

Cyberzaintza

**Development of a leading industrial
cybersecurity ecosystem in Southern
Europe**

ECCO – June 24th, 2024

How did everything start?

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A business fabric born in the 90s

- The very first companies created in our region, Panda in Bilbao and S21sec in San Sebastian, where also pioneers in Spain.
- Our entrepreneurial and innovative culture caused many others to be created from them.
- The startups ecosystem is vibrant and dynamic, every 3-4 months a new company comes from other regions or countries.
- The proportion of cyber technology startups (vendors > 80%) is very significant compared to those born to offer services (providers).



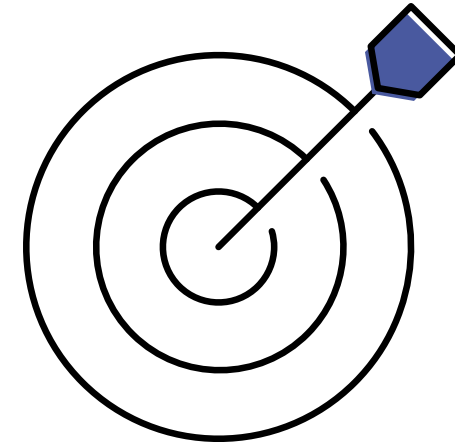
THALES



How did everything start?

2017 - Many players but not an ecosystem

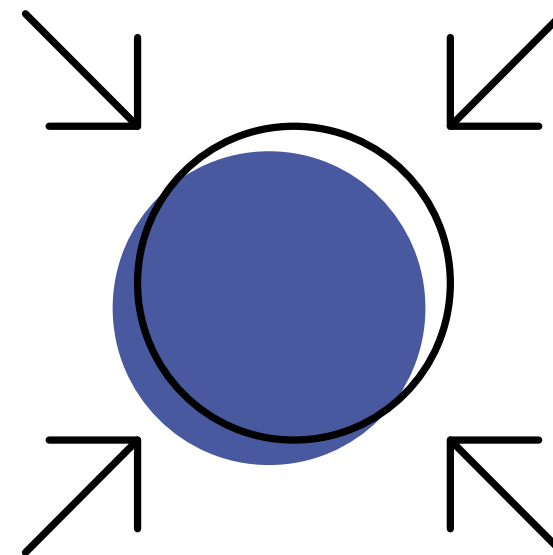
- Many companies but lack of understanding what all they were about.
- Absence of a common strategy.
- Inexistent dialogue between users and cyber companies.
- International promotion was “everyone for themselves”.



How did everything start?

The BCSC as an accelerator

- Grants programme.
- Capacity map.
- Awareness sessions.
- Telephone helpline for companies (24x7).



Creating the future for the sector

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Strategic Plan for the cyber sector 2020-2024

- Aspirational statement.
- Self discovery.
- Benchmarking.
- Specialization.



Creating the future for the sector

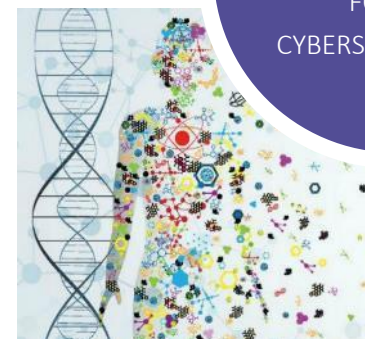
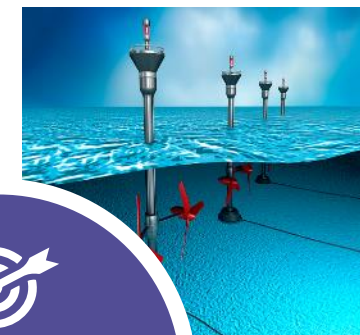
Specialization

- Low maturity of competitors.
- Market growth expectations.
- Local users willing to adopt new solutions.
- Institutional commitment.

Advanced manufacturing



Energy



Bio Sciences

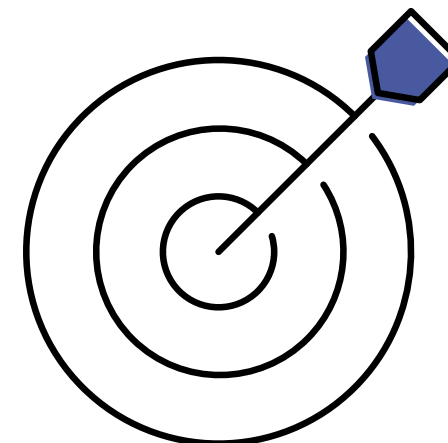


Foodtech

Creating the future for the sector

Key initiatives

- Cybasque.
- International network.
- Strategic allignment to Spain and Europe.
- Visibility and promotion.



Creating the future for the sector




Visibility and promotion: Team building

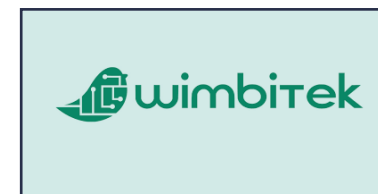
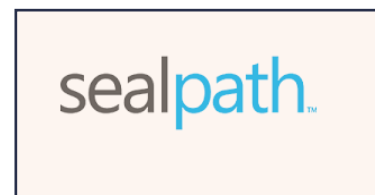
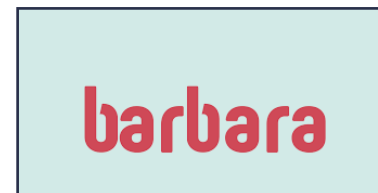
- Inaugural local event in 2018.
- Side event at RSAC (2019 and 2020).
- Pavillion at It.sa (2019).
- Members of ECSO Board (2021).
- European Cybersecurity Investment Platform (2022).
- FIRST Regional Symposium Europe (2023)
- European Cybersecurity StartUP Award (2023)



Creating the future for the sector

How we impacted on cybersecurity startups landscape

-  ICS Cyber
-  Industrial use cases
-  Talent development



Attracted in 2023

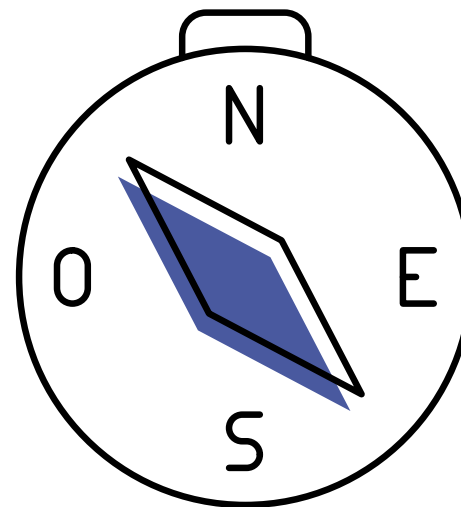


What is next?

What is next?

Institutional context

- Very complex and fragmented public sector.
- Cybercrime is growing.
- BCSC was very limited in its powers.
- More resources are necessary.



What is next?

Alignment strategy for public capacities

National Cybersecurity Strategy

- Objective 1, Line 2, Measure 4

Promote, within the framework of its powers, the progressive involvement and creation of cybersecurity infrastructures in the Regions and Local Entities that will cooperate and coordinate with national structures in favor of improving national cybersecurity.

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INSTITUTO NACIONAL DE CIBERSEGURIDAD

What is next?

Basque Cybersecurity Agency - Cyberzaintza

National Cybersecurity Strategy

- Objective 1, Line 2, Measure 4

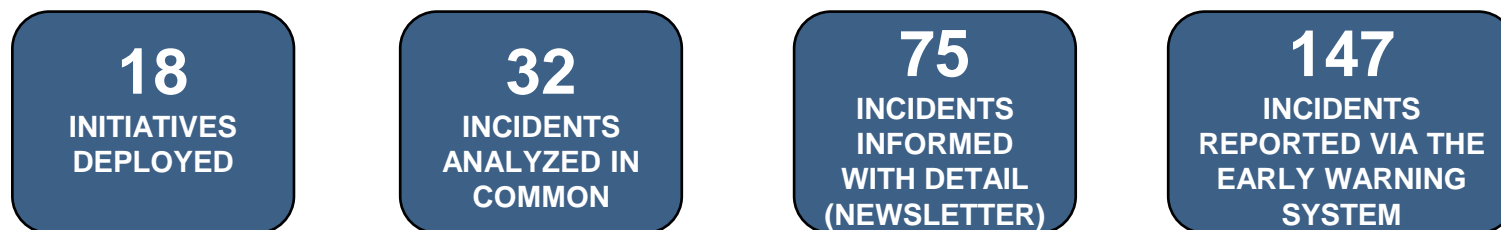
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INSTITUTO NACIONAL DE CIBERSEGURIDAD

What is next?

Local interinstitutional cooperation: Team building

- Members:
 - ❖ Basque Government (Region).
 - ❖ Provincial Councils.
 - ❖ Town councils (more than 40.000 inhabitants).
 - ❖ EUDEL (federation of town councils of the region).

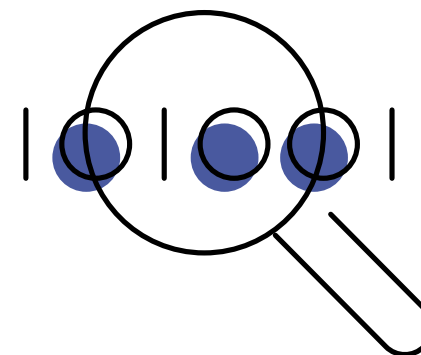


- Periodic joint training cyberexercises are carried out, where different scenarios are recreated.

What is next?

Challenges

- Promote the Cybersecurity in the Basque Country.
- Coordinate initiatives with partners inside and outside the Region.
- Align every effort with the Basque Cybersecurity Strategy.
- Protect public institutions, citizens and companies that manage sensitive infrastructures in the region.
- Develop a common governance for the public sector, guides of good practice and elevate the cybersecurity maturity level.

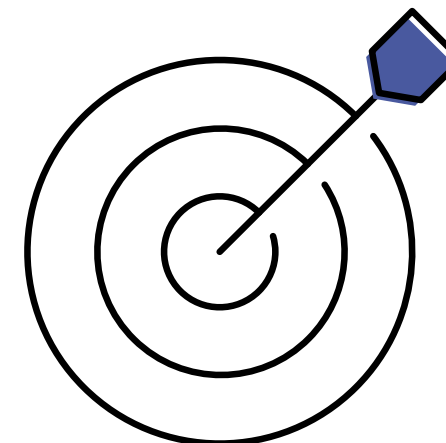


Final thought

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Change the game by...

- Feeling free to create.
- Recruiting your team mates (public and private).
- Identifying the opportunities.
- Generating an intentional outcome, rather than accidental.



Final thought

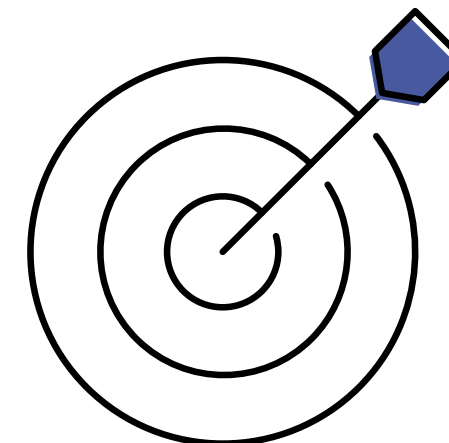
Yes, but, how can the future be shaped?

- Feeling free to create.
 - Avoiding guessing and anticipating trends.
- Recruiting your team mates (public and private).
 - Taking advantage of the initial chaos to create something recognizable.
- Identifying the opportunities.
 - Planning a limited set of aspirational scenarios.
- Generating an intentional – not accidental – outcome.
 - Using a pragmatic approach rather than dreaming.

Final thought

And remember...

If there is no VISION...



...there cannot be any ambition.

Thank you!

