



ANNUAL REPORT

2023

CYBERSECURITY IS EVERYONE'S BUSINESS.

2023 ushered in a new era of cyber threats and trends, from AI-driven social engineering to ransomware-as-a-service to major changes in the cyber insurance market. And, not only are these breaches costly—reaching a record-breaking average of \$9.44 million in the U.S. per IBM—but they have profound impacts on human health and safety. Now pair that with our nation's six-figure deficit of cyber professionals to thwart these attacks, and it becomes mission critical to address this universal risk. The good news is San Diego is leading the charge with more than 1,000 cyber firms, top ranked education and research institutes and the Naval Information Warfare Systems Command (NAVWAR). Our collaborative "Ecosystem in Action," as highlighted by the White House, is developing new technologies, solutions and diverse cyber talent to create a more secure digital community for all.

WORKFORCE



CYBER RESILIENCY



COLLABORATIVE INNOVATION



In collaboration with our members and partners, CCOE made great strides this year in **seeding and diversifying the talent pipeline, increasing regional cyber resiliency and driving collaborative cyber innovation** in our community. We shared best practices and resources and promoted our region's robust cyber ecosystem through the voices of the

industry's leaders. These efforts put San Diego on the map with high-ranking state, national and international leaders, serving as templates to mobilize other regions.

As we look forward to celebrating CCOE's 10th anniversary in 2024, we thank you for all your continued support in advancing the region's cyber workforce, infrastructure and global market share for an industry that impacts 26,000 jobs and invests \$4 billion annually into San Diego's economy – that's equivalent to hosting 24 Comic-Cons for all you fellow Marvel fans. Together, we've helped San Diego's cyber industry grow 167% since CCOE's inception. Here's to our next 10 years!

– Lisa Easterly, *President & CEO*
 Pat Sullivan, *Co-Chairman of the Board*
 Kris Virtue, *Co-Chairman of the Board*



FINANCIALS

The cybersecurity industry impacts **26,000 jobs** and **invests \$4 billion** annually into San Diego's economy.



CCOE is grateful to our members and partners for your continued dedication to growing San Diego's cyber ecosystem and creating a more secure cyber community for all.

REVENUE

Membership, Sponsorship & Grant Revenue

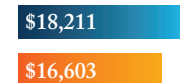


EXPENSES

Programs & Initiatives



Marketing & Communications



Management & Operations



RESERVES

Reserves



*Accounting on accrual basis

FY 2022 FY 2023

HIGHLIGHTS



CHARTING 10-YEAR INDUSTRY GROWTH AND TRAJECTORY



CCOE and San Diego Regional EDC unveiled the 5th biennial **San Diego Cybersecurity Economic Impact Study**. The report sponsored by Booz Allen Hamilton, CyberCatch, ESET, Haiku, RiskRecon and SDSU marks the 10th anniversary of the research that launched CCOE and shows how **cybersecurity is everyone's business**. And the news is good...the San Diego region is now home to more than 1,000 cyber firms, 26,000 professionals and NAVWAR, that generate an annual economic impact of \$4 billion! The Qualcomm-hosted event, attended by 150 industry leaders, featured a star-studded line-up including CISA, Sharp Healthcare and NAVWAR and garnered media coverage from **ABC 10 News**, **San Diego Business Journal**, **San Diego Union-Tribune** and more.

"Firms in every industry face cybersecurity risks. This is driving up the demand for cybersecurity talent and solutions. To keep pace and remain competitive, San Diego must leverage its unique assets, such as the military, as well as its incredibly diverse pool of talent."

Eduardo Velasquez, Senior Director of Research & Economic Development, San Diego Regional EDC



GROWING AN INCLUSIVE CYBER WORKFORCE

As the cybersecurity talent gap continues to grow—to the tune of 55,000 job openings in California and 7,500 here in San Diego—CCOE, EDC and San Diego Workforce Partnership (SDWP) are seeding and diversifying the regional pipeline with **CyberHire**, a program helping underrepresented San Diegans join the field. To date, CyberHire boasts 204 student enrollments (exceeding the 185 target!), 42 participating employers, 5 academic providers, 123 certifications to 63 individuals and 69 employments! CCOE also continues to build a more inclusive workforce with **NFAR Cyber**, an employer-driven cybersecurity neurodiversity training and internship program. The first cohort graduated this summer with a combination of S+, A+ and N+ certifications and hands-on experience in the World of Haiku and now the second cohort is underway! And, CCOE's **Women in Cybersecurity Group**, Girl Scouts San Diego and Greater Than Tech hosted three interactive workshops—featured in the **San Diego Business Journal**—to help 130 girls learn about cybersecurity and career opportunities with pros from Booz Allen, City of San Diego, ESET, First Citizens Bank, Forward Slope, Haiku, INDUS Technology, NAVWAR, SDSU, Sharp Healthcare, Qualcomm and WiCyS.



"CyberHire has greatly contributed to our company's growth over the last two years, and the process has been seamless. When we hire interns as technicians for 30 hours or more per week, CyberHire subsidizes half of their wage for six months. This support significantly aids us in offering full-time positions with benefits to the interns."

Aaron Wyant, President, Dispatch Tech



INTRODUCING THE SAN DIEGO REGIONAL CYBER LAB AND MY E-CISO



The City of San Diego, in partnership with CCOE opened the **San Diego Regional Cyber Lab** in January to provide the region with coordinated cybersecurity through collaborative access to tools, intelligence and training. As part of CCOE's **CADENCE** grant work, we are sharing the Lab plan as a template for cities throughout the state to help create a network of supportive cyber innovation centers.



And, most excitingly, CCOE and the Lab partnered with fellow CADENCE grantee Cal Poly SLO's Digital Transformation Hub and Amazon Web Services to develop **My e-CISO**, a trusted generative AI tool providing scalable cybersecurity assessments and advice capabilities based on NIST and other frameworks, to accelerate the cybersecurity resilience of under-resourced organizations. After months of collaborative development and industry testing, the prototype was unveiled at the Economic Impact Study release and will be made available through the Lab in 2024!

SEEDING THE TALENT PIPELINE



CCOE, EDC and SDWP hosted 9 **Link2Cyber** industry-led events to recruit students into cybersecurity training programs and careers. **CCOE's Job Board** hosted 1,527 applications for 3,853 cyber-related jobs and we are partnering the **Cyber Career Map** with local school districts and nonprofits to support regional cyber curriculum and clubs. With the success of the **Games that Train**, World of Haiku and Haiku Pro (newly designated NIST Diversity & Inclusion Training Tools!), CCOE helped **Haiku** develop Forge Build-Your-Own-Games, Skillz Resume and new educator and employer portals. And, all of these initiatives were showcased at two of the most well-attended breakouts at NICE 2023 and NICE K-12 Cybersecurity Education Conference!

CCOE and the San Diego Regional Cyber Lab, in collaboration with CSUSM, National University and SDSU are standing up a **San Diego Cyber Clinic**, as a member of the **National Consortium of Cyber Clinics**. The goal of the clinic is to teach students how to conduct cyber maturity assessments and perform them for free for underserved small businesses and local agencies, providing hands-on learning for the students

"We have a national shortage of cyber workers—to the tune of 663,000 in the U.S. per **Cyberseek**. Opening the aperture with accessible and skills-based training helps seed and diversify the talent pipeline, which is critical to advancing our country's homeland security."

Joseph Oregon, Chief of Cybersecurity, Region 9, Cybersecurity and Infrastructure Security Agency (CISA)

and increasing regional cyber resilience. CCOE is spearheading the regional application for the Google Cybersecurity Clinics Fund.





RAISING CYBERSECURITY AWARENESS AND RESILIENCY

CCOE is partnering with the cities of **San Diego** and **Carlsbad** to help small businesses in the City of San Diego and North County areas increase their cybersecurity awareness and preparedness to bolster business resiliency in our community. The program includes an FBI Executive Briefing and each participating company is offered ESET Cybersecurity Employee Training, Mastercard RiskRecon Cybersecurity Assessments, CyberCatch Cyber Incident Response Simulator and connectivity to San Diego's cyber industry at no cost to participants. To date, the program has served 100 businesses and the collaborative regional case study was shared with the Mastercard



City Possible Global Network of over 500 cities in 50 countries! CCOE also launched a quarterly Cybersecurity Workshop Series with the City of Carlsbad and Carlsbad Chamber of Commerce and a 5-part Webinar and Podcast Series with support from the City of San Diego.



Now in its sixth year, the **FBI Executive Briefing Series** continues to support the bureau's industry engagement efforts and educate San Diego's key sectors on the current risk landscape, mitigation strategies and available resources. The 2023 line-up included tailored programs for the region's Building & Construction, Defense, Legal, Life Sciences, Maritime, Municipalities, IT and Tourism industries. Since inception, we have hosted 38 programs reaching more than 2,500 executives from small businesses to global corporations and helped expand the program to Orange County, Inland Empire and Los Angeles.



SECURING THE FUTURE: CYBERSECURITY STARTUP SUPPORT

CCOE launched the **Member Marketplace**, where CCOE Members can both provide and access discounted cybersecurity-related products, services and support. In tandem, the CCOE **Cyber SMB Advisory Group** is growing to support the region's small to medium-sized cybersecurity companies. We are also fostering partnerships with government and academic innovation centers, California VCs and regional nonprofits to bring new technologies and solutions to market and connect cyber SMBs to established programs and resources.

"CCOE is providing connective tissue between San Diego's cyber ecosystem, startups and the venture community to encourage and nurture the technologies of our future."

— **Eric Basu**, CEO, Haiku



HIGHLIGHTS



MARKETING AND THOUGHT LEADERSHIP

With the help of KCD PR, CCOE secured 31 articles and 9 million impressions (including multiple covers!) highlighting the region's cyber ecosystem and increased our digital community by 19% to connect on industry news and events, best practices, and career and business opportunities. CCOE once again partnered with the **San Diego Business Journal** on a series of quarterly Cybersecurity Panels & Special Reports and hosted the third annual **Cybersecurity Stewardship Awards**. Congratulations to all the finalists and winners!



CCOE's **Cyber Insiders** podcast received a prestigious silver **Davey Award** and featured two series, The Business of Cybersecurity highlighting the evolving cybercrime, legal, insurance, banking and communications landscape as well as Lessons from the Trenches of target industries like Energy, Manufacturing, Emerging Tech and more. Check out the latest episodes now streaming on all platforms.

"San Diego and Carlsbad rank as top 2 digital cities in the U.S. for using technology to strengthen cybersecurity, tackle social problems, enhance services and more."

**Center for Digital Government
2023 Digital Cities Survey**

CCOE also shared the region's expertise and collaborative efforts with industry, academic and government audiences at more than 30 partner events and conferences around the country, including: NICE 2023, CA Defense Summit, Air Show Innovation Zone, NDIA SoCal Cyber Cup, IC3, Raices CyberCon, WiCyS Career Day, BlueTech Week...and many more! And last but not least, CCOE met with the White House's ONCD, CISA, UASI and DOE to share program templates, serving as model for regional workforce development, innovation and resiliency.



MISSION

Cyber Center of Excellence is a San Diego-based nonprofit dedicated to growing the regional cyber economy and creating a more secure digital community for all.

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