CYBERSECURITY LUXEMBOURG

LUXEMBOURG CYBERSECURITY ECOSYSTEM

LE GOUVERNEMENT
DU GRAND-DUCHÉ DE LUXEMBOURG
Ministère de l'Économie

SECURITY
MADEIN.LU

LUXINNOVATION
TRUSTED PARTNER FOR BUSINESS

A PROMISING PILLAR
OF LUXEMBOURG'S ECONOMY

Unprecedented growth of digital technologies and their interdisciplinary applications play a predominant role in the development of the today's economy. Digitalization revolutionizes the way to conduct business; it offers enhanced capabilities and allows delivering solutions with an unmatched speed and flexibility, while often reducing overall costs and environmental impacts.

The key competence to benefit from the full potential of digitalization while reducing its inherent risks of safety and security is cybersecurity.

The Ministry of the Economy is at the forefront of cybersecurity developments in Luxembourg, recognizing the societal and economic challenges and opportunities 20 years ago. Today, cybersecurity is fledged with a dedicated national strategy and a self-sustainable ecosystem of cybersecurity service providers, representing a promising pillar of Luxembourg's economy.

You will find herewith the first extensive mapping of the national cybersecurity ecosystem, including an overview of the national governance structure as well as a market analysis of the 300+ companies active in this field in Luxembourg.

Étienne Schneider
Deputy Prime Minister
Minister of the Economy

UNFOLD THE ECOSYSTEM MAPPING

You hold in your hands the first extensive mapping of the Luxembourg Cybersecurity Ecosystem. The A3 poster inside presents a complete overview of all relevant cybersecurity players in the Grand-Duchy.

On the *right side*, you will discover all **304 companies** providing cybersecurity services and products. A special focus on the many **start-ups**, shows the great innovation potential existing in the country.

The *left hand side* covers the public entities active in cybersecurity including their dedicated roles and responsibilities (identified by small tags, representing the legal framework(s) they are officially involved in). A special emphasis is put on **R&D** as a key factor of development for the economy.

In *the middle* of the infographic, you will find the **"Interministerial coordination committee for cyber prevention and cybersecurity"**, the main national governance structure, with the mission to implement the national strategy, bringing together relevant public as well as private players.

METHODOLOGY USED FOR THE ECOSYSTEM MAPPING

✖ Data was gathered using different sources from the Market Intelligence service of Luxinnovation

✖ Each company was then reviewed and classified by SECURITYMADEIN.LU based on the ECSO Cybersecurity Market Radar

✖ Start-ups are defined as follows*:
- Established in Luxembourg
- Less than 5 years old
- < 100 employees (worldwide)
- Provide an innovative product or service

*Based on the EU Start-up Monitor Definition; The criteria related to Employees was added to exclude LU subsidiaries from large corporate groups.

LUXEMBOURG CYBERSECURITY ECOSYSTEM

NATIONAL ACTORS

EDUCATION & RESEARCH

BEE SECURE · cgié centre de gestion informatique de l'éducation · LUXEMBOURG INSTITUTE OF SCIENCE AND TECHNOLOGY LIST

RESTENA · uni.lu UNIVERSITÉ DU LUXEMBOURG · SNT securityandtrust.lu · LCSB

SECTORAL PPPS

INCERT · Infrachain

LU-CIX · LUXITH IT FOR HEALTHCARE

AUTHORITIES & REGULATORS

CAA COMMISSARIAT AUX ASSURANCES · CNPD COMMISSION NATIONALE POUR LA PROTECTION DES DONNÉES

cssf Commission de Surveillance du Secteur Financier · ILNAS Institut Luxembourgeois de la normalisation, de l'accréditation, de la sécurité et qualité des produits et services

ILR INSTITUT LUXEMBOURGEOIS DE RÉGULATION · LE GOUVERNEMENT DU GRAND-DUCHÉ DE LUXEMBOURG Ministère d'État Haut-Commissariat à la protection nationale
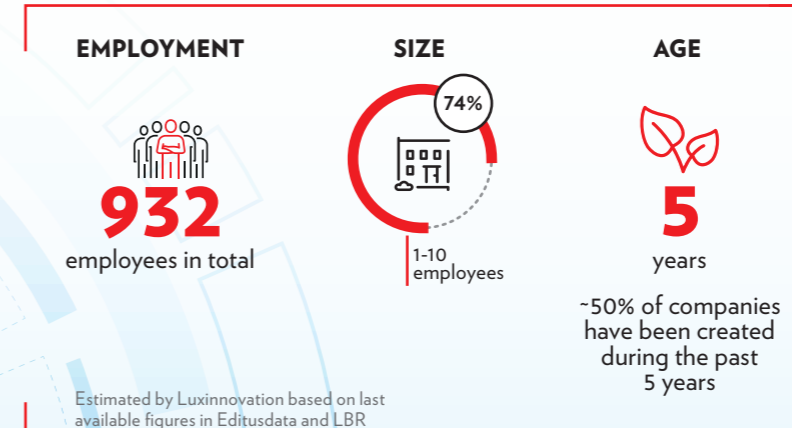
SPECIFIC LEGAL FRAMEWORKS

CIP Critical Infrastructure Protection
(loi du 23 juillet 2016 portant création d'un Haut-Commissariat à la Protection nationale)

GDPR General Data Protection Regulation
(loi du 1er août 2018 portant mise en place du régime général sur la protection des données)

NIS Network and Information Security
(loi du 28 mai 2019 portant transposition de la directive NIS)

PSDC Prestataires de Services de Dématérialisation ou de Conservation
(loi du 25 juillet 2015 relative à l'archivage électronique)

PSF Professionnels du Secteur Financier de Support
(loi modifiée du 5 avril 1993 relative au secteur financier)

NATIONAL STRATEGY & GOVERNANCE

High Commission for National Protection

Departement of Media, Telecommunications and Digital Policy

Ministry of Foreign and Euopean Affairs

SERVING THE PUBLIC SECTOR

ANSSI.lu Agence nationale de la sécurité des systèmes d'information Luxembourg

GOVCERT.lu CERT gouvernemental Luxembourg

Ctie

INTERMINISTERIAL COORDINATION COMMITTEE FOR CYBER PREVENTION AND CYBERSECURITY

Ministry of the Economy

Directorate of Defence

State Intelligence Service

ILR INSTITUT LUXEMBOURGEOIS DE RÉGULATION

COMPANIES

74 COMPANIES WITH CYBERSECURITY AS A CORE BUSINESS

EMPLOYMENT	SIZE	AGE
932 employees in total	**74%** 1-10 employees	**5** years ~50% of companies have been created during the past 5 years

Estimated by Luxinnovation based on last available figures in Editusdata and LBR

SERVING THE PRIVATE SECTOR

c3 Cybersecurity Competence Center LUXEMBOURG

cases.lu Cyberworld Awareness and Security Enhancement Services LUXEMBOURG

circl.lu Computer Incident Response Center LUXEMBOURG

SECURITY MADEIN.LU

304 companies
24%
22%

68 START-UPS

START-UPS REPRESENT MORE THAN 20% OF THE NATIONAL CYBERSECURITY ECOSYSTEM

CORE BUSINESS
35%
One third of start-ups have cybersecurity as a core business

TOP 3 SOLUTIONS OFFERED
1. Identity management
2. Governance, risk & compliance
3. Encryption

57% of start-ups are or have been hosted in a Luxembourg incubator

DIVERSIFIED SOLUTIONS

Luxembourg companies mainly specialised in risk identification and systems protection

- 29% Identify
- 50% Protect
- 8% Detect
- 9% Respond
- 4% Recover
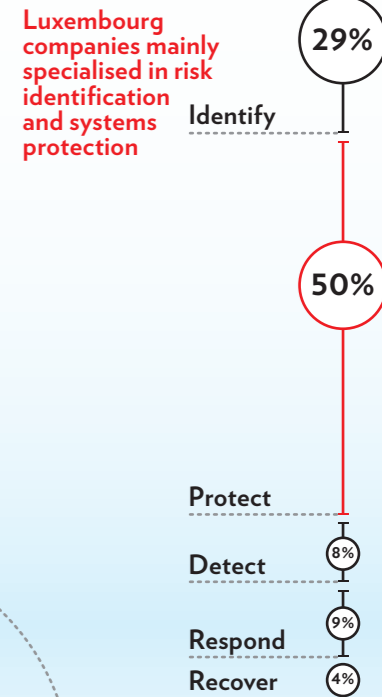
TOP 7 SOLUTIONS

COVER 60% OF THE NATIONAL MARKET*

1. Governance, risk & compliance
2. Identity & access management
3. Data security
4. Asset management
5. Penetration testing
6. Backup & storage
7. Awareness & training

THANK YOU!

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TRUSTED PARTNER FOR BUSINESS

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