

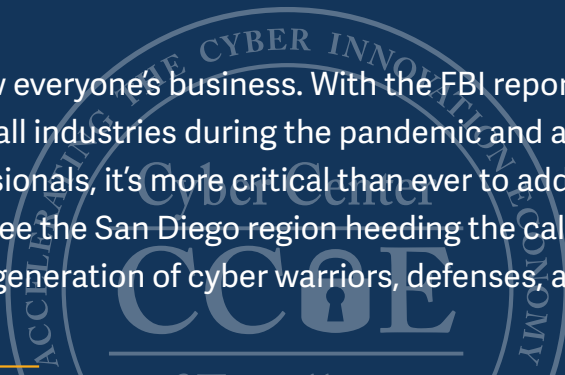


# ANNUAL REPORT

# 2021



Cybersecurity is now everyone's business. With the FBI reporting a 300% increase in cybercrimes across all industries during the pandemic and a global shortfall of 3.5 million cyber professionals, it's more critical than ever to address this systemic risk. We are so proud to see the San Diego region heeding the call and working together to develop the next generation of cyber warriors, defenses, and innovations.



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 and promoted our region's vibrant cyber ecosystem through the voices of the industry's leaders.

WORKFORCE

NEW BUSINESS OPPORTUNITIES

COLLABORATION

These efforts put San Diego on the map with high-ranking state, national, and international leaders and are serving as templates to mobilize other regions. So, what's our special sauce? It's the collaboration between the private sector, academia, and government. Together, we've helped San Diego's cyber industry grow by 15% during the pandemic and incubate next generation capabilities in AI and machine learning!

We thank you for your continued support in advancing the region's cyber workforce, infrastructure, and global market share for an industry that impacts 24,000 jobs and invests \$3.5 billion into San Diego's economy.

Here's to our next milestones!

– Lisa Easterly  
CCOE President & CEO



# FINANCIALS

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 environment for all.

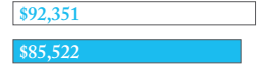
## REVENUE

Membership, Sponsorship & Grant Revenue

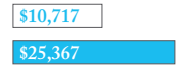


## EXPENSES

Programs & Initiatives



Marketing & Communications



Management & Operations



## RESERVES

Reserves



\*Accounting on accrual basis

FY 2020 FY 2021

The cybersecurity industry impacts **24,000 jobs** and invests **\$3.5 billion** into San Diego's economy.

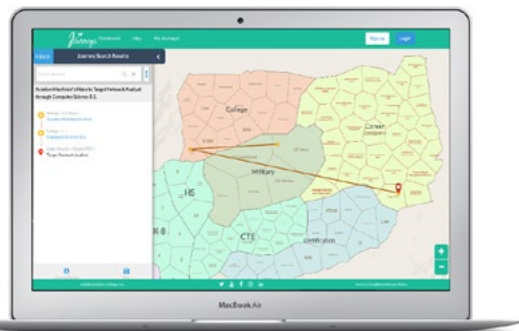


# HIGHLIGHTS

## BOLSTERING CALIFORNIA'S CYBER RESILIENCY AND WORKFORCE



CCOE completed the **CASCADE II grant** from the U.S. Department of Defense, led by the California Governor's Office of Planning & Research, to bolster the state's defense supply chain, cybersecurity, innovation capacity, and workforce. CCOE's deliverables included the new and improved **Cyber Career Map**, now featuring military to commercial tracks, work-based learning resources, integration of the Haiku Cyber Range, new curriculum and trainings, skills and interest assessment, and so much more!



"CCOE's collaborative approach to cyber resiliency and workforce development is now serving as a template to mobilize not just other regions in our state, but across the country."

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



## 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**. CCOE's project includes the development of a state-wide Consortium and regional Cyber Lab to support DoD's modernization priorities in cybersecurity, 5G, and AI/ML technologies, as well as workforce development, research and analysis, and mechanisms for knowledge sharing and scaling. CCOE is working in tandem with the City of San Diego, San Diego Law Enforcement Fusion Center (SD-LECC), InfraGard, and other critical infrastructure partners to assemble the Technical and Executive Boards to oversee development and management of the Cyber Lab launching in early 2022, with support from CADENCE and the City of San Diego's U.S. DHS grant.

"With cybersecurity threats becoming more frequent and sophisticated, we must make sure we're doing everything we can to stop these attacks in their tracks," said Mayor Todd Gloria. "The new Cyber Lab will serve as a regional resource where information and prevention strategies can be securely shared between agencies, especially with smaller agencies that don't have in-house expertise. This will help keep our region's cyber presence safe and secure."

– Todd Gloria, San Diego Mayor



## SECURING THE FUTURE: AI AND SAN DIEGO'S CYBER INDUSTRY STUDY

CCOE and San Diego Regional EDC unveiled the second in a study series on the proliferation of artificial intelligence (AI) and machine learning (ML) across San Diego County's key economic clusters. Underwritten by Booz Allen Hamilton, the study quantifies the economic impact of the region's Cybersecurity cluster and explores the proliferation of AI and ML technologies. And the news is good...the region is now home to more than 870 cyber firms and 12,400 cyber professionals that generate an annual economic impact of \$3.5 billion (15% increase since the 2019 Cyber industry study!). And, these cyber firms are developing AI at a rate of 2.5 to three times the regional average. CCOE and EDC held the release **event** in June, attended by more than 100 business leaders and attracting media coverage from **Yahoo! Finance**, **San Diego Union Tribune**, and **San Diego Business Journal**. Check out the **report** for helpful stats and resources!

"It should come as no surprise that San Diego is at the heart of transforming the defense industrial base leveraging today's latest technology, while working to mitigate the risks inherent to increased connectivity and data-centric decision making."

– Jennie Brooks, Senior Vice President, Booz Allen Hamilton



## CONNECTING GLOBAL BUSINESS OPPORTUNITIES

CCOE and the World Trade Center San Diego hosted delegations with Enterprise Ireland and Cyber Ireland, Consulate General of Canada, San Diego Diplomacy Council, and the U.S. Department of Defense's Committee on Foreign Investment to showcase San Diego's cyber ecosystem and explore best practices, industry trends, and potential collaborations.

"San Diego's cyber industry is a great example of how businesses, academia, and government can collaborate on systemic solutions to global risks."

– Robert O'Driscoll, Consul General of Ireland



# RAISING CYBERSECURITY AWARENESS & PREPAREDNESS



CCOE is partnering with **City of Carlsbad** to provide basic cybersecurity training to Carlsbad small businesses, vulnerable to cyber threats at a time when they are also economically impacted by the pandemic. The initial one-year pilot targets up to 250 small businesses identified by the City of Carlsbad to participate in multiple cohorts. CCOE is providing the cohorts with an FBI Executive Briefing and each participating company is offered Mastercard RiskRecon Cybersecurity Snapshot Reports, ESET Cybersecurity Awareness Employee Training, and connectivity to San Diego's cyber industry at no cost to participants. The collaborative case study will be shared with the Mastercard City Possible Global Network of over 500+ cities in 50+ countries! CCOE is launching similar efforts with the **City of Vista** and will continue to scale the program and create a replicable model for other regions.

CCOE celebrated our fourth 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 2021 line-up included tailored programs for the region's Advanced Manufacturing, AI and Machine Learning, Defense, Finance, and Maritime industries. Since inception, we have hosted 18 programs reaching more than 800 executives from small businesses to global corporations!



“The City of Carlsbad is delighted to partner with CCOE to support our small businesses and critical supply chains, by increasing cybersecurity awareness AND regional resiliency.”

– Matt Sanford, Economic Development Manager, City of Carlsbad

## MARKETING AND COMMUNICATIONS

CCOE and the San Diego Business Journal launched the inaugural Cybersecurity Stewardship Awards celebrating companies, academic institutions, municipalities, government agencies, nonprofits, and the Cybersecurity Executive of the Year going above and beyond to innovate new technologies and solutions, seed and diversify the talent pipeline, and create a more secure San Diego. Congratulations to the finalists and winners, who set the bar high!



CCOE and KCD PR hosted two new 5-part series on **Cyber Insiders**. The podcasts feature cyber leaders from industry, academia, and government discussing the anatomy of recent cyberattacks as well as ideas for seeding and diversifying the talent pipeline. Check out the latest episodes now streaming on all platforms!

With the help of KCD PR, CCOE also secured 20 articles highlighting the region's cyber prowess and increased our digital community by 54% to connect on industry news and events, best practices, and career and business opportunities.

“San Diego County's cybersecurity cluster is an economic giant and a growth engine. The economic impact of the cybersecurity sector is the same as 9 Super Bowls or 23 Comic-Cons.”

– San Diego Business Journal Cybersecurity Special Report, June 2021

# HIGHLIGHTS



## SEEDING AND DIVERSIFYING THE TALENT PIPELINE

The U.S. cyber industry faces a six-figure deficit of cyber workers. Representing only 20 percent of the workforce, women, minorities, and neurodiversity are the keys to bridging the gap. CCOE, San Diego Workforce Partnership and San Diego Regional EDC are partnering with regional cyber employers and colleges to launch **CyberHireSD**, a program designed to help 180 underemployed San Diego workers join the field. With support from the ESET Foundation, CCOE is proud to partner with the National Foundation for Autism Research to pilot **NFAR Cyber**, 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. 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 9,490 applications for 2,191 jobs this past year. CCOE and San Diego Regional EDC also continued the **Advancing San Diego 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, reaching more than 400 college students!

“With so many cybersecurity jobs in the region and high unemployment due to COVID-19, it is imperative that all people in our communities have equal access to tools, resources, education, and job opportunities to help them launch meaningful careers and provide for their families.”

– Peter Callstrom, CEO, San Diego Workforce Partnership



# MISSION

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

# CONTACT CCOE

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