



Continental Commercial Vehicle Days

Study “Cybersecurity in Road Transport”

Dr. Mathias Dehm | September 8, 2020

Commercial vehicles are connected through a broad-based network.



Commercial vehicles are connected through a broad-based network.

More connectivity, more vulnerability.



More vulnerability, more protection?



Methodological profile of the study

Qualitative expert interviews and an industry panel

Participants

Those responsible for cybersecurity in the commercial vehicle industry (associations, suppliers, transport companies, fleet companies, authorities)

Format

- › 45-minute talks based on guidelines
- › Industry panel with 40 participants from transport & trucking companies and logistics providers

Content of the study

Key questions on digitalization, the importance of cybersecurity, threats, measures, structures, sources of information and the need for improvement

Cybersecurity

Vehicles, but also the vehicle environment and organizational structures

Survey timeframe

Dec. 2019 – February 2020

infas

Fleet

TOLL



A man with a short beard and a black t-shirt is driving a car on a multi-lane highway. He is looking forward, and his hands are on the steering wheel. The car's interior is visible, including the dashboard with a digital display showing a map and a tablet mounted on the center console displaying a music player interface. Outside the car, a silver sedan is driving in the adjacent lane, and a body of water is visible in the background under a clear blue sky.

The industry feels secure
in terms of cybersecurity
and only makes modest
investments as a result.

A man with a short beard and a black t-shirt is driving a truck on a multi-lane highway. The view is from the driver's perspective. The dashboard features a digital display showing a map and a red warning sign that reads "You have been HACKED!". The text "The industry feels secure in terms of cybersecurity and only makes modest investments as a result." is overlaid in orange on the upper right. Another text overlay, "This policy entails risks.", is in white on a yellow banner across the middle. The background shows a clear blue sky and distant hills.

The industry feels secure in terms of cybersecurity and only makes modest investments as a result.

This policy entails risks.



**We've paid enough
attention to this topic.**



We feel secure!



**Defensive measures have
been taken.**



**No larger
investments planned.***

Source: Commercial Vehicles Study 2020 with a focus on cybersecurity.
Based on: companies with commercial vehicles at the company site (n=33), *resp. transport, logistics or forwarding companies (n=40)

The cybersecurity gap is widening.

Big differences between large and small companies

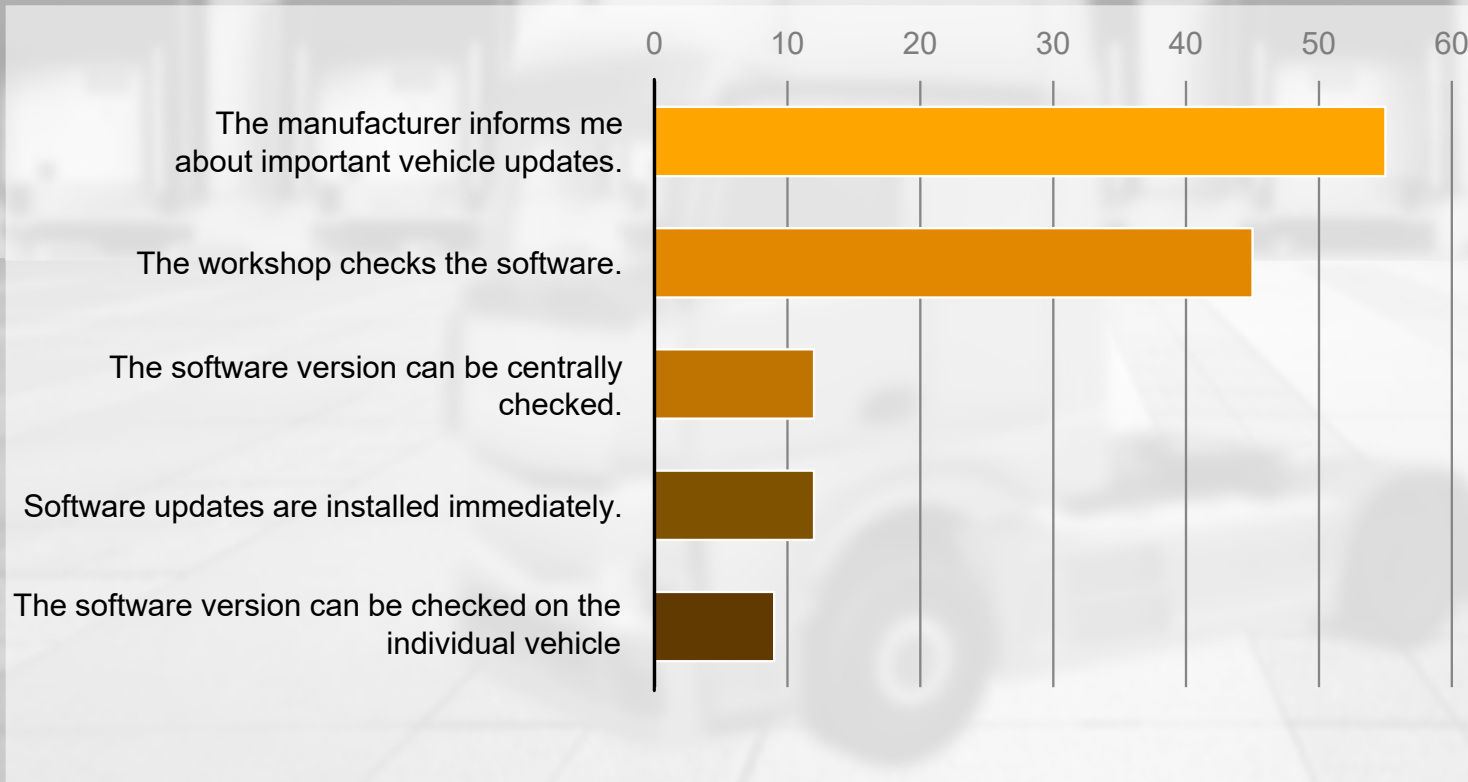


Cybersecurity is not a “band-aid”. It needs to be properly anchored throughout the company.



Software version on the vehicles

Frequent trust in manufacturers and workshops



Question: Do you know for sure which software version is being used on your company vehicles – and whether or not this software is affected by known security loopholes? Please indicate which of the following statements applies to you.

› Based on: companies with commercial vehicles at the company site (n=33), multiple answers possible



With an increase in connectivity and automation, cybersecurity is essential to enable a safe journey.

Cybersecurity is an important part of the transport industry. It will continue to grow in importance!

- › Cybersecurity protects the benefits of digitalization.
That's why it is especially relevant for the commercial vehicle industry.
- › Cybersecurity should take the big picture into account – covering fleet operators, vehicle manufacturers and component suppliers.
- › More companies will be willing to invest, but only when the true value of cybersecurity becomes clearer or relevant regulations come into force.
- › The UN ECE WP.29 regulation is an important step towards greater vehicle security. Cybersecurity will become increasingly important as the level of connectivity grows.

