Wavestone Cyber Benchmark

2026 Edition

What is the market maturity?

June 2026

WAVESTONE

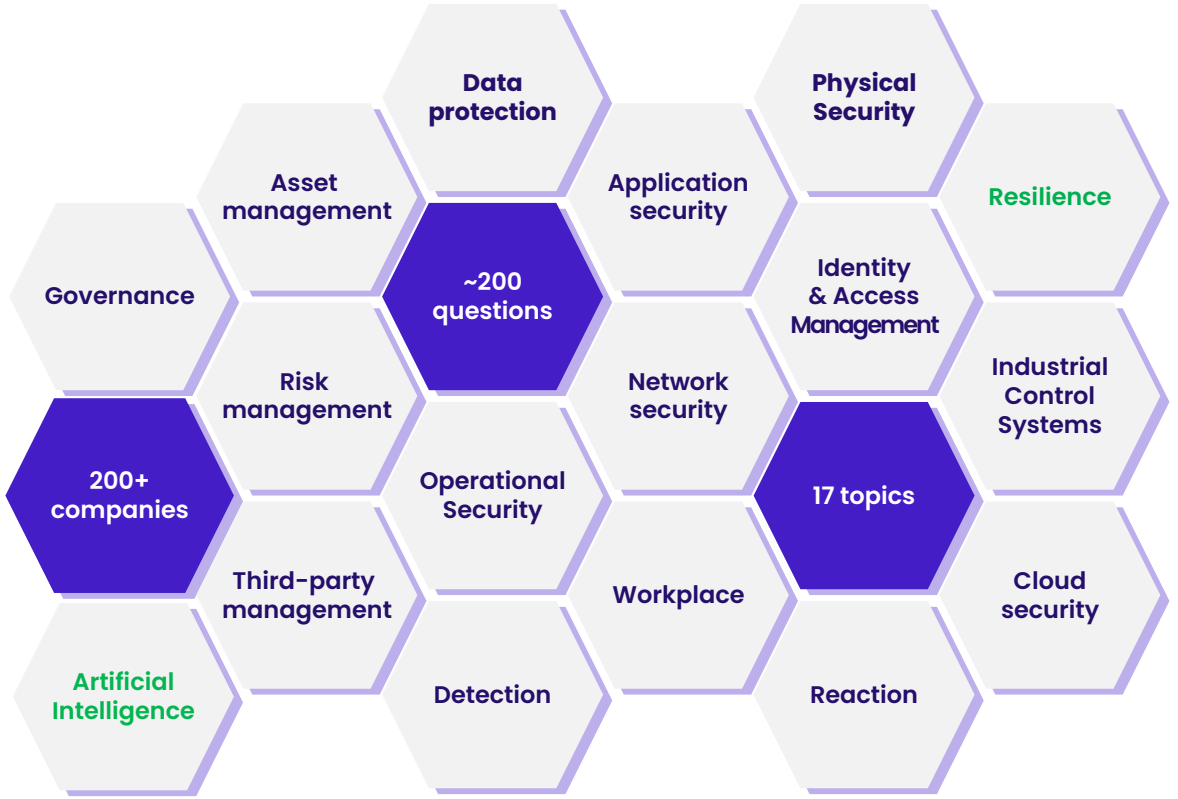
Wavestone Cyber Benchmark: an in-depth analysis of the level of cybersecurity maturity

Based on NIST Cybersecurity framework, ISO 27001/2 and NIS 2, the **W-CyberBenchmark***, our **360° assessment approach, goes further** and provides:

A comprehensive approach with an **organizational** and a **technology** maturity **assessment** including a **pioneer level** that capture innovation

An assessment built for **multi-entity complexity**, now expanded to include **AI security**

200+ Wavestone customers including **100+ companies** with a turnover above 1 billion and presenting more than 7 millions employees



*from data extracted on the 1st of April

Large Organizations Cyber Maturity Keep Accelerating

Large organizations*

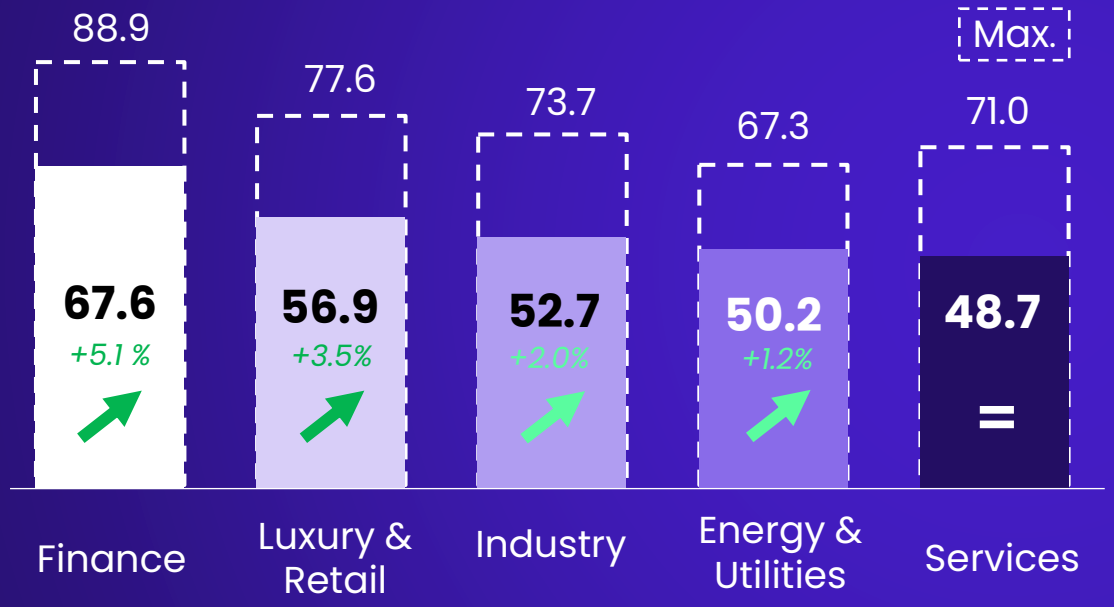
55.3

/100

Large organizations showed a sustained rise in cyber maturity, and growth is now speeding up **(+1.3 pts vs. 2025)**

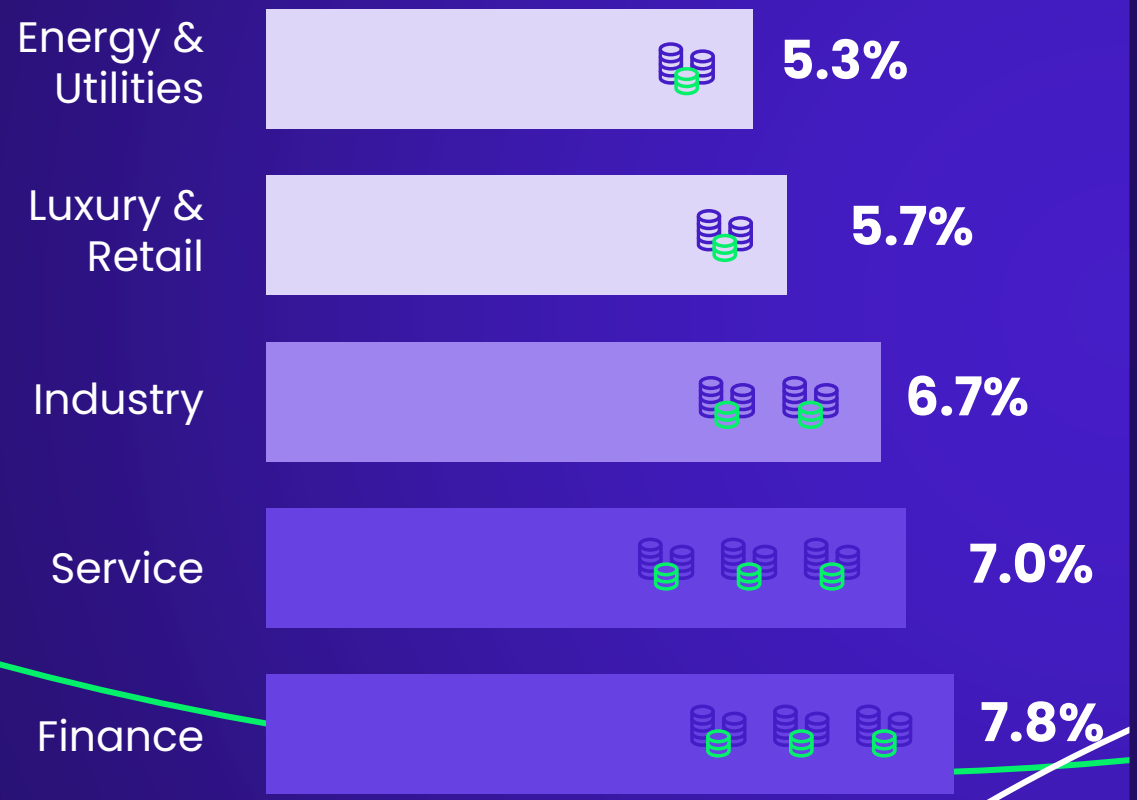
*Companies with a turnover over $1B (100+ org.)

Financial sector is **well ahead** in overall maturity



Regulations have a **major impact** on maturity

Cybersecurity spending remains mostly stable in large organizations*



Average IT budget percentage dedicated to cybersecurity*

6.7%

2025: 6.4%

Range

First quartile	Last quartile
3.1%	8.0%

**Taking into account that budget percentages can vary a lot depending on previous investments and current build VS run balance*

**Companies with a turnover over $1B (100+ org.)*

Despite the lack of resources, cyber teams are still growing...

Average FTE dedicated to cybersecurity per employee in large organizations

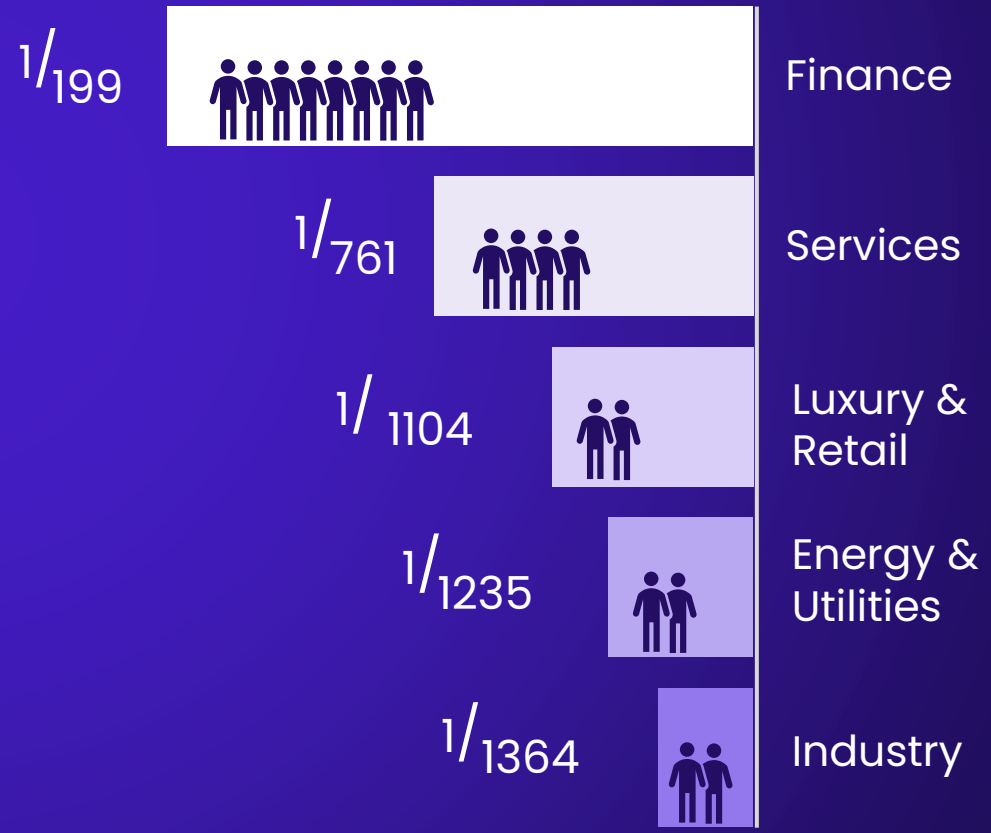
1/979

2025: 1/1016

Range

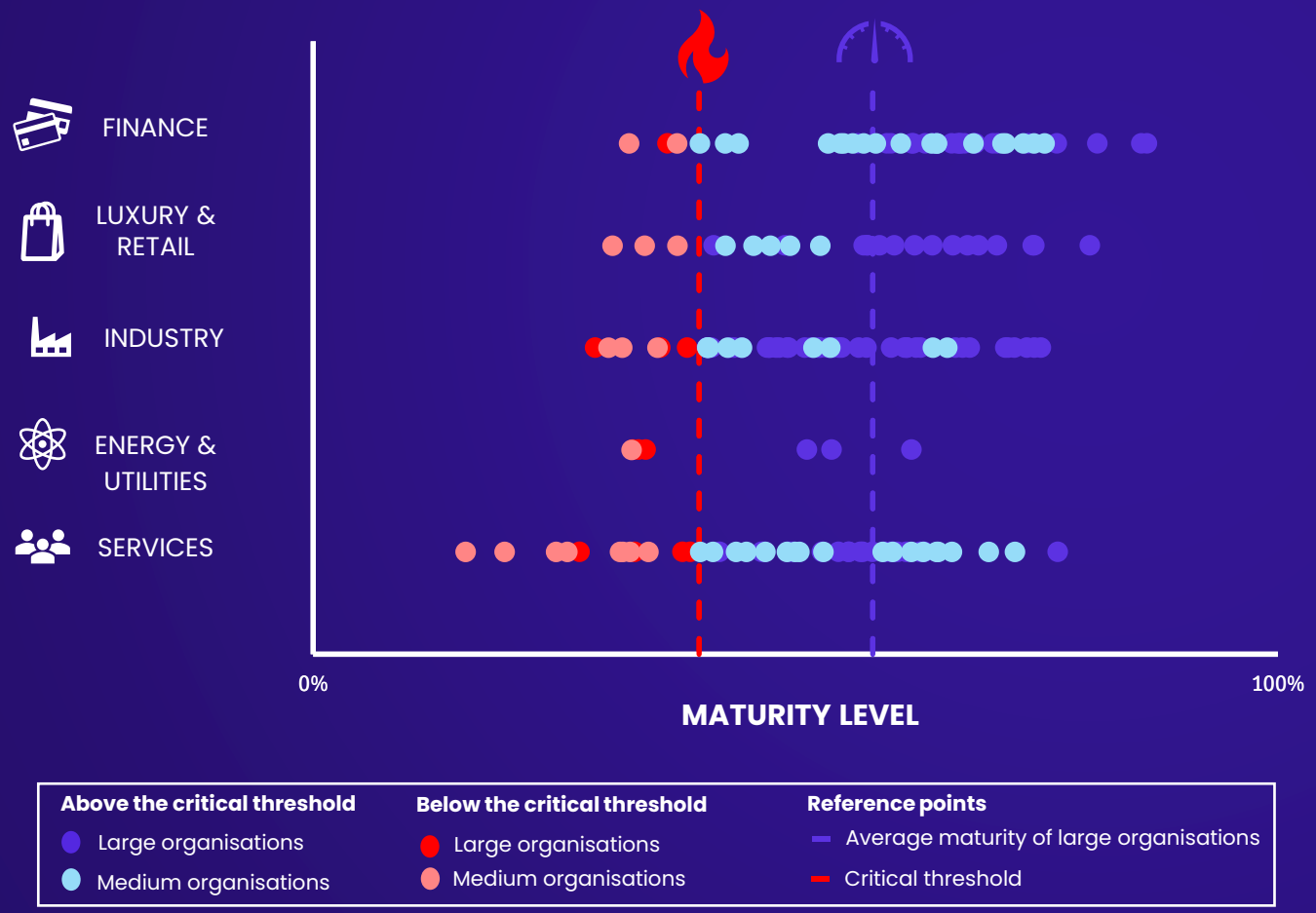
Best in class (top 10)	Last quartile
1/83	**1/1188**

... but disparities between sectors remain strong



How does the market stand against the latest cyberattacks?

Based on the latest **cyberattacks managed by CERT-Wavestone**, we have selected 29 anti-ransomware measures and assessed our customers' maturity on (attack entry point protection, crisis management, backups, red button…)



58% (+2%)

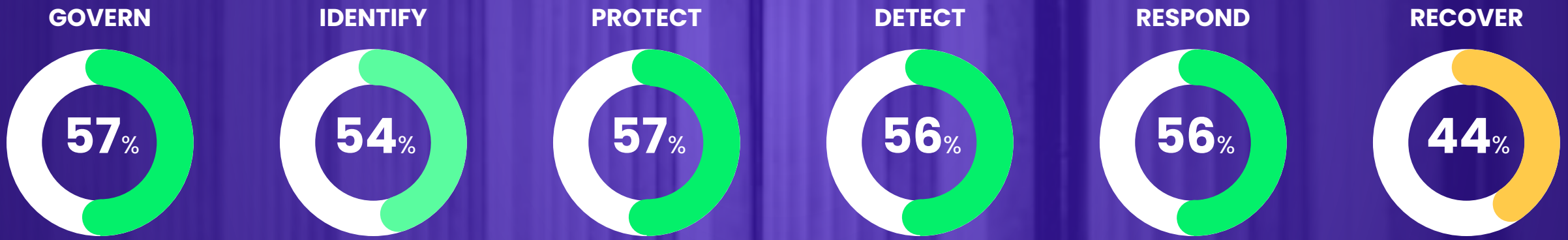
ANTI-RANSOMWARE MATURITY OF **LARGE ORGANIZATIONS*** AND ONLY A FEW IN CRITICAL SITUATION

25% (-11%)

OF **MEDIUM ORGANIZATIONS** CONSIDERED TO BE IN A **CRITICAL SITUATION**

Companies with a turnover over $1B (100+ org.)

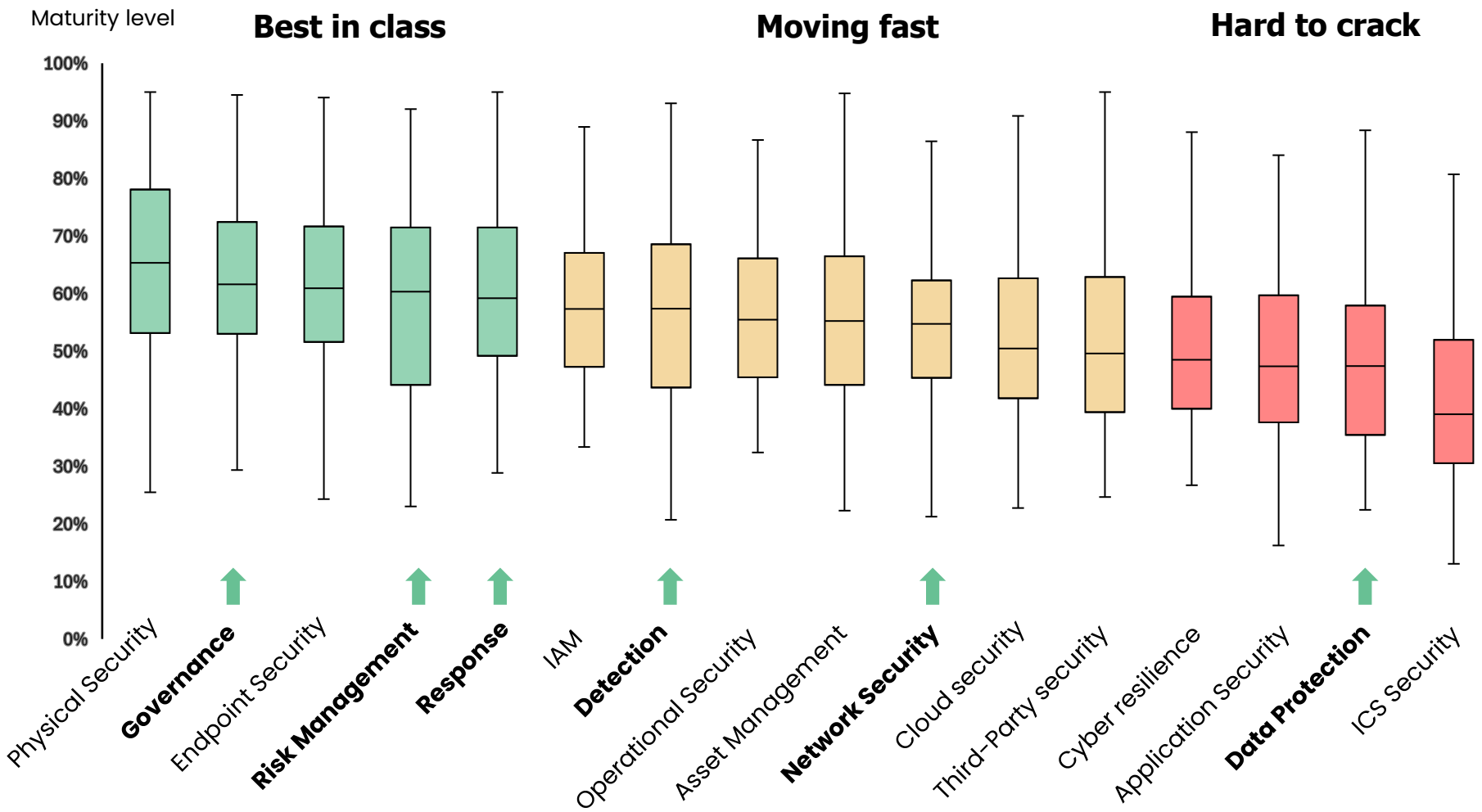
What is the market **MATURITY** in adopting the new **NIST Cybersecurity** Framework?



The **high consistency** across the **NIST CSF 2.0 pillars** highlights the **significant cybersecurity investments** made in recent years. The only exception is the "**Recover**" pillar, which lags behind in **crisis management** and **resilience capabilities** though the **financial sector stands out** with a higher maturity level (58%)

High-level snapshot of cybersecurity performance

Large enterprises' cyber maturity overview



Legend

↑ Topics that have gained maturity since 2024

Box plot view of maturity score for every topic: Minimum / 1st quartile / Median / 3rd quartile / Maximum

Governance
Governance has improved (+2%), driven by regulatory pressure and stronger executive involvement, with clearer roles and better integration of cybersecurity into business strategy.

Risk management
Risk management is progressing (+2%) with more structured approaches, improved risk prioritization, stronger treatment plans, and increasing use of proactive measures like bug bounty and agile integration.

Detection
Detection capabilities are advancing significantly (+5%) thanks to SOC maturity and the adoption of SIEM, EDR/XDR, and AI, improving visibility despite ongoing operational challenges.

Incident response
Incident response has improved (+2%), supported by better team availability, external support, and more structured documentation, enabling faster and more coordinated reactions.

Resilience
Cyber resilience has improved (+3%), with organizations strengthening their preparedness through expanded cyber insurance coverage, more frequent crisis exercises, and increased testing of backup restoration, helping ensure better continuity in the face of major incidents.

What **TO EXPECT** in the years to come?

Current maturity:

5 key topics from 2026

*With a specific sample of +20 organizations

Governance & Risk Management: Strongly Established, Constantly Advancing

62% **58%**

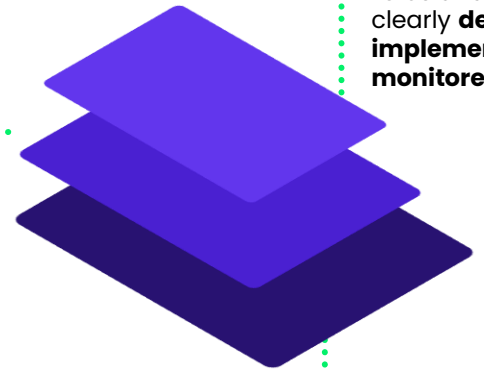
These figures highlight the **continued strengthening** of **governance** and **risk management**, with maturity levels reaching 62% for governance (**+2%** since **2024**)* and 62% for risk management (**+2%**)* reflecting **sustained investment** and **steady progress** despite their high level of maturity.

92%

Have their Cybersecurity **roles** and **responsibilities** clearly **defined**, and their **implementation** regularly **monitored**

74%

Have their security **roadmap complete**, **documented**, and **regularly updated** to take into account the **progress** of projects



50%

Have their Cybersecurity **supervised** at an **ExCom** level

Have a **Bug Bounty program** set up to increase vulnerability detection capabilities

55%

42%

Have a risk management process **adapted** to suit **agile projects** (Evil User Stories, ...)

67%

Manage risks through a **Risk Treatment Plan** and **prioritize them** according to the **classification**

New activities to be integrated regarding to AI

**Companies with a turnover over $1B (100+ org.)*

AI Risk Management

Design and maintain the AI risk management framework, lead and coordinate AI risk assessments

AI Compliance Office

Lead AI compliance (AI Act, NIST AIRMF) and define the AI system classification (high risk, etc.)

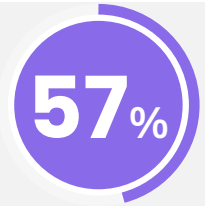
AI Governance

Define and maintain AI policies, standards, controls, and facilitate AI decision-making processes

AI Third-Party Risk Manager

Evaluate AI suppliers and manage SAAS/API risks (LLM, etc.)

Detection: stronger controls, faster response

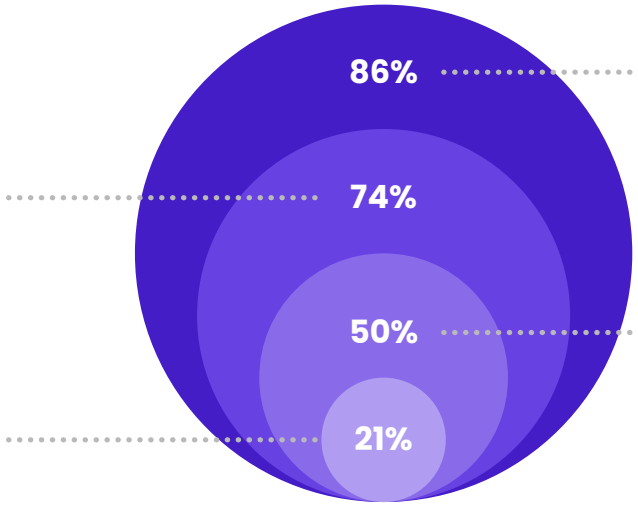


Detection continues to make progress in **2026**, reaching a maturity of **57%** among large organizations (**+5%** compared to **2024**)*

Percentage of large organizations that have implemented each specific practice:

A **defined process** to create **use cases** based on the main risks identified for the company

Shared IOCs with third parties **whenever** the opportunity arises

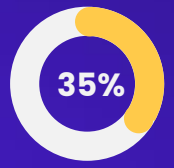


Enrichment of detection scenarios **with logs** from **internal services** (e.g. CMDB) and **external sources** (cyber threat intelligence) to contextualize alerts

Analysis of **business applications logs** related to security events

Main challenges to be overcome with the arrivals of AI solutions?

Creation of **custom detection** scenarios for **advanced threats** (e.g. rogue administrators, lack of client segregation)



Integration of **behavioral analysis** capabilities into **detection probes**

Companies with a turnover over $1B (100+ org.)

Response: An Ever-Evolving Incident Challenge

Maturity of **response** capabilities by **large organizations** rose significantly (**+2%** compared to **2024**)*

Percentage of large organizations that have implemented each specific practice:

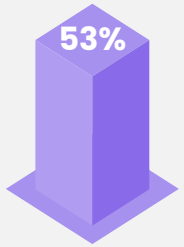
A Solid Foundation

Definition, **communication**, and **enforcement** of a security **incident management process**

Establishment **of clear 24/7 emergency SLAs** and **confidentiality requirements** with cyber response contractors

A 24/7 assistance team can be mobilized with **limited means** (expertise, size…)

Ongoing Challenges



Documentation **of distinct cyber response plans** tailored to **different incident** and **attack** types

Deployment of a **SOAR** solution to **automatically isolate resources upon** alert detection

Main challenges to be overcome

**Companies with a turnover over $1B (100+ org.)*

AI-enabled threats

Increased and more **sophisticated phishing** and **deepfakes**, as well as the first **malware leveraging AI** in its deployment, are emerging

AI transformation

First successful deployments have **automated the response on spam and phishing**, improving alert qualification,

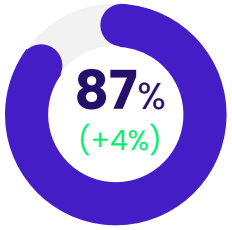
AI response team

Dedicated **AI-focused response teams remain limited**

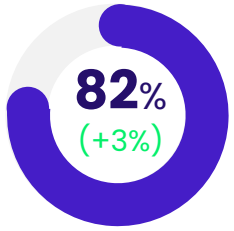
Cyber Resilience: a strategic ambition still hard to achieve

Cyber resilience remains a **complex topic** (**+3%** compared to 2024, notably in **Finance +5%**)*, as **few organizations** are truly prepared to maintain their business in the event of a **major attack**

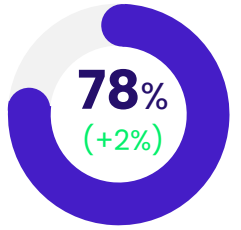
Percentage of large organizations that have implemented each specific practice:



are covered by a **cyber insurance policy**

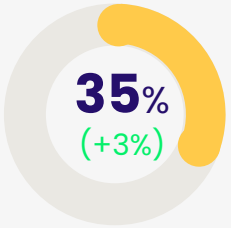


conduct crisis management exercises at least every two years

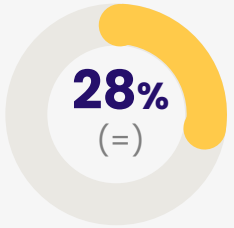


regularly conduct **restoration tests** in accordance with their backup policy

Despite the progress, certain areas still need strengthening



deploy **degraded mode processes** tailored to users and critical functions



assess **dependencies across each business chain** at a global level

In 2026, resilience teams are currently **reviewing** their **risk evaluation** and **response** due **to political evolutions** (technology bans, data flow limitation, local regulations, …)

**Companies with a turnover over $1B (100+ org.)*

Securing a critical asset: artificial intelligence

38% We are reaching a first level of maturity in AI security, based on insights from +20 large organizations

AI governance and risk identification is already a thing …

76%

Have an **AI security policy**

62%

Give clear **go/no go decision at AI project risk** review

57%

Identified a team to assess **AI projects compliance**

48%

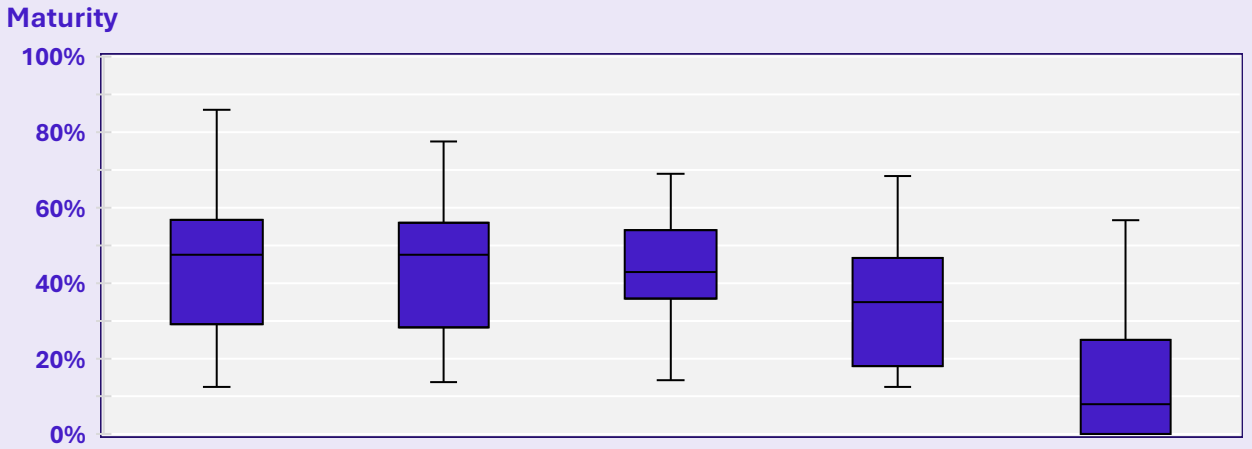
40% of clients **adapted their Third-Party assessment** methodology for AI vendors

10%

Established measures to defend **against malicious prompts** and other threats

…but the journey has just started for complete maturity

GOVERN	*IDENTIFY*	*PROTECT*	*DETECT*	*RESPOND*
48%	*48%*	*43%*	*35%*	*8%*



There is no '**Recover**' pillar, as there is no **dedicated recovery specialization for AI.**

NIS 2: How compliant is the market with French security requirements (ReCyF)?

Large organizations*

60

/100

Organizations **not** currently **subject to cybersecurity regulations** achieve only **60%*** NIS2 maturity **highlighting** the **substantial efforts** still required to **reach full alignment**

First Observation

NIS2 compliance remains **heterogeneous**, with **French** pure players and **international actors progressing** at **different paces due to the uneven transposition of the directive across European jurisdictions**

Second Observation

The level of NIS2 requirements remains **uneven** across countries, from **highly stringent** to **more flexible approaches**, forcing large organizations to **align** at the **closest level** across **all subsidiaries**

Wavestone's added value

An AI-based tool comparing NIS2 regulations across countries, bringing clarity to a fragmented landscape

Hard-to-crack topics

- Enhance Third Party Risk Management
- Ensure Resilience
- Strengthen Asset management
- Meet Administration requirements

Cross-country difficulties

Regulatory difficulties

Uneven regulatory involvement across countries creates inconsistencies in **oversight** and **expectations**

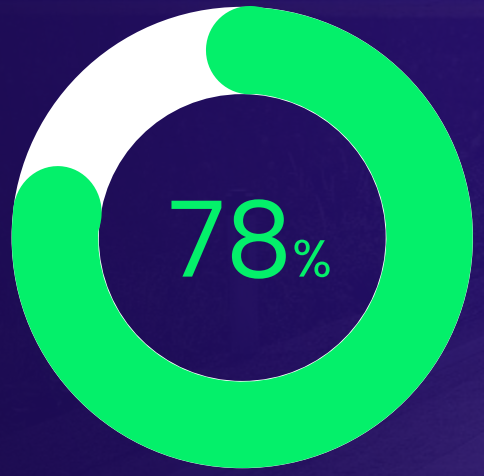
Scoping difficulties

Diverging audit scoping approaches (local vs global systems) across countries lead to **unclear** regulatory **submissions**

** Based on a sample of 15 large organizations across various sectors, assessed against local NIS 2 frameworks; evaluations covered either the full organization or specific scopes*

The need to address **Emerging** and ***innovative*** *topics*

Many companies are **starting to reach a high level** of maturity against the international standards



Average maturity score of TOP 10 companies in our cyber benchmark

A need to cover the new and innovative topics

Quantum Cryptographic

AI security

Just-in-time / Just enough

API based

Quantification

Security Data Hub

Culture change

Digital twin

AI for cyber

Plateformization

Introduction of a new maturity level for pioneers

Levels 1 to 4
(NIST based)

Level 5
Pioneer level

45%

***Culture Change Score**: based on organizational questions*

53%

***Innovation Score** : based on technical questions*

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