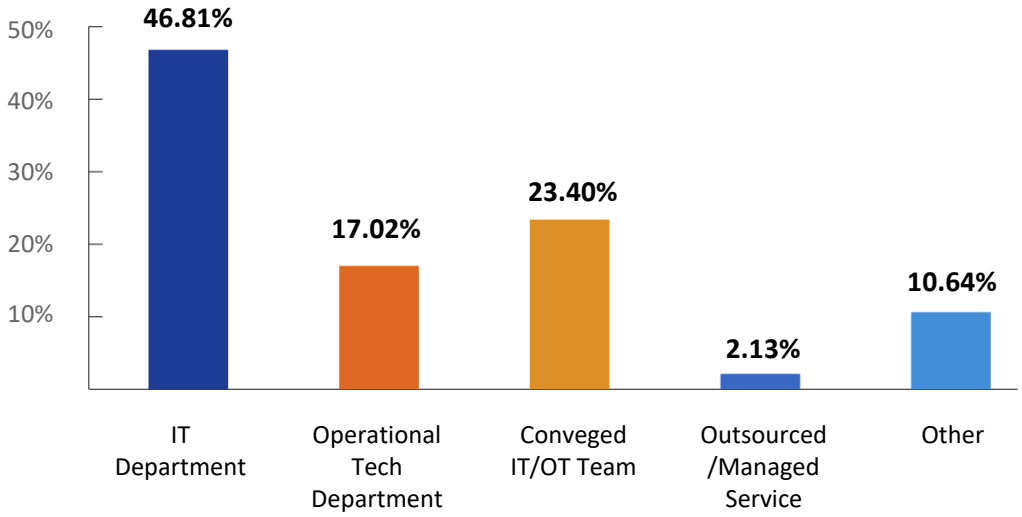
Who has primary responsibility for SCADA/ICS security?

The **IT Department** by far is still responsible for SCADA/ICS security though we're seeing growth in the responsibility from a converged IT/OT Team.



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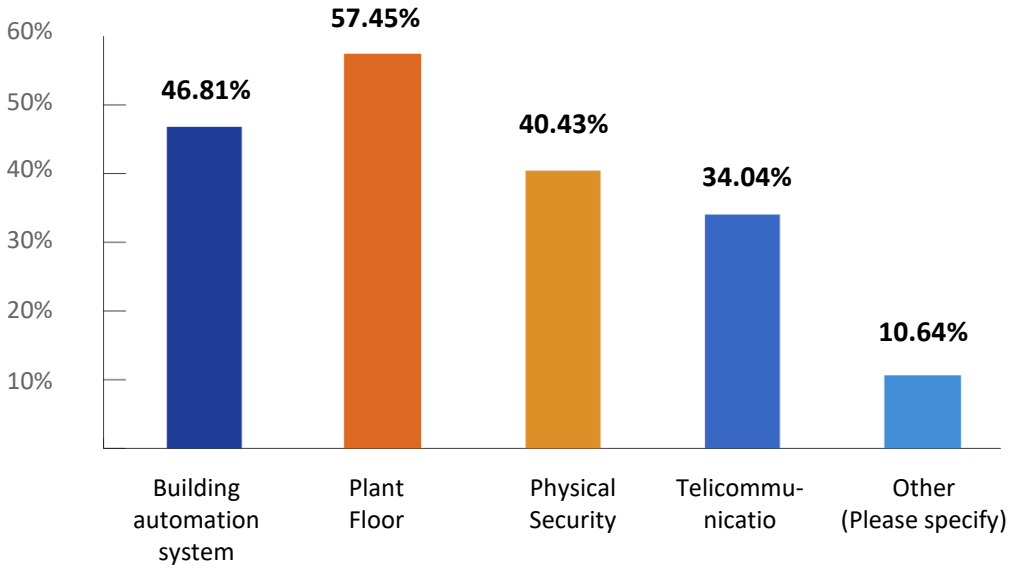
Which of the following are considered OT systems?



Organizations have a mixed approach as to what systems are considered to be part of the OT environment.

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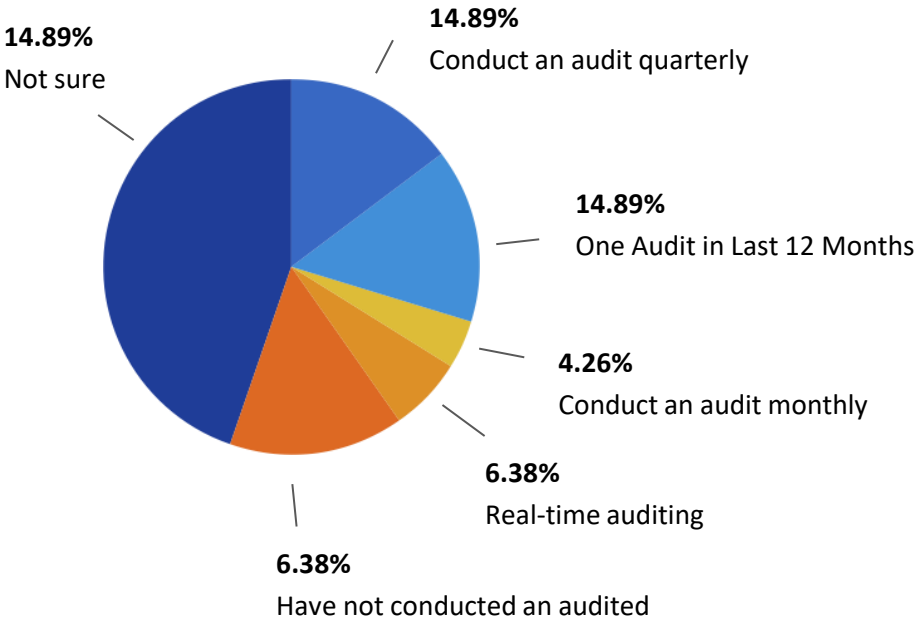
How often do you audit your SCADA/ICS connections and networks?



Nearly **HALF** of respondents are unsure of how often their organization conducts an audit of the SCADA/ICS connections and networks.

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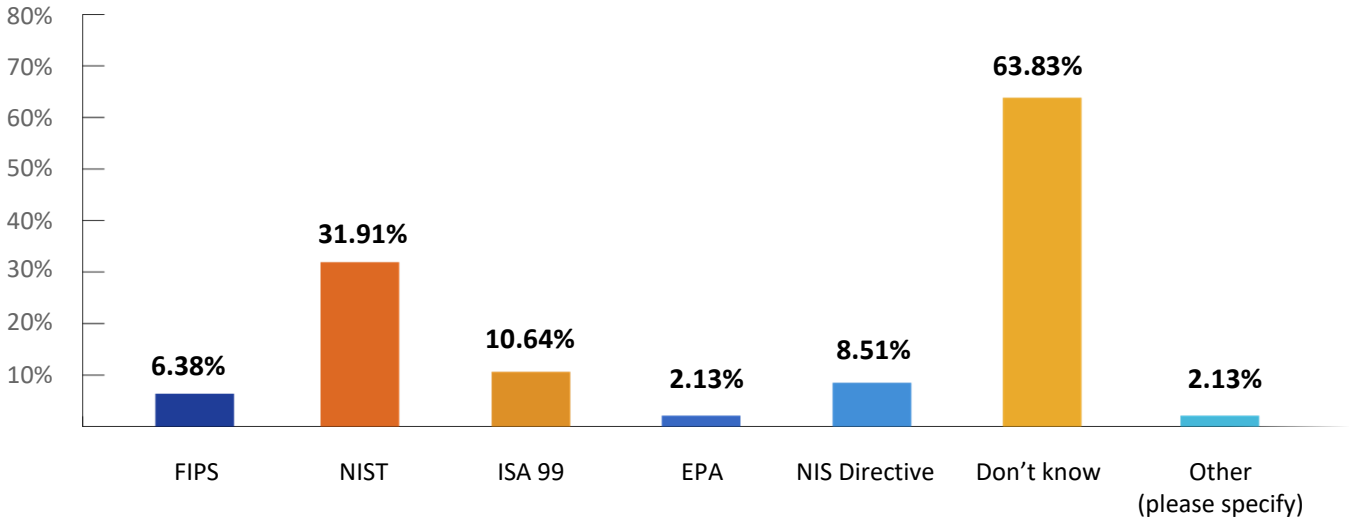
What standards do you audit to?



NIST is the most popular standard referenced by respondents, but the majority DON’T KNOW what standards (if any) their organization is using.

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What are some of the steps you have taken to secure your SCADA/ICS Network? (In order of priority)

1. **Hardened Network by removing and disabling unnecessary services**
2. Training and education of employees on security
3. **Implemented Encryption SSH / TLS**
4. Physical audit of SCADA & ICS devices
5. **Implemented 3rd party security products**
6. Eliminated proprietary protocols from the network
7. **Established a SCADA/ICS security team**
8. Outsourced to 3rd party security consultants and vendors

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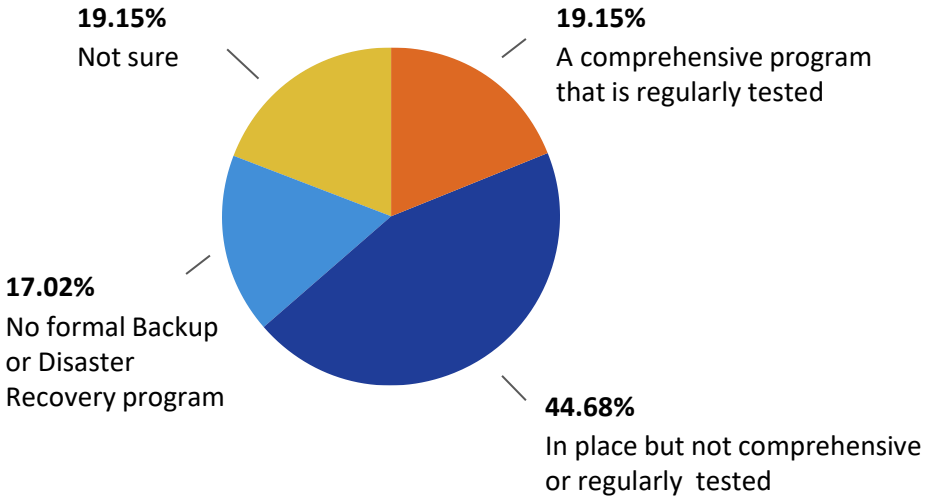
Which best describes your SCADA/ICS backup and disaster recovery?



64% of respondents have a backup program in place, though not comprehensive or regularly tested.

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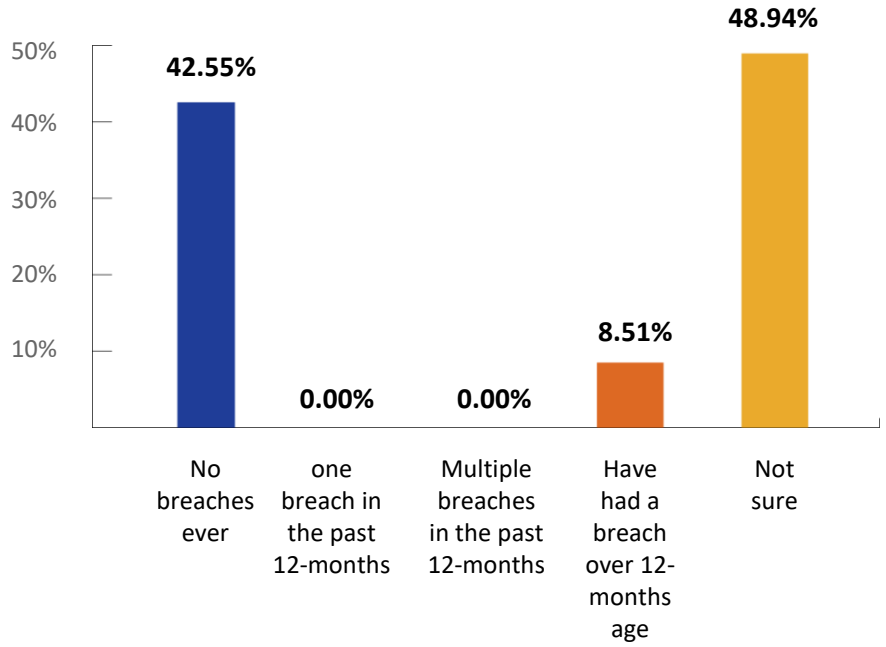
Have you experienced a SCADA/ICS breach?

Half of Survey respondents don't **even** know if they've experienced a breach!



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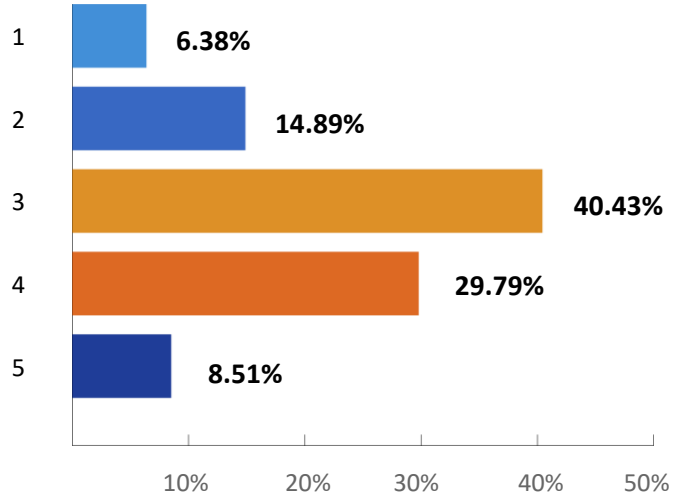
On a scale of 1 to 5 rate your ability to detect and respond to a SCADA/ICS security event? (1 being not very capable and 5 being very capable)

Less than **40%** of respondents feel that they're "very capable" of detecting and responding to a security event.



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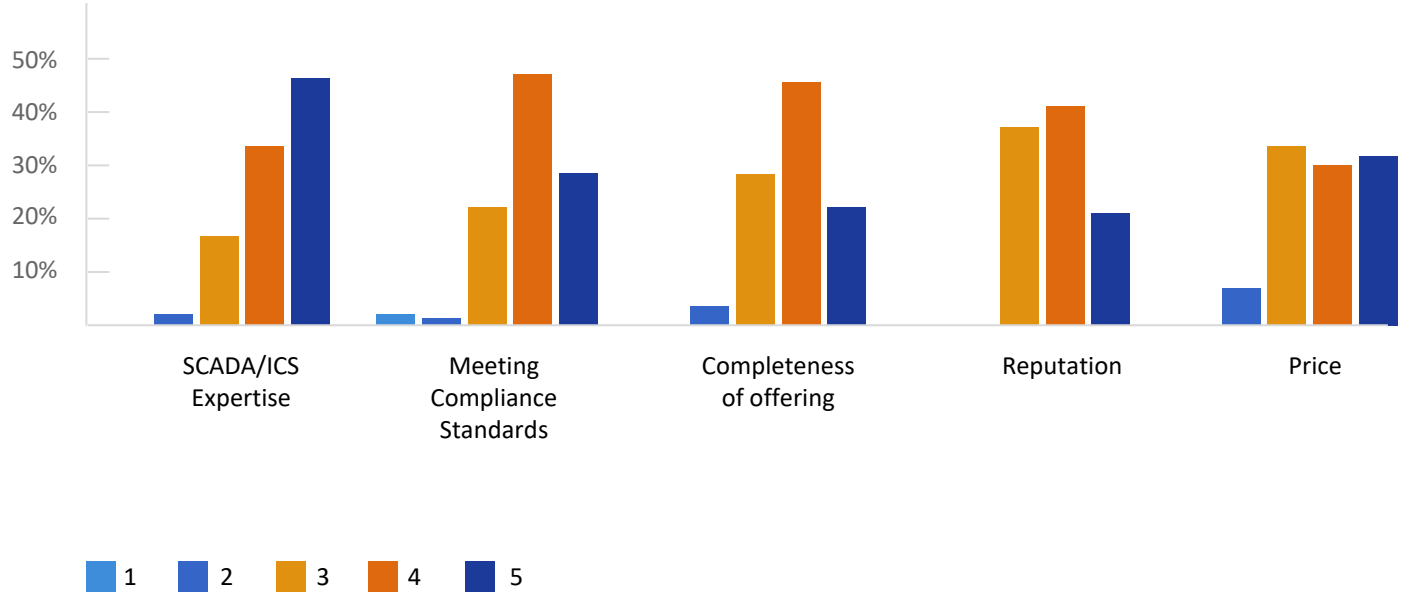
Rate the following in importance for selecting SCADA/ICS security vendors. (Rate 1 - 5 with 1 being not important and 5 being very important)



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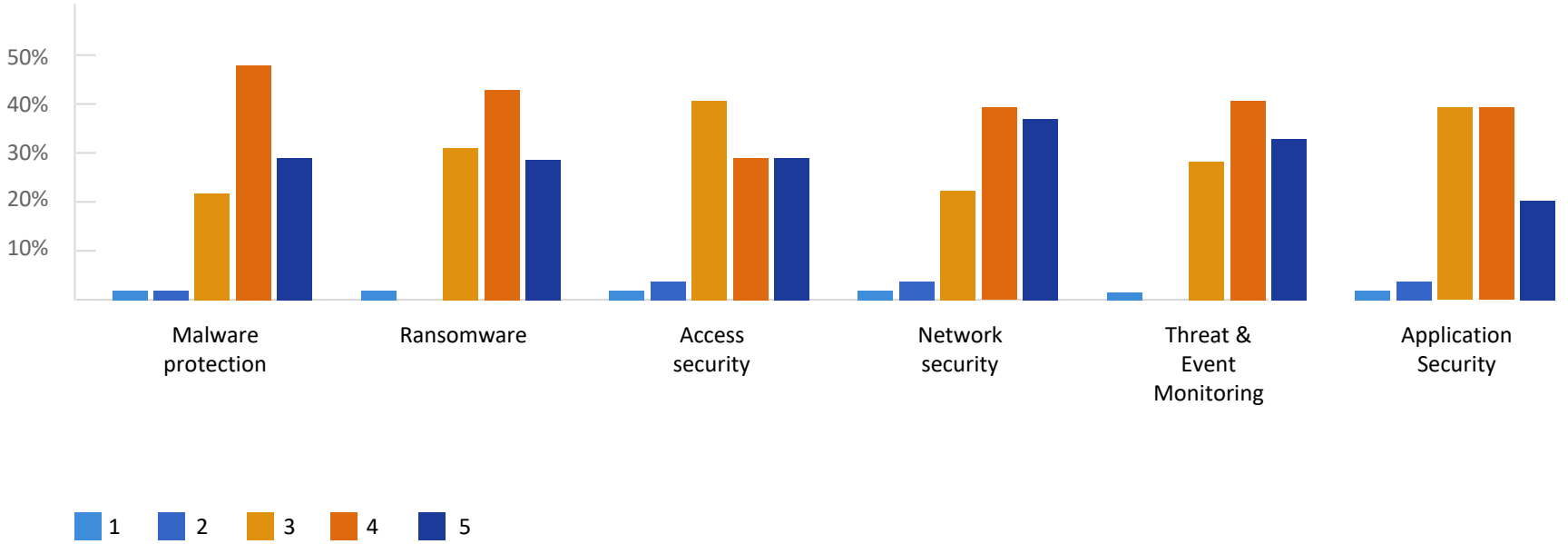
Rate your level of concern with the following security issues
(Rate 1 - 5 with 1 being not concerned and 5 being very concerned)



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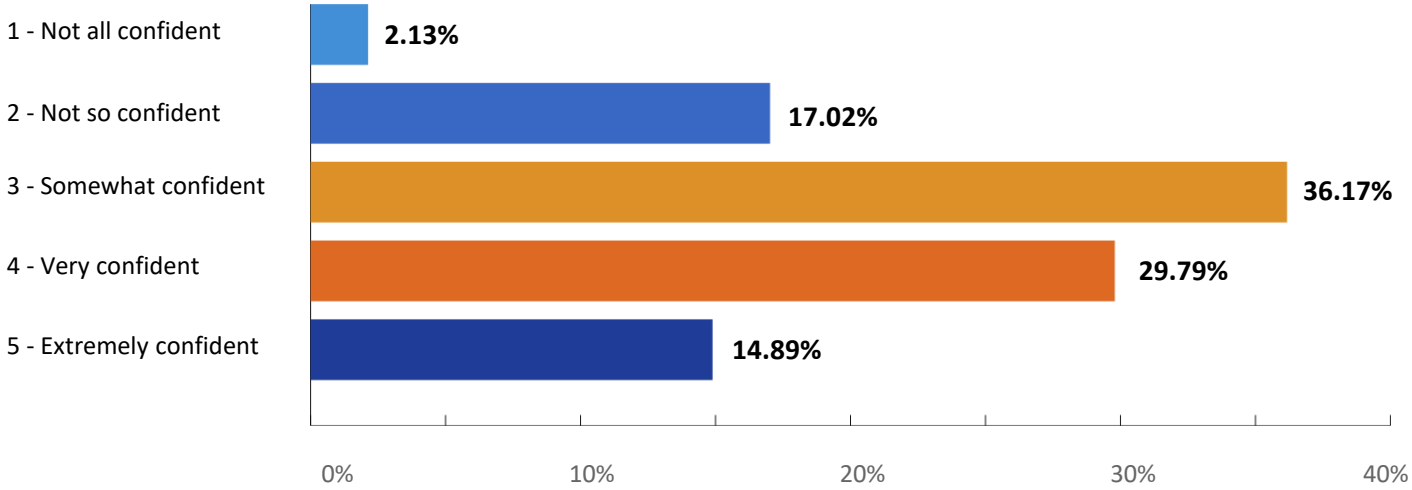
Rate how confident you are that you have the right people or can hire enough of the right people to address your SCADA/ICS security requirements. (Rate 1 - 5 with 1 being not confident at all and 5 being very confident.)



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Fortinet delivers top-rated industrial control systems and critical infrastructure security. The technology delivers highly reliable small form-factor devices that integrate industry-specific security intelligence with networking for remote access without opening the control box.

Thank you!

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