



# ANNUAL REPORT 2025





# Cyber heroes unite!




While 2025 brought a wave of new trends and threats—from the double-edged sword of AI to evolving ransomware and sophisticated supply chain attacks—it also brought unprecedented opportunities to strengthen our defenses. And even as breaches grow costlier, averaging a record \$10 million in the U.S. per IBM, we’re seeing deeper recognition of their impact on our health, safety, and daily lives. With our nation still facing a six-figure deficit of cyber professionals to thwart these attacks, it’s more important than ever to rally together, grow our workforce, and address this universal risk.

We are so proud that San Diego is leading the charge with more than 1,350 cyber firms, top-ranked education and research institutes, and the Naval Information Warfare Systems Command (NAVWAR). Our collaborative cyber ecosystem is developing diverse cyber talent, new technologies, and replicable programs to create a more secure digital world.

WORKFORCE

CYBER RESILIENCY

COLLABORATIVE INNOVATION



Together with our members and partners, CCOE made great strides this year in expanding the talent pipeline, increasing regional cyber resiliency, and driving collaborative cyber innovation in our community. We celebrated some of our most ambitious initiatives to date including the first anniversaries of the San Diego Cyber Clinic and My eCISO and showed how the region’s cybersecurity industry continues to expand, adding jobs, companies, and economic impact in our

sixth biennial Economic Impact Study. These efforts earned CCOE the **FBI Director’s Community Leadership Award** and continue to serve as templates to mobilize regions across the globe.

As we reflect on 2025 and look forward to the year to come, we are reminded that community remains at the heart of everything we do. And we are incredibly grateful to be a part of yours. Thank you for helping us advance the region’s cyber workforce, infrastructure, and global market share for an industry that impacts 29,000 jobs and invests \$4.3 billion into our economy. For San Diego, by San Diego!

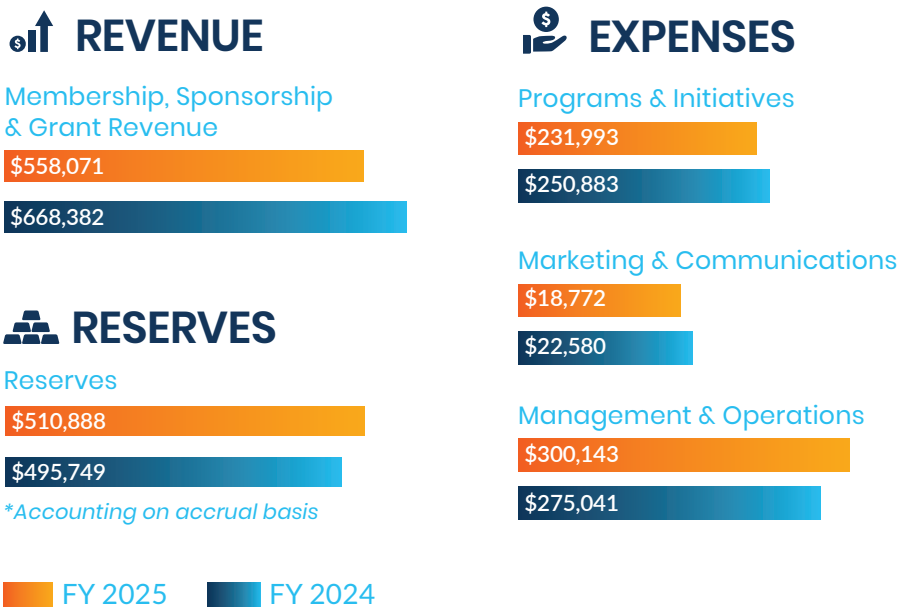
Lisa Easterly, CCOE President & CEO  
Andy Haass, CCOE Co-Chairman  
Kris Virtue, CCOE Co-Chairman



Team CCOE: Kris Virtue, Jim Skeen, Lauren Gicas, Lisa Easterly, Victor Ramsauer and Andy Haass

# FINANCIALS

CCOE is grateful to our members and partners for your continued dedication to growing the regional cyber economy and creating a more secure digital community for all.



The cybersecurity industry impacts 29,000 jobs and invests \$4.3 billion annually into San Diego’s economy.





# HIGHLIGHTS



## Happy 1<sup>st</sup> Anniversary San Diego Cyber Clinic!



**SDSU**



CCOE, CSUSM, National University, and SDSU celebrated the **San Diego Cyber Clinic's** first year of operations, with support from [Google.org](#) and [The Consortium of Cybersecurity Clinics](#) with a bash at Snapdragon Stadium during Cybersecurity Awareness Month. This awesome new resource offers free cybersecurity services to the community and provides hands-on experience for students. And what a year it's been, with the Clinic already supporting over 40 businesses, 18 faculty, and 220 students! Check out

the [Clinic offerings](#)—from cybersecurity risk assessments to incident response planning to product evaluations, and more—and explore how we can help your organization.

*"Navigating the recent increase in disruptive cyber attacks on essential services—from local power grids to hospitals—will rely on a strong cyber workforce capable of defending against everyday threats. The San Diego Cyber Clinic is a crucial part of this effort: it gives students the hands-on experience they need to start careers, while at the same time providing vital, no-cost security services to local organizations that need them most. It's a smart investment in both our workforce and the critical infrastructure that communities depend on."*

Maab Ibrahim, Head of Economic Opportunity for the Americas, Google.org.



## Charting Industry Growth and Trajectory

CCOE and San Diego Regional EDC released "[For San Diego, By San Diego: 2025 Cybersecurity Industry Economic Impact and Workforce Study](#)," sponsored by Thales, Deloitte, ESET, Levitzacks, and NDIA San Diego. Now in its sixth update since 2014, this biennial report highlights how San Diego's cybersecurity cluster is fueling innovation, safeguarding critical industries, and creating high-paying jobs that strengthen our region's digital future. Even as the broader technology industry contracts, San Diego's cybersecurity landscape is a beacon, supporting: \$4.3B annual economic impact, 1,350 cybersecurity companies, 29K+ regional jobs, 15K direct cybersecurity roles, and 4,200 cyber-related degrees conferred annually!



*"San Diego's cyber cluster remains a bright spot for our region, during a period of continued economic uncertainty. However, we must not take it for granted. We can continue to support its growth by connecting cybersecurity companies to new customers, more suppliers, and diverse talent that is necessary to thrive."*

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



## Bridging the Talent Gap

As the cybersecurity talent gap continues to grow—to the tune of 514,000 openings in the U.S. and 5,500 here in San Diego—CCOE and our partners continue to expand the talent pipeline with programs like [CAREERworks](#), [CyberHire](#), [GenCyber](#), and [Veteran and Spouse Grant Program](#). This summer, CCOE also worked with SDCOE and the San Diego Regional Cyber Lab to host an impactful [summer internship program](#) for underserved students with hands-on access to tools and cyber experts. We also hosted workshops with the Boys & Girls Club and the Girl Scouts for more than 200 students to learn about cyber safety and careers led by 24 industry pros.

*"You can see the spark when the Girl Scouts realize cybersecurity isn't just about technology — it's about protecting people and shaping a safer digital future. It's incredibly rewarding to help plant those seeds of confidence and possibility."*

Marissa Pitchford, Head of Corporate Social Responsibility, ESET North America



*"I got to meet amazing people who introduced me to a career path."*

Senior Girl Scout

We added new employer features to the [Cyber Career Map](#) with Journeys Map and worked with local school districts and nonprofits to support regional cyber curriculum and clubs, including anchoring the first cybersecurity pavilion at the seventeenth annual San Diego Festival of Science & Engineering with 21,000 attendees. And, CCOE and Haiku are integrating the immensely popular [Games that Train](#) into cyber curriculum and upskilling pilots across the country with more than 40,000 users!



## Powering Collaboration with Secure SD

CCOE launched **Secure San Diego 3.0**, building on the initial regionwide incident response planning and City-sponsored awareness and preparedness programs. CCOE convened an all-star advisory group to meet monthly and help develop a coordinated playbook to connect local government, federal agencies, critical infrastructure, academia, and industry—maximizing regional readiness and public education. We'll also leverage current resources like the San Diego Cyber Lab and Cyber Clinic and explore new collaborations like regional tabletops, exercises, cyber volunteer corps, and PSA campaigns in the New Year.

*"San Diego and Carlsbad rank in the top 10 for incorporating community feedback into their plans, ensuring responsible AI use, maturing their data programs, and navigating challenges without sacrificing service."*

Center for Digital Government 2025 Digital Cities Survey



# HIGHLIGHTS



## Raising Cybersecurity Awareness and Resiliency

CCOE is celebrating the eighth year of the **FBI Executive Briefing Series** to support the bureau's industry engagement efforts and educate San Diego's key sectors on cybersecurity risks and solutions. This year, we expanded the series with sector-specific briefings for the Defense, Cleantech, Legal, Maritime, and Nonprofit industries in partnership with NDIA, SDMAC, Aerospace & Defense Forum, Cleantech San Diego, San Diego County Bar Association, Port of San Diego, San Diego Working Waterfront, TMA BlueTech, U.S. Coast Guard, Navy Gold Coast, and USD's Nonprofit Institute. Since inception, we have hosted 50 briefings reaching more than 3,300 executives from small businesses to global corporations and helped expand the program to Orange County, Inland Empire, Los Angeles, and Hawaii.



CCOE is also proud to be part of **CalSEA**, a new California maritime workforce and supply chain consortium led by El Camino College District and launched at Navy Gold Coast. Through marketing, outreach, and engagement across the Maritime Industrial Base ecosystem, CCOE is helping drive awareness and enrollment in CalSEA's workforce, supplier, technology, and Navy relations programs. Together, these efforts are strengthening the pipeline of talent, innovation, and partnerships critical to advancing California's maritime capabilities.

*"As we continue to experience a high-volume of cyber incidents from criminals and nation state actors, FBI San Diego proudly recognizes the San Diego Cyber Center of Excellence with the DCLA award for putting our communities first. The FBI's ability to carry out its mission depends on the vital support of the public, especially community leaders like CCOE. We applaud them for being at the forefront of the cyber security fight and their commitment to affecting a stronger, safer tomorrow."*

Mark Dargis, Special Agent in Charge of the FBI San Diego Field Office



## Championing Small Businesses and Agencies

The City of San Diego's Regional **Cyber Lab**, in collaboration with CCOE, provides coordinated cybersecurity through access to tools, intelligence, and training. Together, we continued to bolster the region's SLED and business community through quarterly Executive and Technical Stakeholder Committee meetings, newsletters, and Lab events. And, we're advancing cool new tools like **My eCISO**—a conversational AI chat bot that provides free custom cybersecurity evaluations and report cards based on the NIST framework—and gamified Haiku cyber ranges to help under-resourced organizations.



CCOE continues to grow the **Member Marketplace**, a hub where members can connect, collaborate, and tap into exclusive cybersecurity products, services, and support. In tandem, the **Cyber Startup Advisory Group** and **Affiliate Membership Program** champion San Diego's expanding community of emerging cyber companies. By harnessing the expertise of our Board, members and partners, we're forging strategic connections that help startups scale faster, attract investment, and deliver innovative solutions to market.



## Sharing Best Practices and Resources

CCOE secured 25 articles totaling over 500K impressions (including multiple covers and a feature in **Forbes**!) highlighting the region's cyber ecosystem and increased our digital community by 20% 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 fifth annual **Cybersecurity Stewardship Awards**. Congratulations to all the winners and finalists helping keep San Diego cyber safe!



CCOE's **Cyber Insiders Podcast** featured the series **Cybersecurity is Everyone's Business** to share lessons from the trenches of our region's key sectors—including AI, Biomedical Research, Gaming, Gov, Quantum Computing, Software Development, Space, and more—that can be applied to all businesses.

And, CCOE shared the region's expertise and collaborative efforts with industry, academic, and government audiences at more than 25 partner events including: Bluetech Week, Consortium of Cybersecurity Clinics, FBI LinCY, ICARE Sustainability International, InfraGard, ISACA, Navy Gold Coast, NICE Conference, NSA CAE-C Symposium, TechCon, Techno Digital Security Conference, USMC Cyber Exercise, Women in Defense & SDSU Innovation Tour, and many more! Together, San Diego's cyber community is serving as a model for regional workforce development, innovation, and resiliency around globe.



*"You can't beat San Diego for an awesome cybersecurity community."*

Chris Simpson, Director of National University's Center for Cybersecurity



## 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.

## CONTACT CCOE

Cyber Center of Excellence

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