



# ANNUAL REPORT

# 2020





While the pandemic is generating daily headlines of economic strife and workforce reductions, **San Diego's Cybersecurity industry continues to grow to protect our data, technology, critical infrastructure and national security.** The sharp rise in remote working, distance learning and connected devices creates new security risks that are propelling next generation capabilities like artificial intelligence, machine learning and 5G. With the global shortage of cybersecurity professionals cresting over 3.5 million and 300,000 unfilled job in the U.S., it's prime time to seed the talent pipeline for this critical industry.

With the unwavering support of our Members in this challenging year, CCOE continued the momentum in **workforce** development, creating **new business opportunities** and fostering **collaboration** in the cyber community. We shared best practices and resources in our **COVID Cyber Safety Guide** and promoted our region's vibrant cyber ecosystem through the voices of the industry's leaders.

-  WORKFORCE
-  NEW BUSINESS OPPORTUNITIES
-  COLLABORATION

These collaborative efforts between industry, academia and government put San Diego on the map with high-ranking state, national and international leaders and are serving as templates to mobilize other regions.

We thank you for your continued support in advancing the region's cyber workforce, infrastructure and global market share for an industry that impacts 19,660 jobs and invests \$2.2 billion into San Diego's economy.

Here's to our next milestones in brighter days ahead!

– Retired Rear Admiral Ken Slaght  
*CCOE Chair and President*

# FINANCIALS

CCOE is grateful to our members and partners for your continued support during this challenging year and for your unwavering dedication to growing San Diego's cyber ecosystem and creating a more secure cyber environment for all.

## REVENUE

Membership, Sponsorship & Grant Revenue

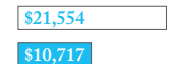


## EXPENSES

Programs & Initiatives



Marketing & Communications



Management & Operations



## RESERVES

Reserves



*\*Accounting on accrual basis*

Legend:  FY 2019     FY 2020



The cybersecurity industry impacts **19,660 jobs** and invests **\$2.2 billion** into San Diego's economy



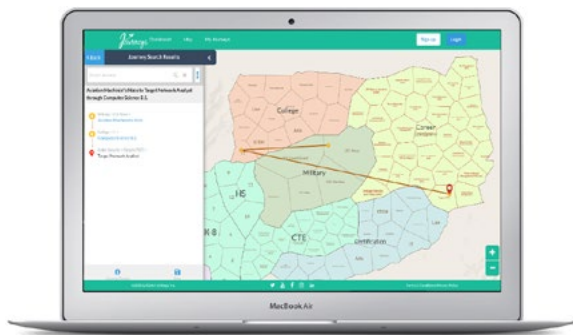
# HIGHLIGHTS

## BOLSTERING CALIFORNIA'S CYBER RESILIENCY AND WORKFORCE



CCOE is an awardee of the CASCADE II grant from the U.S. Department of Defense (DoD), led by the California Governor's Office of Planning and Research, to strengthen the state's defense supply chain, innovation capacity and workforce. CCOE's grant deliverables include expanding the **Cyber Career Map** as well as hosting the Link2Cyber program, Defense FBI Briefings and a 10-part podcast series with iHeartMedia.

As part of these efforts, we are excited to launch the new and improved Cyber Career Map featuring an interactive dashboard, skills and interest assessments, community college catalogs and military to commercial tracks. We are also working with fellow CASCADE grantee, San Diego East County EDC and Journeys Map on new work-based-learning tracks and resources.



"CCOE brings a fresh approach to collaborative cyber resiliency and workforce development, creating scalable templates to mobilize other regions in our state."

– Eileen Sanchez, CASCADE Director, California Governor's Office of Planning and Research

## MARKETING AND COMMUNICATIONS

CCOE and KCD PR are excited to produce **Cyber Insiders**, a 10-part Podcast Series as part of the CASCADE II Grant. The series tells the story of California's cyber economy, current threat landscape, protection and risk management strategies, cyber innovations and workforce needs. Our very own Kevin Dinino, KCD PR hosted the podcasts, featuring cyber leaders from CA Guard, FBI, ESET, GoSecure, EY, Cooley, Sentek, NAVWAR, FICO, Qualcomm, Sharp Healthcare, Teradata, Journeys Map, Booz Allen Hamilton, CSUSM and more.

CCOE also secured 9 stories highlighting the region's cyber prowess and increased our digital community by 14% to connect on industry news and events, best practices and career and business opportunities.



"San Diego is a Top 10 global cybersecurity hub...famous for its military presence."

– CSO Online



## SEEDING AND DIVERSIFYING THE TALENT PIPELINE

The U.S. cyber industry faces a six-figure deficit of cyber workers. Representing only 20% of the workforce, women, minorities and neurodiversity are the keys to bridging the gap. With support from the ESET Foundation, CCOE is proud to partner with the National Foundation for Autism Research to pilot a cybersecurity neurodiversity training and internship program for adults with cognitive exceptionalities. Our Women in Cyber Advisory Group is working with the Girl Scouts and SynED on a series of workshops for girls to learn about cybersecurity and earn their cyber badges – with over 70 attendees at the initial virtual **events!** And, CCOE is partnering with NAVWAR on a regional apprenticeship program with San Diego's community colleges to engage underrepresented students in work-based learning roles.

**CCOE's Job Board** hosted 2,556 applications for 1,162 jobs this past year. CCOE and San Diego Regional EDC also continued the Link2Cyber program with San Diego's universities. The virtual panels featured San Diego's cyber leaders discussing in-demand skill sets, career pathways and opportunities during the pandemic, reaching more than 420 college students!

"CCOE's inclusive approach to the cyber talent deficit is a win-win! It provides the industry with untapped resources AND offers life changing career opportunities for non-traditional candidates."

– Juan Leon, Founder and Board President, National Foundation for Autism Research

## FBI EXECUTIVE BRIEFING SERIES

CCOE celebrated our third year of the FBI Executive Briefing Series 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 2020 line-up included tailored programs for the region's Cleantech, Defense, Life Sciences and Wealth Management industries.

"The FBI values our strategic partnership with CCOE to enhance communication with San Diego's business leaders to promote effective exchange of intelligence to detect, prevent, and protect the region's assets, proprietary infrastructure, and employees from cyber and counterintelligence threats."

– Omer Meisel, Assistant Special Agent in Charge, FBI San Diego



## STRENGTHENING NATIONAL SECURITY INNOVATION

CCOE's successful engagement in the CASCADE II grant led to a new opportunity with the State of California Governor's Office of Planning and Research to participate in the U.S. Department of Defense's **Defense Manufacturing Communities Support Program** as a member of the California consortium titled CADENCE – one of six national DMC designees. CCOE's project includes the development of a Cyber Innovation Center to support DoD's modernization priorities in cybersecurity, 5G, and AI and ML technologies, as well as workforce development, research and analysis, knowledge sharing and scaling.



CCOE and SD-LECC submitted a proposal for San Diego to be one of the **Army Cyber Institute (ACI)'s Jack Voltaic** pilot cities. Our exercise focuses on simulating the force projection capabilities of the military without access to power and vulnerabilities in the 5G network. The pandemic has extended the review process, but ACI connected us with the San Antonio and USCC teams, and we are now exploring the first joint cities pilot leveraging complimentary technologies and infrastructure.

CCOE also had the honor of briefing DoD's Defense Science Board with NavalX SoCal Tech Bridge on critical infrastructure dependencies and examples of San Diego's collaborative approach.

“On behalf of the Defense Science Board and the members of the Task Force on DoD Dependencies on Critical Infrastructure, thank you for taking the time to talk to our Task Force, especially under these unprecedented circumstances. Your remarks on San Diego's collaborative ecosystem provided insight and information that substantively will help shape the foundation of our study.”

– DoD Dependencies on Critical Infrastructure Task Force Co-Chairs

# HIGHLIGHTS



## GLOBAL THOUGHT LEADERSHIP

With support from Qualcomm and NAVWAR, CCOE celebrated National Cybersecurity Awareness Month with the webinar “**The Great Reset: Geopolitical Risk & Global Strategies Amid Crisis.**” Washington D.C. geopolitical strategist John Sitolides, a diplomacy consultant under contract to the U.S. Department of State, provided sharp insights into the future of U.S.-China relations, global 5G technology and cybersecurity competition, and a broad spectrum of high-stakes geopolitical challenges around the world. More than 300 San Diego business leaders watched live!

CCOE and the World Trade Center hosted international delegations with the Consulate General of Ireland and the Merage Israeli Institute to showcase San Diego's cyber ecosystem and explore best practices, industry trends and potential collaborations.

“Collaborative innovation ecosystems across industries, as San Diego has skillfully cultivated, are key to maintaining U.S. dominance in the global technology competition.”

– John Sitolides, Geopolitical Strategist, Trilogy Advisors

## ADVANCING ARTIFICIAL INTELLIGENCE AND MACHINE LEARNING

As CCOE's **San Diego Cybersecurity Economic Impact Study** indicated, AI and ML is a growing focus within San Diego's cyber community and is burgeoning into the region's hottest innovation cluster. CCOE and San Diego Regional EDC convened AI and ML leaders across sectors to better understand the challenges and opportunities facing the industry. These efforts have led to the launch of the AI and ML economic impact study series in critical industries with the **first report** released in December and Cyber AI planned for 2021, supported by the CADENCE grant.

“The proliferation of AI and ML technologies promises to be a transformative force for businesses worldwide—and like in many innovative industries—San Diego is at the forefront. This study helps paint a picture of the impact of AI, proving its potential to grow jobs and even help narrow gender and racial wage gaps.”

– Mark Cafferty, President and CEO, San Diego Regional EDC



# MISSION

Cyber Center of Excellence is a non-profit dedicated to accelerating the region's cyber economy and positioning it as a global hub of cyber innovation.

# CONTACT CCOE

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