The Cyberhive EUROPE®

- **Project History**

The Cyberhive EUROPE® evolved from the ECSO market radar, an initiative to analyze Europe's cybersecurity market maturity by identifying its companies and their solution offerings.

- **Our mission**
  - ✓ A competitive European cybersecurity market with internationally recognized solutions and strong synergies among cybersecurity stakeholders.

- **Criteria to be included within the Cyberhive**
  - ✓ Headquartered in Europe
  - ✓ No major ownership/control from outside Europe
  - ✓ Compliance with European laws and regulations (e.g., GDPR)

Cybersecurity registered* vendors to Cyberhive [1]
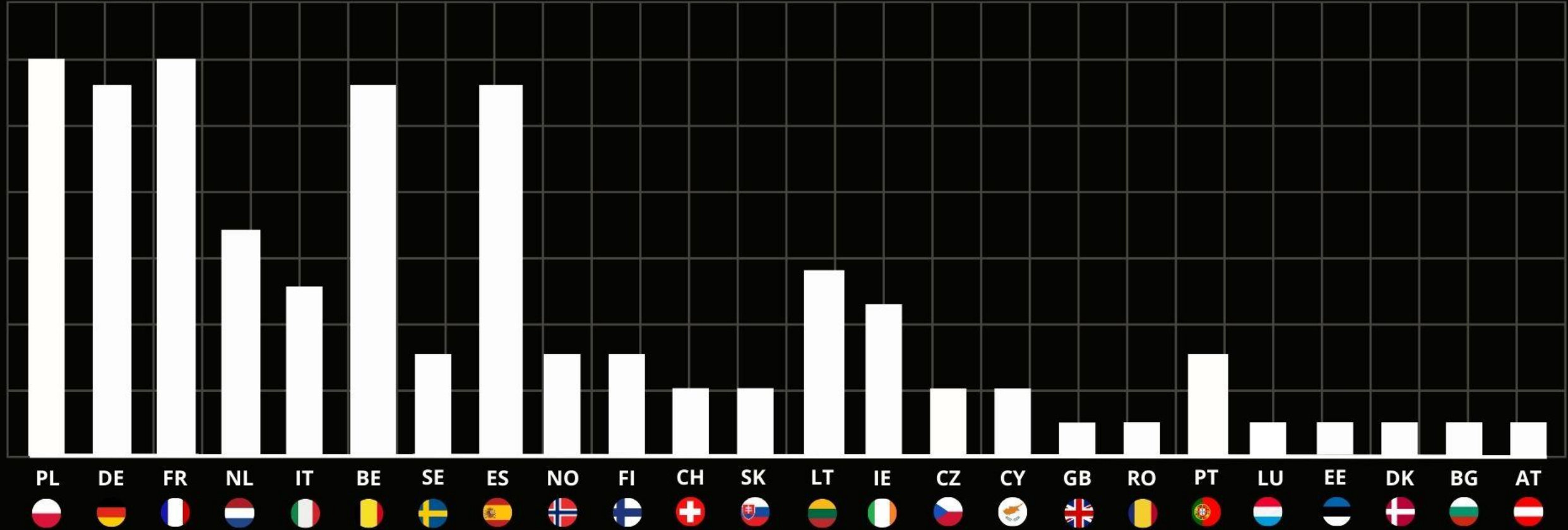
[1] From 01/05/25 Cyberhive EUROPE®, European Cyber Security Organisation 2025

Leading European vendor country

Non-leading European country

ECSO MATCHMAKING EVENTS 2025

ECSO
EUROPEAN CYBER SECURITY ORGANISATION

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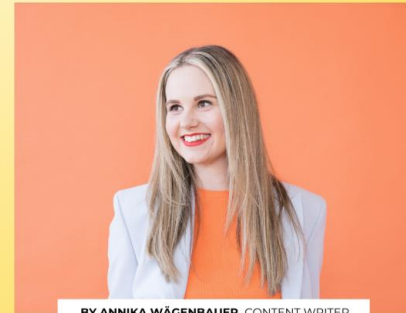

ECSO CYBERSECURITY MARKET PULSE

YOUR MONTHLY BRIEF ON EUROPEAN CYBERSECURITY MARKET NEWS

May 2025

ECSO   cyberhive®

The Power Play of AI in Cybersecurity: Fueling Innovation for Threat Actors and Defenders Alike

BY ANNIKA WÄGENBAUER   CONTENT WRITER

ARTICLE   TECH, WOMEN IN CYBER

Filters

Event status

○ - Any -
○ Upcoming events
○ Past events

Event type

☐ Online event
☐ Physical event
☐ Other

CYBERTECH EUROPE

October 8-9, 2024
La Nuvola Convention Center,
Rome, Italy

Cybertech Europe Italy

8 October 2025 09:05 – 9 October 2025 17:00

📍 La Nuvola Convention Center in Rome

Cybertech Europe 2025 will be held at the La Nuvola Convention Center in Rome. It will focus on the challenges and opportunities of our dynamic, multidimensional world.

The Cyberhive Matrix: The Concept

The Cyberhive Matrix™
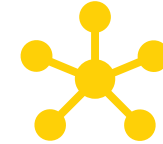
A simple tool that evaluates European cybersecurity solutions

- The evaluation revolves around the 1 criteria: **solution, European readiness**, and the **company**

The Cyberhive Matrix puts the spotlight on European solutions.

- Making the user experience and **European-tailored fit** of solutions central in the criteria.
- Focus on **SMEs**: no need for analysts or unnecessary calls or extensive surveys

Initiated by ECSO and strongly supported by the European industry.

- Done in a **trustworthy**, **replicable**, and **useful** way by catering the needs of different users
- Users are part of the development

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The Cyberhive Matrix™ Task Force

Participant	Role	Organisation
Patricia Shields	CEO & Co-Founder	Cyber Cert Labs
Regis Cazenave	General Manager Europe	S2 Grupo
Zuzana Legathova	Senior Manager of Analyst & Tester Relations	ESET
Ignacio Sbampato	CRO	Excalibur
Jörg Audörsch/ Paul Di Matteo	CEO & Founder	ESCRA/ Trudexia
Matthias Mühlert	Group CISO	Dr. August Oetker KG
Marc Vael	CISO	Veralto
Petri Kuivala	CISO Advisor	Hoxhunt
Simone Fortin	CISO	MSC Cruises
Andrzej Bartosiewicz	President	CISO Poland
Bart Houlleberghs	Partner	TIN Capital
Alejandro Wright	Associate	Axon Partners Group
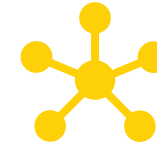
Vendors — rows: Patricia Shields through Jörg Audörsch/ Paul Di Matteo

End-users — rows: Matthias Mühlert through Andrzej Bartosiewicz

Investors — rows: Bart Houlleberghs and Alejandro Wright

Initiated by ECSO and strongly supported by the European industry.

- Done in a **trustworthy**, **replicable**, and **useful** way by catering the needs of different users
- **Users are part of the development**

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Entry criteria

1

2

3

Register to Cyberhive

- HQ in Europe (EU, UK, EEA, EFTA)
- GDPR compliant
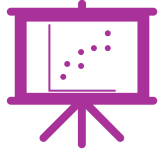- No major ownership outside Europe

Fill in the form

- Share company details for the Matrix report
- New openings coming for the Matrix H2 2025 edition

Upload your solutions on Cyberhive

- Promote your company and solution on Cyberhive
- Register here: https://www.thecyberhive.eu/register

!

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The setup

The Matrix report, include a **quadrant** showcasing solutions of a category in 1 clear graph. Evaluation criteria focus on the **needs of end-users of cybersecurity.**
- Solution category aligned with NIST CSF 2.0 (**might change**)
- 1 report half-year edition
- 24/7 available via Cyberhive

Report publication: freely accessible after the webinar. with the solution descriptions, vendors and summaries

- Shared among and outside the ECSO
- Report is freely accessible via Cyberhive
- Complete version is available for all registered end-users

The Cyberhive Matrix will be presented in a webinar at every single half-year editions
- Q1 included 4 solution categories, including NDR, MDR, XDR and SOC as a Service.
- **H2 2025 will include new solution categories that we would like to discuss with you!**

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The report

The report will publicly-shared:
- **1 public report every half-year**
  - Quadrants
  - Solution descriptions
  - Criteria and methodology

➤ Special vendor reports with detailed evaluations

- User satisfaction criteria
- Recognition Awards
- Company standards and certifications

Descriptions
Solution
• Solution description, pricing model, deployment documents
European readiness
• EU Compliance, auditor reports
• Company transparency
• Tech support, language availability

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The data

The report will publicly shared:
- **1 public report every half-year.**

   Including information collected via:

➤ Open-Source Data
➤ The Cyberhive data: reviews
➤ Surveys information and calls

The quadrant
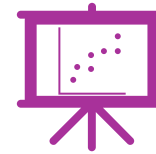
	Criteria	Data points
Solution (50%)	User satisfaction	4
	Future proof	6
European readiness (50%)	Compliance	Descriptive
	ESG	2
	European tailored	5

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The Cyberhive Matrix: Analysis of the Criteria and Methodology

User Experience and Solution Criteria

Criteria	Unit	Score	Weight
User Satisfaction			
Overall user satisfaction	Average overall Cyberhive rating*	Score [0 - 5]	30%
Average Net Promoter Score (NPS)	Solution's NPS*	Range [0 - 5]	30%
Ease of scalability	Avg. scalability score*	Score [1 – 5]	15%
Ease of deployment	Avg. deployment score*	Score [1 – 5]	15%
Deployment support	Included deployment docs (yes/no) Included supporting docs (yes/no)	Binary [0 or 5] Binary [0 or 5]	5% 5%

*Currently via open-source data gathering

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European readiness criteria

Criteria	Unit	Score	Weight
ESG			
Social	Gender balance	Range [0 - 5]	15%
Governance transparency	Availability of governance documents	Non-binary [0, 1, 2 or 5]	35%

Gender balance	Score
0%	1
13%	2
26%	3
36%	4
51%	5

Availability of company transparency:
1. Availability of webpage + linkedin [yes/no]
2. Transparency of Board of Directors [yes/no]
3. Transparency of ownership of the company [yes/no]

Documents available	Score
0	[0] Not one of the documents is publicly available via company resources
1	[1] 1 of the documents is publicly available via company resources
2	[2] 1 of the indicated document is missing via publicly available company resources
3	[5] All documents are publicly available

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European readiness criteria

Criteria	Unit	Score	Weight
European tailored			
European client tailored	Language availability European focused promotion	Range [0 – 5] [0, 3 or 5]	10% 10%
Operational Sovereignty	Data located in the European Region HQ Located in the European Region	Binary [0 – 5]	20% 10%

Language coverage	Score
0%	1
10%	2
20%	3
30%	4
60%	5

European representation	Score	
1		0[0] nothing
2		3[3] association/CSMiE
		[5] association + CSMiE label (or comparable solution)
3		5+ Cyberhive

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Paul Bayle Atos Group
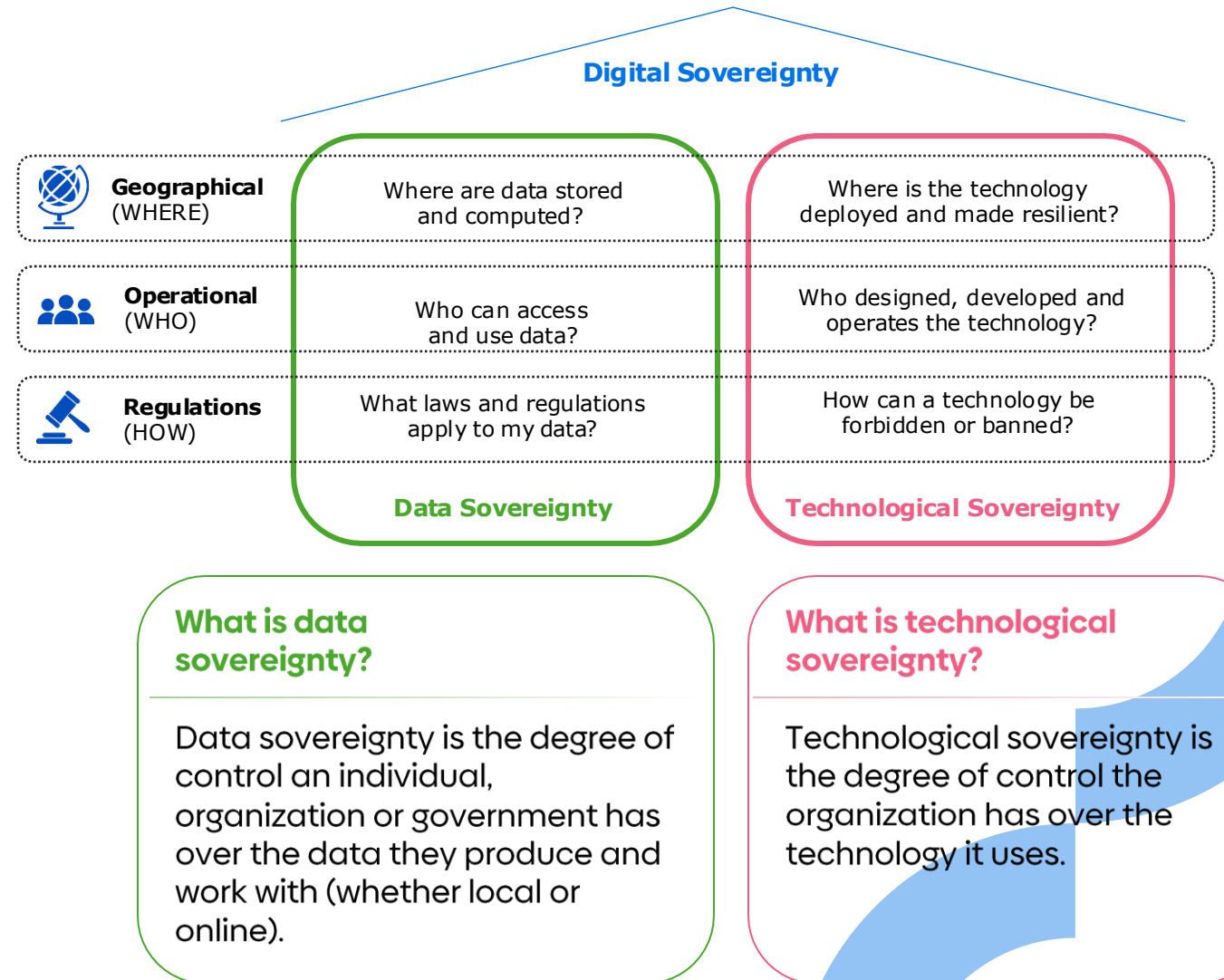
Digital Sovereignty: what is it and why is it so complex?
A multidimensional challenge
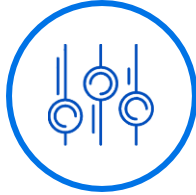
- **Data sovereignty** and **technological sovereignty** are the two pillars of **digital sovereignty**, which can be defined as *the degree of control an organization has over its digital environment (data, applications, software, systems and hardware).*

- The **complexity** of digital sovereignty increases depending on the organization's geographical, operational and regulatory context.

aligned with the World Economic Forum (WEF) [definition](#)

Digital Sovereignty

Geographical (WHERE)	Where are data stored and computed?	Where is the technology deployed and made resilient?
Operational (WHO)	Who can access and use data?	Who designed, developed and operates the technology?
Regulations (HOW)	What laws and regulations apply to my data?	How can a technology be forbidden or banned?

Data Sovereignty

Technological Sovereignty

What is data sovereignty?

Data sovereignty is the degree of control an individual, organization or government has over the data they produce and work with (whether local or online).

What is technological sovereignty?

Technological sovereignty is the degree of control the organization has over the technology it uses.

Facts & Figures

Traditional perimeter is inside out

- Organizations are moving to the cloud to improve agility and scalability. Most data is processed and stored across geographical borders. Data is often using foreign technologies (mostly US-owned) therefore more dependent and subject to foreign interest and priorities
- Workforce out of the office perimeter (exacerbated by the Covid-19 situation)
- Loss of control on the Internal perimeter : BYOD, partners, wireless, IoT, OT
- Increased usage of GenAI SaaS applications is raising data leakage risk

Laws to exercise authority over data are changing the game

- Extraterritorial laws (e.g., CLOUD Act) strengthen power of some countries and facilitate their access to data stored across borders
- Constant back and forth between new EU-US adequacy decisions and their EUJC invalidation complexifies GDPR compliance perennity for EU customers*

Geopolitical tensions are exposing technological dependencies and risks

- European customers were impacted by US tech incidents affecting service availability
- US export controls to prevent companies from shipping advanced processors and chipmaking equipment to China.
- Vulnerabilities and threats can come from anywhere, including vendors
  - US banned Kaspersky antivirus software
  - US banned communications equipment from five Chinese companies, including Huawei and ZTE

* 07/2000 Safe Harbor > 10/2015 Schrems I > 07/2016 Privacy Shield > 07/2020 Schrems II > 07/2023 Data Privacy Framework

4% of employees paste sensitive data into GenAI on a weekly basis, says a research from LayerX

68% of the public cloud market is owned by Amazon, Google, and Microsoft. says the Synergy Research Group (2024)

82% of the world's population is now (2025) under the protection of some form of national data privacy legislation

3

What drives sovereignty needs?

Legal and regulatory compliance

- ○ GDPR and other privacy laws
- ○ NIS Directive and national security laws
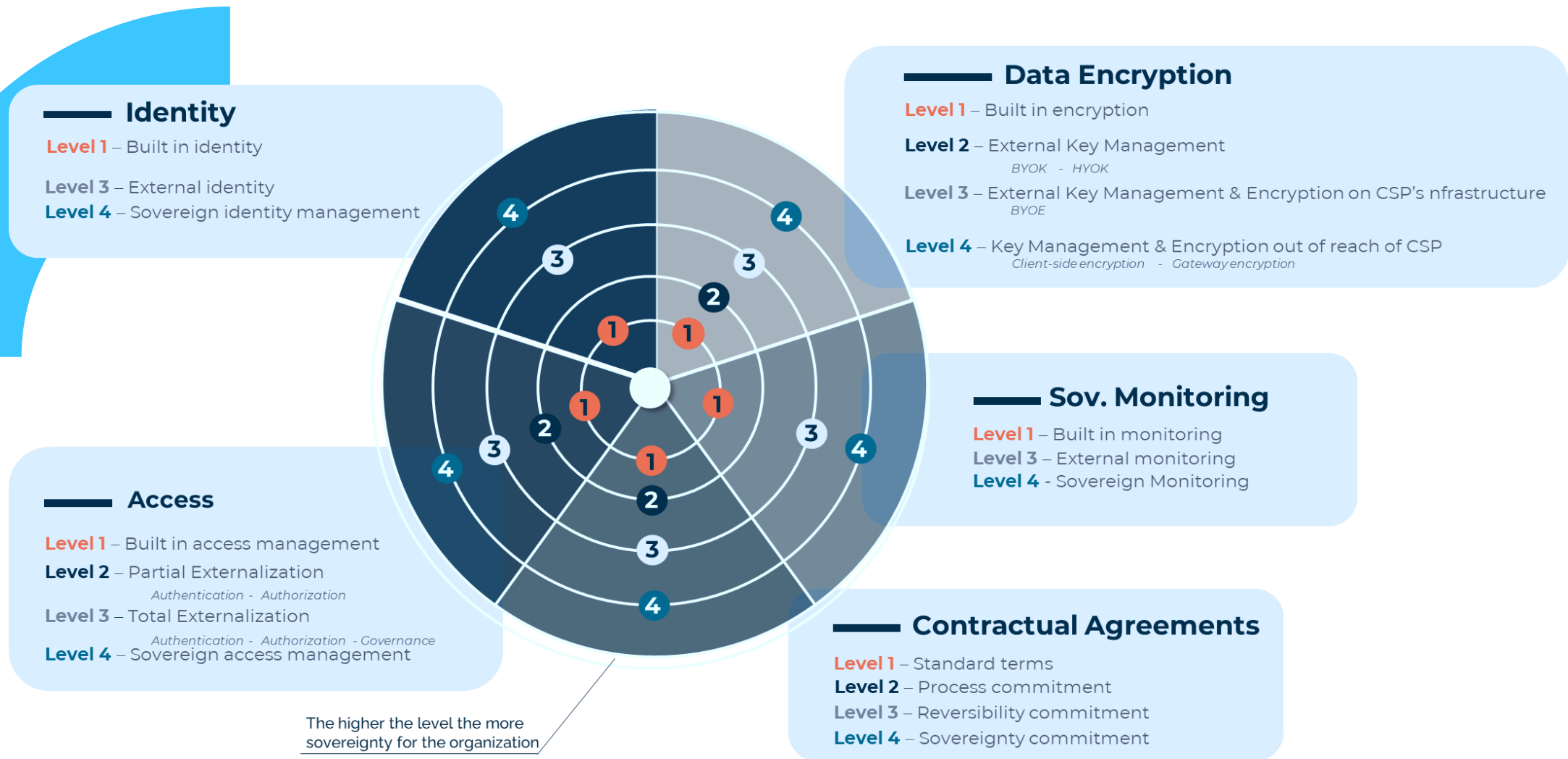- ○ Industry led regulations
- ○ New key regulations

Protection of strategic digital assets

- ○ Industrial secrets
- ○ R&D
- ○ Innovations
- ○ Patents
- ○ Customer/commercial data

More data is being produced, it's critical to **control** it at every step and in any location, regardless of the geopolitical context.

Atos sovereignty controls main toolbox

Controls must match sovereignty level needs

Identity

Level 1 – Built in identity

Level 3 – External identity
Level 4 – Sovereign identity management

Data Encryption

Level 1 – Built in encryption

Level 2 – External Key Management
  BYOK   -   HYOK

Level 3 – External Key Management & Encryption on CSP's nfrastructure
  BYOE

Level 4 – Key Management & Encryption out of reach of CSP
  Client-side encryption   -   Gateway encryption

Sov. Monitoring

Level 1 – Built in monitoring
Level 3 – External monitoring
Level 4 - Sovereign Monitoring

Access

Level 1 – Built in access management
Level 2 – Partial Externalization
  Authentication - Authorization
Level 3 – Total Externalization
  Authentication - Authorization - Governance
Level 4 – Sovereign access management

Contractual Agreements

Level 1 – Standard terms
Level 2 – Process commitment
Level 3 – Reversibility commitment
Level 4 – Sovereignty commitment

The higher the level the more sovereignty for the organization

5

Atos sovereignty controls main toolbox

Own assets to create sovereign foundations

Identity is the new perimeter	Controlling access is critical	Encrypting everything sensitive is a must	Sovereign Managed Detection and Response
IDnomic cryptovision	Evidian	Trustway	Alsaac

Thank you

Atos

Pawel Rybczyk Labyrinth

LABYRINTH

Pawel RYBCZYK, CEO

LABYRINTH SECURITY SOLUTIONS

pawel.rybczyk@labyrinth.tech

OUR VISION is

to shift the balance of power in favour of defenders

What is the goal of the attacker?

- Labyrinth Security Solutions sp. z o.o. (LLC)
- Founded 2019, HQ Poland
- The Team – 16 experts – Germany / Poland / Ukraine
- Cyberhive member since 11/2023

- **protect** critical infrastructure, data, and essential services from sophisticated cyberattacks

- ensuring the **resilience** of European society and economy

- **reduce dependence** on non-European technologies

- NETWORK MONITORING and INTRUSION DETECTION based on the CYBER DECEPTION STRATEGY

- EASY TO DEPLOY

- EASY TO USE

- EASY TO MAINTAIN

- PREMIUM PRODUCT with PREMIUM SUPPORT

- DELIVERY via CHANNEL PARTNERS (1-TIER / 2-TIER)

SO WHAT?

- Cyberhive – November 2023

- ECSO's CISO Choice Award nomination (Barcelona 2024)

- ECSO's Days 2024 (Brussels 2024)

- ECSO's Annual CISO Meetup 2024 (Vienna 2024)

- Cyberhive Matrix Q1 2025 (February /2025)

- **LABYRINTH TAKES #1 CISO Choice Award!** (Hague May/2025)

- ECSO's VILLAGE at CYBERSEC FORUM C EXPO (Krakow June /2025)

- ECSO's Days 2025 (Brussels June /2025)

- ECSO's CISO Meetup 2025 (Valencia September /2025)

THANK YOU

The Cyberhive Matrix Results Q1 2025 Edition

The first Matrix participants

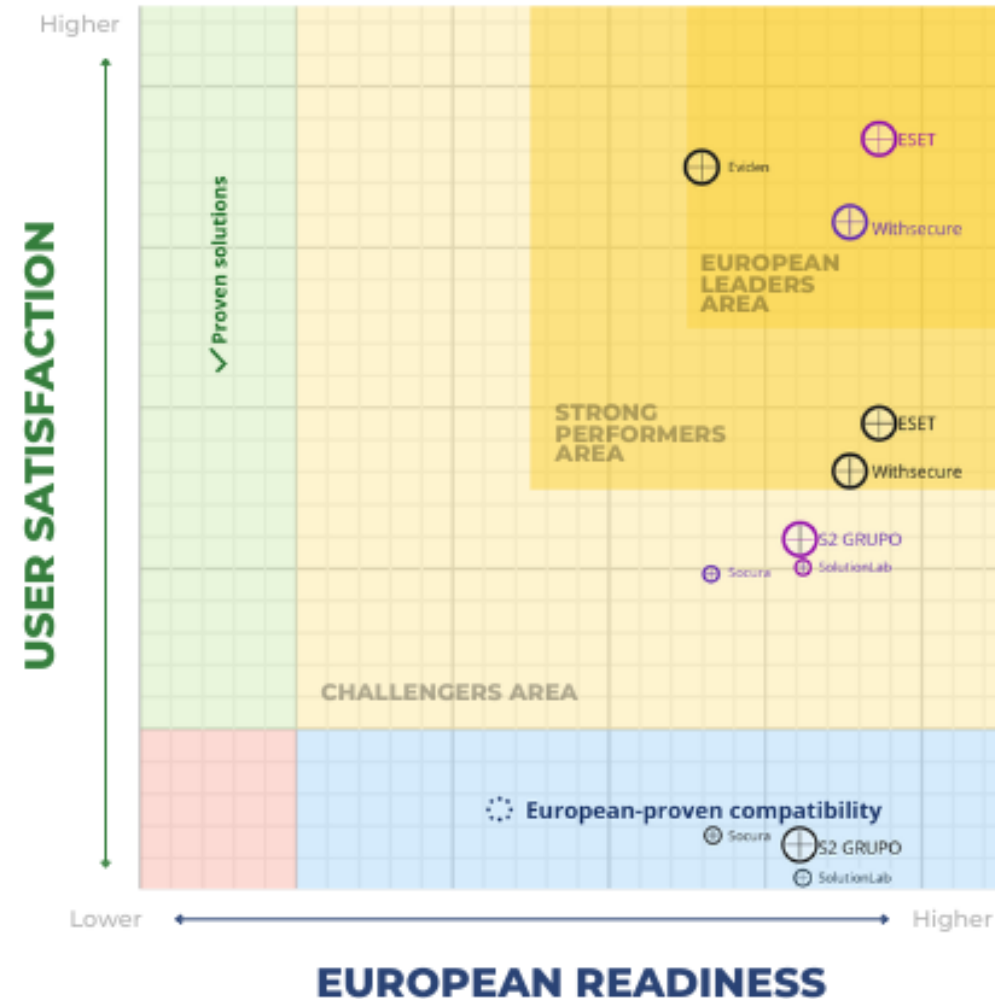| Network Detection and response (NDR)	Managed detection and response (MDR)	Extended Detection and Response (XDR)	Security Operation Center (SOC) as a Service
LABYRINTH	EVIDEN	sekoia	NRD Cyber Security
cryptomage®	SolutionLab	eset	SAMA PARTNERS THE SECURITY INTELLIGENCE COMPANY
	W/TH secure	W/TH secure	

Professional Cyberhive member

Other solutions   AIT AUSTRIAN INSTITUTE OF TECHNOLOGY
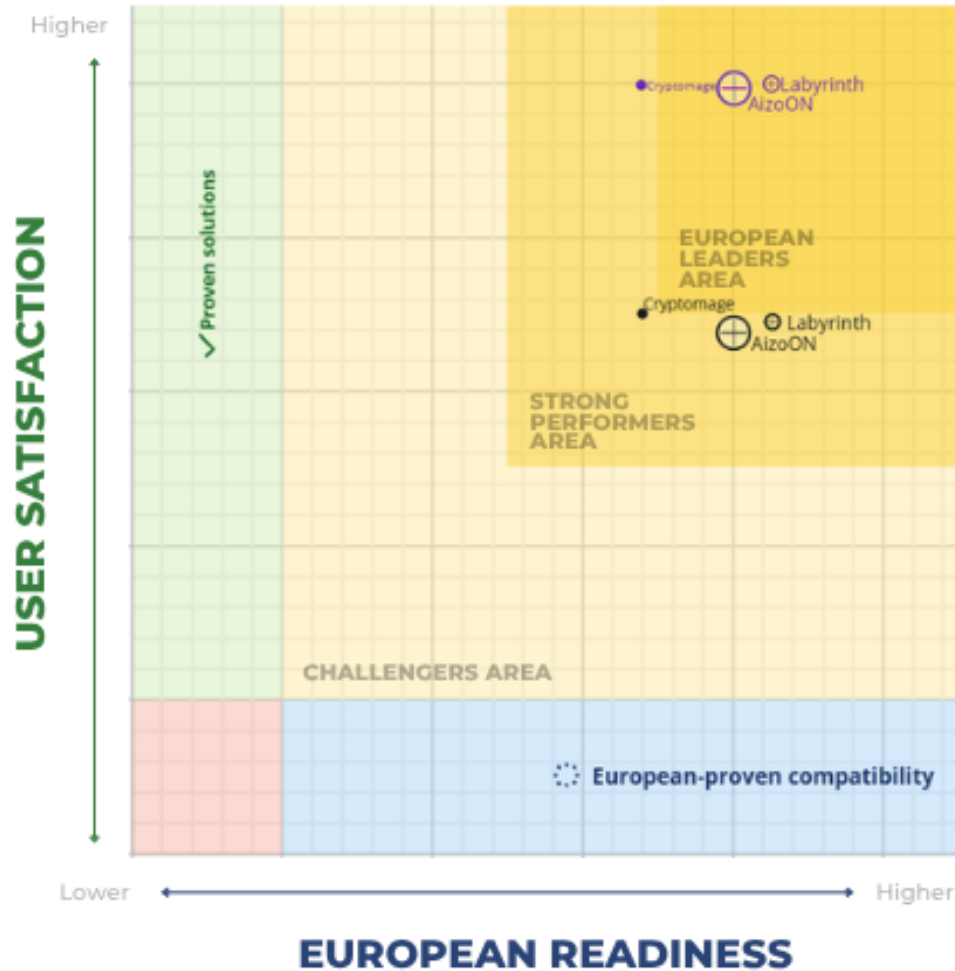
Quadrant Managed Detection and Response

Quadrant Network Detection and Response

EVALUATED VENDORS

aizoon®

cryptomage®

LABYRINTH
Better protection. Less complexity. More confidence.

STRONG PERFORMER
cyberhive® MATRIX Q1 2025

Descriptive part

ESET Protect MDR
By ESET

Solution All-in-one protection with 24/7 MDR service Superior AI-native protection with continuous threat hunting and monitoring. Access world-leading ESET expertise and threat intelligence via managed detection & response, delivered as a 24/7 service.The service combines the skills of ESET's world-class IT security research teams and incident responders, and the cutting-edge technology of ESET's IT security products. Its responsive, tailored support reduces the risk of any interruption in operational continuity. o Guaranteed response times o XDR deployment and optimization o Suspicious behavior investigation o Digital forensics o Proactive threat hunting and threat monitoring.

Cyberhive Page 🔗

Distinctions

	Professional Cyberhive Member
	✕ CYBERSECURITY MADE IN EUROPE™
ECSO	OFFICIAL MEMBER

User Experience

Average rating	4.6
Ease of scalability	O(5)[1]
Ease of Deployment	O(5[1]
Peer	

WithSecure Countercept
By WithSecure

Solution

Deployment support	Cloud, SaaS, web-based.
Supported platforms	All web browsers supporting OSs, Desktop Mac, Desktop Windows, Desktop Linux, Server Linux, Server Windows, Identities: Microsoft Entra ID, Cloud platforms: Microsoft Azure, Amazon Web Services.
Pricing Transparency	The price depends on number of devices and modules adopted.
Total Cost of Ownership (TCO) justification	An an independent 3rd party review by AV-Comparatives states that WithSecure delivers a low TCO combined with exceptional technical capabilities and reasonable costs.
Pricing Model	Subscription (monthly/yearly), custom pricing.

European readiness

Gender balance	25% female, 75% male.		
Supported languages	Chinese, Croatian, Czech, Danish, Dutch, English, Estonian, Finnish, French, German, Greek, Hungarian, Italian, Norwegian, Polish, Portuguese, Romanian, Spanish, Swedish (76,7% EU coverage)		
Solution standards & certifications	ISO/IEC 27001 Information Security Management Systems – Requirements, ISAE 3402 Type II, CREST Simulated Targeted Attack and Response (STAR), CREST Intelligence Led Penetration Testing (STAR), CREST Cyber Security Incident Response (CSIR), CREST Penetration Testing (PEN TEST), NCSC UK Cyber Incident Response (CIR) Level 2, NCSC Germany Cyber Incident Response (CIR), CREST TIBER EU (Europe), ISA/IEC 62433 (Security for Industrial Automation and Control Systems)		
Proof of a third party audit report (max. 2 years old) available?	Yes, upon request.	Privacy Policy compliant with EU GDPR	Yes

Comparison tables

MDR Scoring Tables

User Experience

Criteria	Overall user satisfcation		Average ease of scalability	Average ease of deploy-ment	Deployment support		Final
	Average overall rating	Average NPS			Included deployment docs.	Included support. docs.	
ESET	4,6	3,5	0	0	5	5	2,93
Eviden	4,5	5	5	5	5	0	4,6
S2 Grupo	0	0	0	0	5	5	0,5
Socura	0	0	0	0	5	5	0,5
SolutionLab	0	0	0	0	0	0	0
WithSecure	4,5	3,5	0	0	5	0	2,65

European readiness

Criteria	Gender balance	Govern. transpa-rency	Language availability	Promotion of EU (-fit) solution	Operational Sovereignty		Final
					Data in EU?	HQ in EU?	
ESET	3	5	5	5	5	5	4,7
Eviden	4	2	4	5	5	5	3,7
S2 Grupo	2	5	2	3	5	5	4,05
Socura	2	5	2	0	5	5	3,75
SolutionLab	2	5	3	3	5	5	4,15
WithSecure	2	5	5	5	5	5	4,55

cyberhive
Powered by ECSO

Solutions   Vendors   Investors   Community ▾   About ▾   Matrix™ ▾

My account   Log out

cyberhive®
MATRIX

What is the Matrix?

The Cyberhive Matrix is a simple overview supporting end-users and investors when exploring European cybersecurity solutions. The Matrix is based on Cyberhive and open source data, focusing on maturity and European readiness of the solutions during the assessment. **ECSO,** owner and initiator of Cyberhive, is the independent entity that analyses and evaluates solutions. The first edition of the Matrix was released on February 2025.
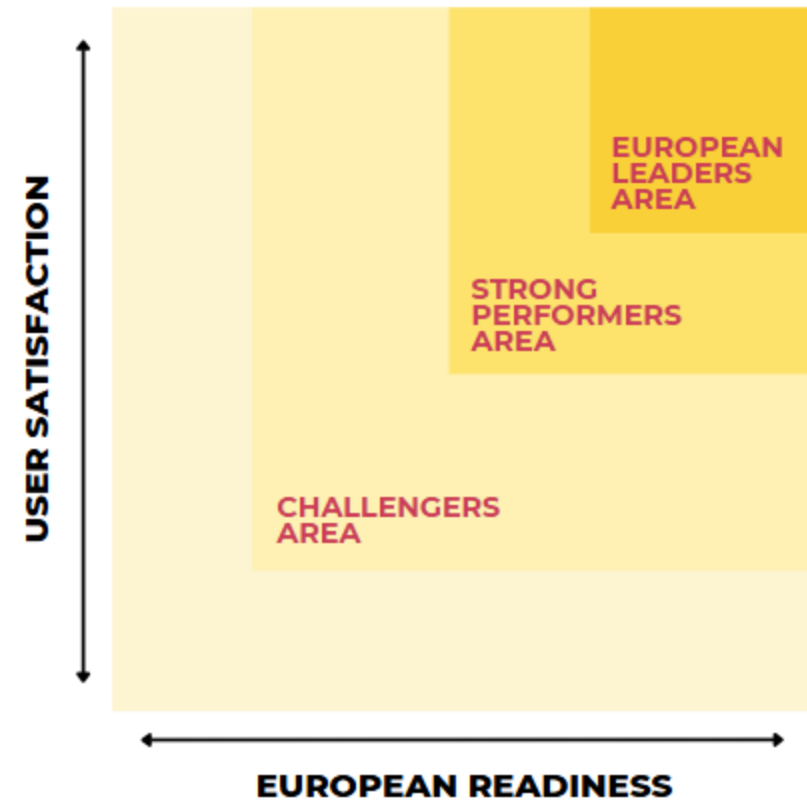
Shaping the Future: Your Vision for the Next Cyberhive Matrix

New changes

- **Other Innovative Solutions**: emerging technologies
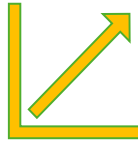- **Women4Cyber Entrepreneurship Awards and the Women Recognition Awards criteria in our qualitative data**

Next steps for the 2nd Edition of the Matrix 2025

The next Matrix participants

Increase user growth via ECSO's community and your engagement!

- Involvement of the CISO Community with the next category of solutions!

Improve engagement with participants

- Understanding changing needs of the end-users and vendors
- Activate users to review solutions
- Join the Task Force

Key Research Topics

Govern   Identify **(IAM)**   Protect   Detect **(Q1)**   Respond   Recover

Continuous Monitoring

NDR   MDR   XDR   SOC as a Service

Timeline for the H2 Cyberhive Matrix 2025

Step	Kick-off & Planning	Data collection	Assessment & feedback	Last revision	Publication & distribution
Goal	Define scope and criteria	Collect criteria data: Cyberhive, surveys, open source (calls)	Map scoring and vendor feedback	Draft is shared and revised before publication	Open webinar is held, public reports shared on Cyberhive, scoring report shared with vendors
User involvement	Invite vendors to join Cyberhive/ Update profile	Collect data and incentivise end-user feedback	Vendors provide feedback/more info	Vendors are informed, last revisions are made by ECSO and final consent is gathered	Sharing of stories and social media publications
Month	**June**	**July-June**	**July-August**	**September-October**	**End of October**

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How to participate for the next edition H2 2025?

Vendors

Available for all Cyberhive members! The next Matrix H2 2025 will be published in October.

Participate by:

- Registration to Cyberhive (basic or professional membership)
  - HQ in Europe (EU, UK, EEA, EFTA), 50% > FTE in Europe, GDPR compliant, No major ownership outside Europe
- Filling in the survey – that you can find on the right
- Promoting your solution in a category that will be covered in the Matrix

End-users

- Free to use The Cyberhive EUROPE

- Register to The Cyberhive EUROPE for more info

- Complete Report in the Cyberhive

- Join the Task Force by contacting Guillermo Ferrer Hernáez: guillermo.ferrer@ecs-org.eu

- Leave reviews and rate solutions on Cyberhive

The Cyberhive Matrix™ 2025
Second Edition

Thank you!
Contact: Manager of the
Cyberhive guillermo.ferrer@ecs-org.eu