



# 1<sup>st</sup> EUNITY Workshop

Tokyo

Oct 11<sup>th</sup>-12<sup>th</sup> 2017

*Session: Industry considerations*

**Atos**

# Session Agenda

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- Market situation & ECIL recommendations
- Cyberwatching introduction
- Japan cybersecurity capacity building TF.
- Standards / ECSO WG1
- SMEs & cybersecurity / ECSO WG4



# Cybersecurity Market Situation

*Session: Industry considerations*

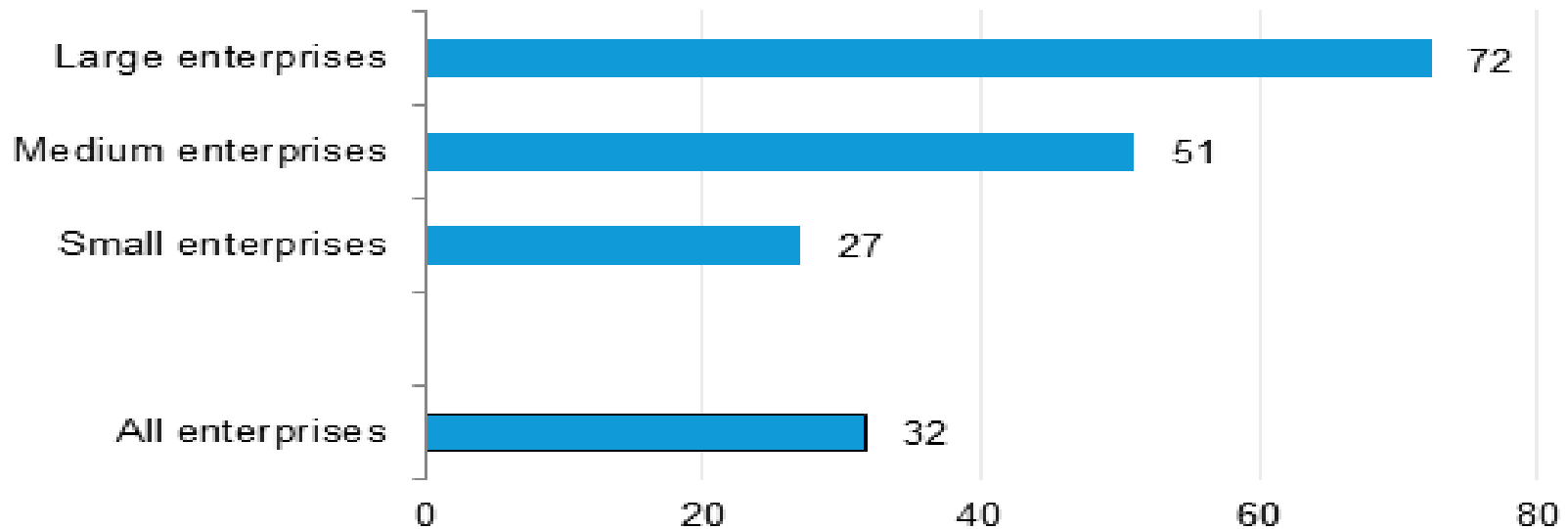
*Pedro Soria-Rodríguez, Atos*

# From challenge to opportunity

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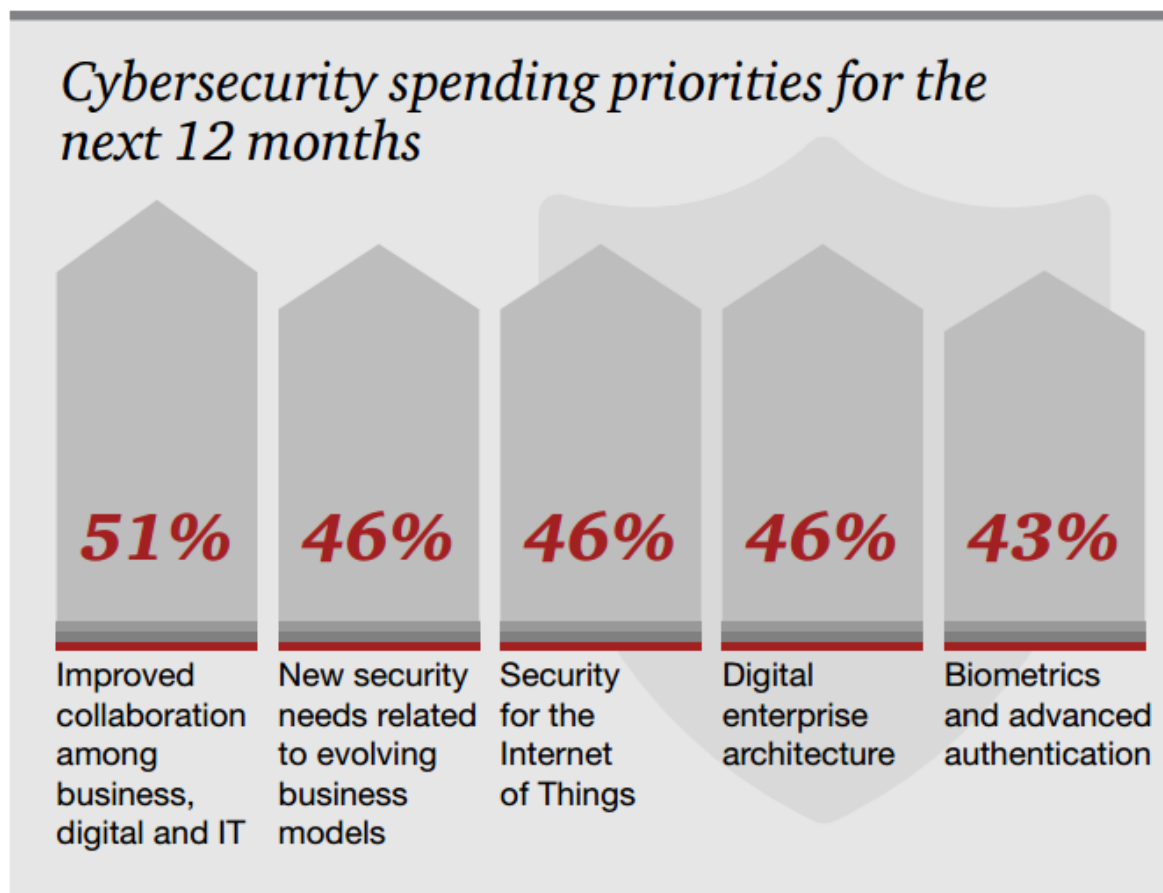
- Transformation in mindsets
- Cybersecurity regarded from a “need” or a “cost” to an opportunity.
- Transformation still to translate into action:

% of companies (globally) with formal ICT security policy defined



# Cybersecurity priorities in industry

## Cybersecurity spending priorities in 2017



Source: PwC, CIO and CSO, *The Global State of Information Security® Survey 2017*, October 5, 2016

# Who leads cybersecurity practice...

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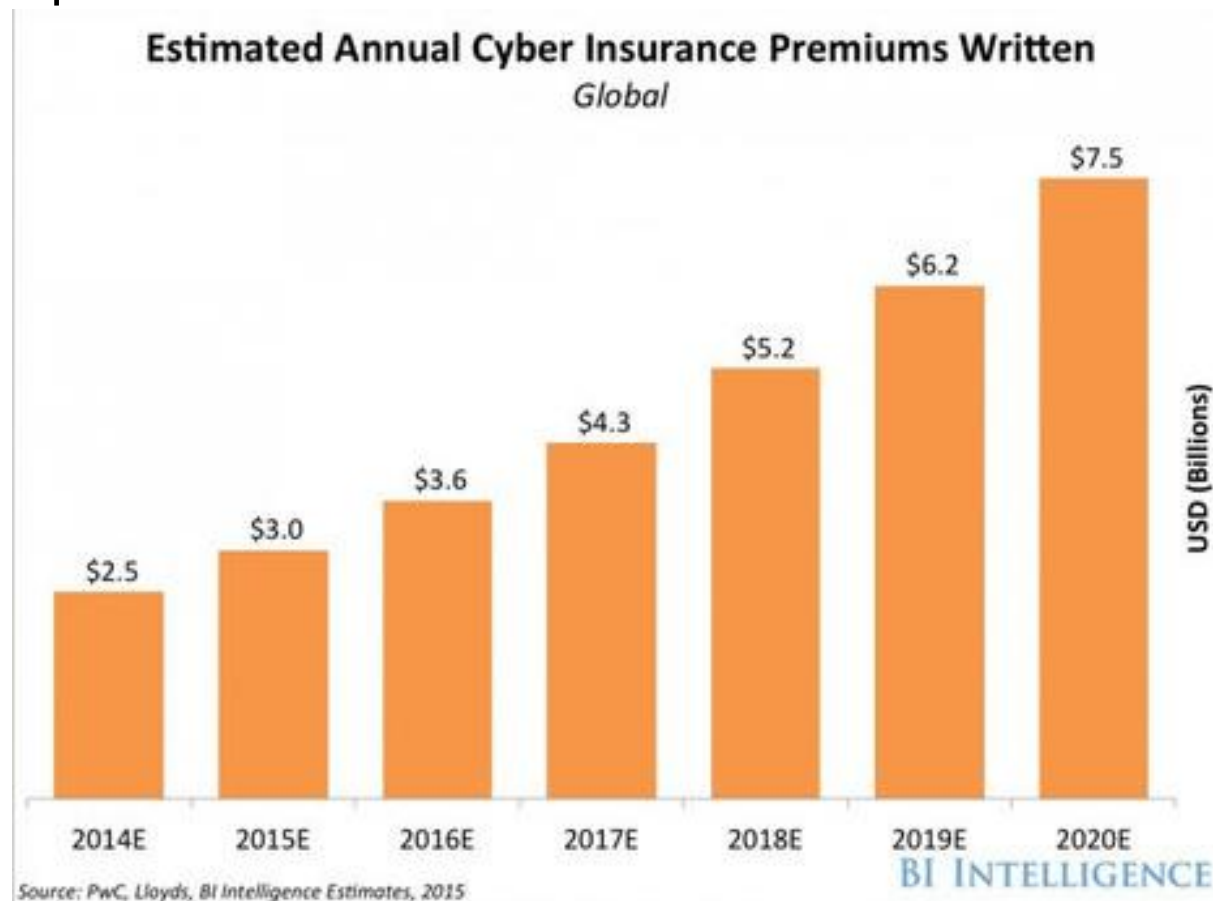
## ■ Not SMEs:

<b>Estimated number of SMEs in the European Union</b>	<b>23 million. 99 out of every 100</b> European businesses are SMEs. With an increasing number expected to become digital businesses, many will need to ensure they are safe on line.
<b>Typical company size</b>	Roughly 93% of SMEs are micro ( < 10 employees) 6% employ between 11 and 49 people. 1% of the SMEs are medium employing between 50 and 249 people.
<b>Priorities</b>	Focusing on core business. No resources for cybersecurity considerations
<b>Level of IT expertise</b>	Fewer than 20% of SMEs in Europe have an IT manager.
<b>Jobs &amp; Growth</b>	SMEs employ 2 in every 3 employees.

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# Who leads cybersecurity practice...

- **Large businesses:** Do have resources and security policies in place but...





## Industry recommendations

*Session: Industry considerations*

*Alicia García Medina, Atos*



# ECIL

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- 09/2014 Com. **Kroes**, responsible for the **Digital Agenda** in Europe, wish a small size working group of **European Industry** as consultant, with the focus on **Cybersecurity**;
- 10/2014 Com. **Kroes** talks with **High Levels** from dedicated **companies**;
- 11/2014 Com. **Kroes** retired; President Juncker nominate Com. **Oettinger**;
- 03/2015 Com. Oettinger initiate a **Round Table** with EU companies in dedicated important **market domains**:
- Automotive, Telecom, Network Infrastructure, IT-Service, Aircraft Industry, Finance Sector, Cyber Lab's and Semiconductor Industry and from a **broad range of countries**:
  - Spain, France, Sweden, Estonia and Germany
- (Atos, Airbus, BBVA, Cybernetica, Deutsche Telecom, Ericsson, Infineon, Thales)

Naming: **European Cybersecurity Industry Leadership = ECIL**

# Recommendations from industry


## ECIL Report

### Recommendation on Cybersecurity in Europe:

- How can the EU be more **trustworthy** and **digitally secure**?
  - Cybersecurity **monitoring** and **advising**
  - Additional **regulatory** measures
  
- How can EU support the successful development on European **Cybersecurity Champions**?
  - Certification pillar: **legislation, standardization** and **labeling**
  - **Cooperation** between MS
  - Supporting **ecosystem** for Cybersecurity
  - Initiatives towards **market consolidation**




**European Cybersecurity Industry Leaders**

Recommendations on Cybersecurity for Europe



How can the EU be more trustworthy and digitally secure?

How can Europe support the successful development of European cybersecurity champions?

A report to M. Günther H. Oettinger European Commissioner for Digital Economy and Society

# Recommendations

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- **Public – private sector cooperation must be reinforced;**
- Sustainable implementation of **CSIRTs** network (as defined in NIS);
- An efficient and valuable **incident sharing/reporting mechanism;**
- Regular **awareness campaigns** for **customers;**
- Foster **certification** and **labelling;**
- Regulatory **sandboxing;**
- **Encryption** should continue to gain more and **more momentum**
- Raising **awareness** and **transparency** for **consumer;**
- **SME´s** transparency become paramount;
- Statement on the new **ENISA-Mandate;**



**Thank you**  
**Any questions?**

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The logo for Atos, featuring the word "Atos" in a bold, blue, sans-serif font. The letter 'o' is stylized with a white dot.

**References:**

Wiser Market Watch Report,

<https://ec.europa.eu/digital-single-market/en/news/commissioner-oettinger-receives-final-report-european-cybersecurity-industrial-leaders>