

ECSO CYBERSECURITY MARKET PULSE

Arnaud de Vibraye
Manager for Invest4Cyber
arnaud.de.vibraye@ecs-org.eu



GLOBAL GLIMPSE

- Part of EU's New €1.3 Billion Investment Going to Cybersecurity ([Security Week](#))
- EU countries miss deadline on cybersecurity rules for critical sectors ([Euractive](#))
- Global M&A Startup Dealmaking Sees Year-To-Year Boost In Q1 ([Crunchbase News](#))
- Cybersecurity Funding Ticks Up Despite Slow Deal Flow ([Crunchbase News](#)).
- Compliance Now Biggest Cyber Challenge for UK Financial Services. ([Infosecurity Magazine](#))
- Cybersecurity: 'AI is fundamentally better for defenders than for attackers', Vasu Jakkal, Microsoft (FR). ([Usine Digitale](#))
- QNu Labs Secures INR 60 Cr in Series A Led by National Quantum Mission to Scale Quantum-Safe Cybersecurity ([Entrepreneur India](#))

EUROPEAN CYBER SCALE-UPS MAKE HEADLINE

- **Sekoia.io** raises €26 Million in Series B to Expand AI-Driven Cyber Intelligence and Operations Access. With this Series B round, the company's total funding reaches €60 million since its founding. [Click here for more information.](#)
- **G+D Ventures and Auriga Partners** invests in **Tremau**, an emerging leader in Trust & Safety whose AI-driven orchestration platform and deep regulatory insights are reshaping how to tackle harmful online content. [Click here for more information.](#)

INVESTORS, WHY THE CYBERSECURITY ECOSYSTEM NEEDS YOU

A still underexploited potential. In 2024, in Europe, US and Israel, cybersecurity startups recorded a substantial increase in capital raised - 29% higher than in 2023 - indicating an upward trend in investor commitment and market confidence within the sector (Tikehau Barometer). However, as digital threats escalate, the European distinctive ecosystem of cybersecurity startups and scale-ups remains largely untapped, representing a strategic opportunity for forward-looking investors. While the European Union and private/public partnerships are accompanying the consolidation of a European cyber market, (regulations, EU fundings and financial vehicles, investments in R&D etc.), the current European ecosystem – 828 companies providing comprehensive threat coverage – requires a stronger mobilisation of private capital in order to scale up and remain competitive.

To go further: [ECSO Market Development activities](#)

CALL FOR COMPANIES ON THE CYBERHIVE MATRIX BETA VERSION

The next edition of the Matrix is taking place, and we are going to release it in October 2025! Get yourself ready to register and contact Guillermo Ferrer Hernáez, Manager for Cyberhive Europe, to discuss your interest in being part of the next edition : guillermo.ferrer@ecs-org.eu.