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Les PME du cyberespace un élan vers le succès

Comment dynamiser la création des startups en France dans le domaine de la cyber sécurité et donner leur élan vers le succès à toutes ces pépites récentes et créer une licorne française dans la cyber



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PLAN

- **État de la situation**
- **Les fonds d'investissement CYBER**
- **Les modèles américains, anglais, israéliens**
- **La situation en France**
- **Les éléments clés de succès**



ETAT DE LA SITUATION

Classement des sociétés les plus innovantes en Cyber

La situation en France, mais aussi en Allemagne n'est pas brillante

Mon expérience de RSSI d'un grand groupe: en 5 années je n'ai quasiment pas acheté de produits « français »

Cybersecurity 500 List, 2018 Edition



Meet the world's hottest and most innovative cybersecurity companies to watch in 2018. [Press Release](#)

[Cybersecurity 500 By The Numbers: Breakdown By Region](#)

Showing 1-100 of 500

100 per page ▾

Page 1 ▾

of 5



◆ #	Company	Cybersecurity Sector	Corporate HQ
1	Herjavec Group	Information Security Services	Toronto, Canada
2	KnowBe4	Security Awareness Training	Clearwater FL
3	CyberArk	Privileged Access Security	Petach-Tikva, Israel

Cybersecurity 500 by Region

Drilling down into smaller regions and U.S. metro areas, we take a composite view of where the Cybersecurity 500 companies are located:

- Silicon Valley claims the top spot with 126 companies, 31 one of them in San Francisco – making it the top city on the list. Mountain View, next after SF in the Bay Area, boasts 18 companies.
- Northeast U.S., taken as a whole combining New England, NY, and NJ, has a total of 72 companies. New England itself tallies 31 companies on the list, with 10 of them in Boston. New York, with an expanding cybersecurity economy, lists 30 companies, including 21 in Manhattan. Connecticut jumped up to 6 companies on the list this year. New Jersey has 5 companies listed.
- Europe has 67 companies altogether, with 23 of them from the United Kingdom. France and Sweden have 7 companies apiece, Germany and Switzerland both have 6, and Ireland has 5.
- DC Metro (VA/MD/DC) totals 49 companies on the list – with 29 in Virginia and 12 in Maryland.
- Israel, the world's No. 2 exporter of cybersecurity technology, has 42 companies listed.
- Rocky Mountain U.S. has 26 companies listed, and 12 of them in Colorado. Right behind is Utah with 8 companies, and Arizona with 6.
- Southern California has 19 companies, with 5 of them in San Diego.
- Asia-Pac has a total of 19 companies, with 6 of them in China.



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ETAT DE LA SITUATION

350 US, 142 non US

France:7, Allemagne:6, (AIRBUS, THALES, SHIFT TECH, SENTRYO,
WALLIX, INSIDE SECURE, LEDGER)

UK:23, IR:5, SUEDE: 7

ISR: 42

USA: 29 Virginie, 12 Maryland

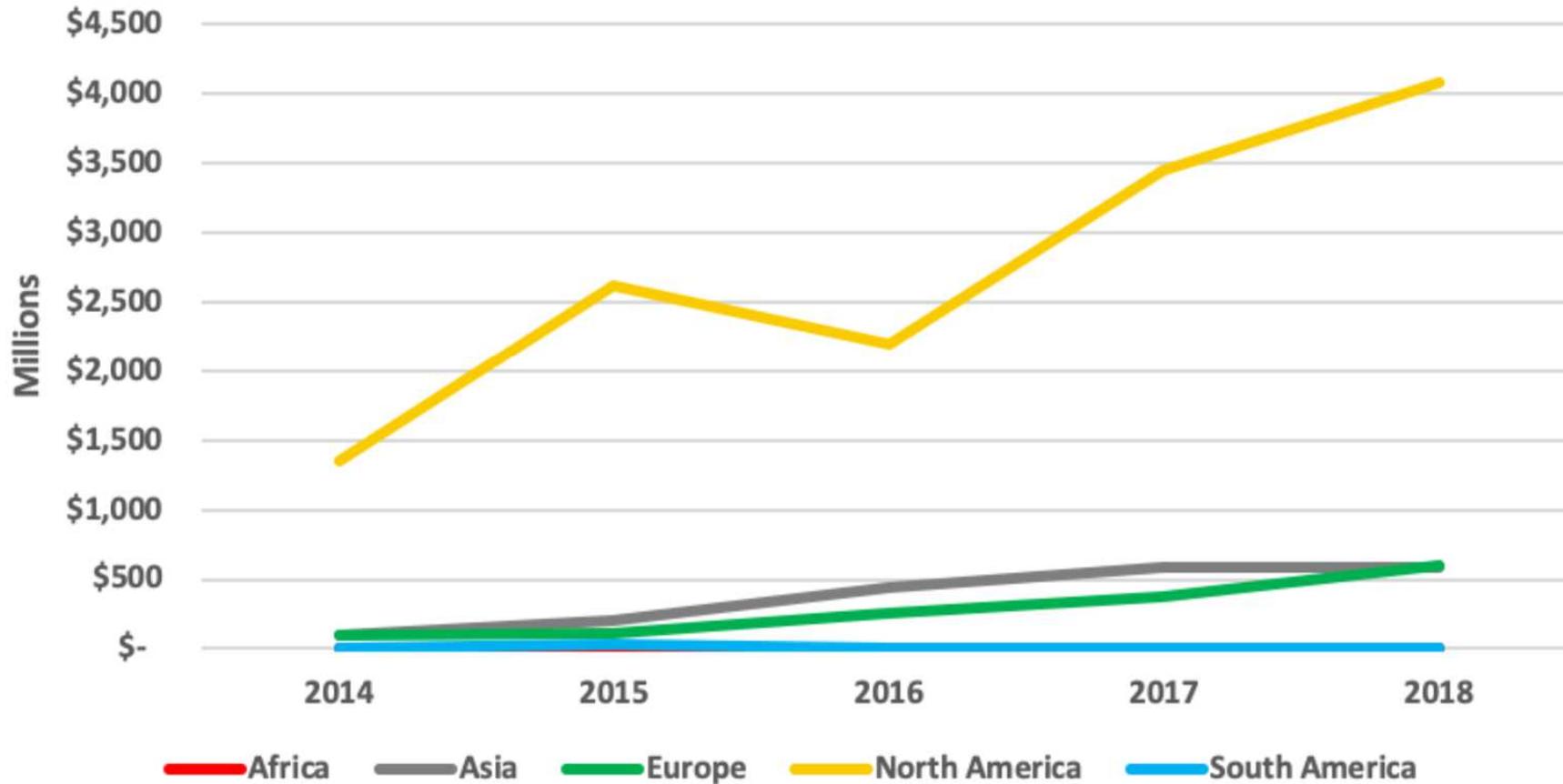
Pourquoi cette situation, est ce un problème de modèle d'organisation des états?
USA, UK, ISR, SUEDE ont une agence technique unique ??

Est-ce un problème de fonds d'investissements ?



LES FONDS D'INVESTISSEMENT CYBER

Cybersecurity VC Investment by Region





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LES FONDS D'INVESTISSEMENT CYBER USA

2014	2015	2016	2017	2018
None	Lookout (US) - \$200M	Stackpath (US) - \$180M	Rubrik (US) - \$180M	Anchorfree (US) - \$295M
	Cloudflare (US) - \$180M	QingCloud (China) - \$100M	QingCloud (China) - \$160M	Tanium (US) - \$200M
	Tanium (US) - \$147M	Cylance (US) - \$100M	BlueVoyant (US) - \$125M	CrowdStrike (US) - \$200M
	Vigilant Solutions (US) - \$110M		Illumio (US) - \$125M	Tanium (US) - \$175M
	Crowdstrike (US) - \$100M		Cybereason (US) - \$100M	Netskope (US) - \$168M
	Illumio (US) - \$100M		Netskope (US) - \$100M	Cylance (US) - \$150M
			CrowdStrike (US) - \$100M	Venafi (US) - \$100M
				Sygnifyd (US) - \$100M



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LES FONDS D'INVESTISSEMENT CYBER

PALADIN
CAPITAL GROUP

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Paladin is a leading global investor that supports and grows the world's most innovative cyber companies.

[Learn More](#)

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MANAGEMENT



Michael Steed
Founder and Managing Partner



Mark Maloney
Co-Founder and Managing Director



L.L. Gen. (Ret) Kenneth A. Minihan
Managing Director



Paul Conley, PhD
Managing Director



Christopher Steed
Managing Director



Chris Inglis
Global Security Expert and Managing Director



Richard Ledgett
Global Security Expert and Managing Director

Ex-NSA chief's startup raises \$78 million, helps defend U.S. power grid

Dustin Volz

3 MIN READ



WASHINGTON (Reuters) - IronNet Cybersecurity Inc, a startup led by former U.S. National Security Agency chief Keith Alexander, has raised \$78 million in additional funding, the company told Reuters on Wednesday, a day ahead of a planned announcement.

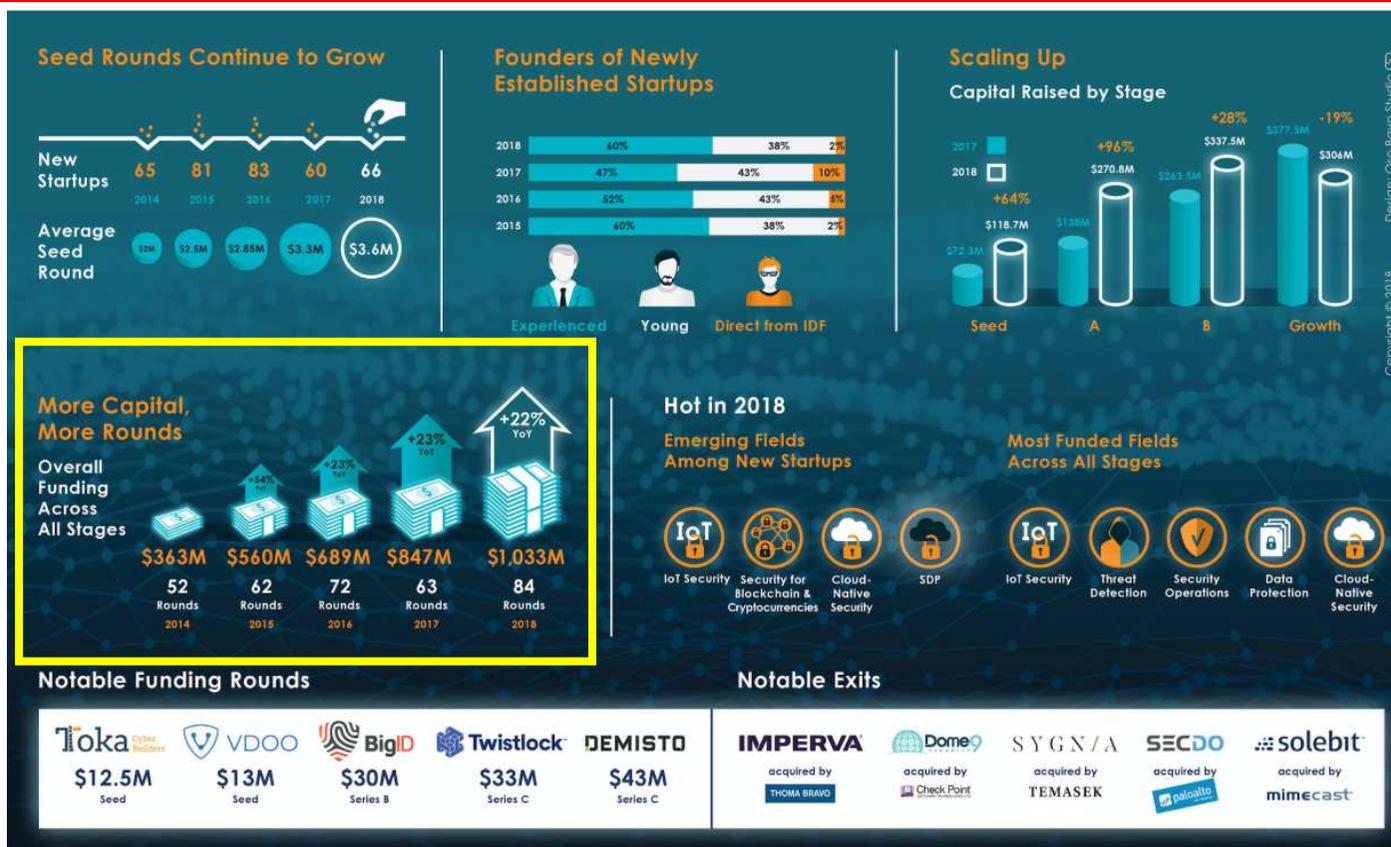


Keith Alexander, president and CEO of IronNet Cybersecurity and former Director of the National Security Agency, speaks during the TechCrunch Disrupt event in New York City, U.S., May 16, 2017. REUTERS/Brendan McDermid



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LES FONDS D'INVESTISSEMENT CYBER ISRAEL



Design: Orio Bayo-Studio CD
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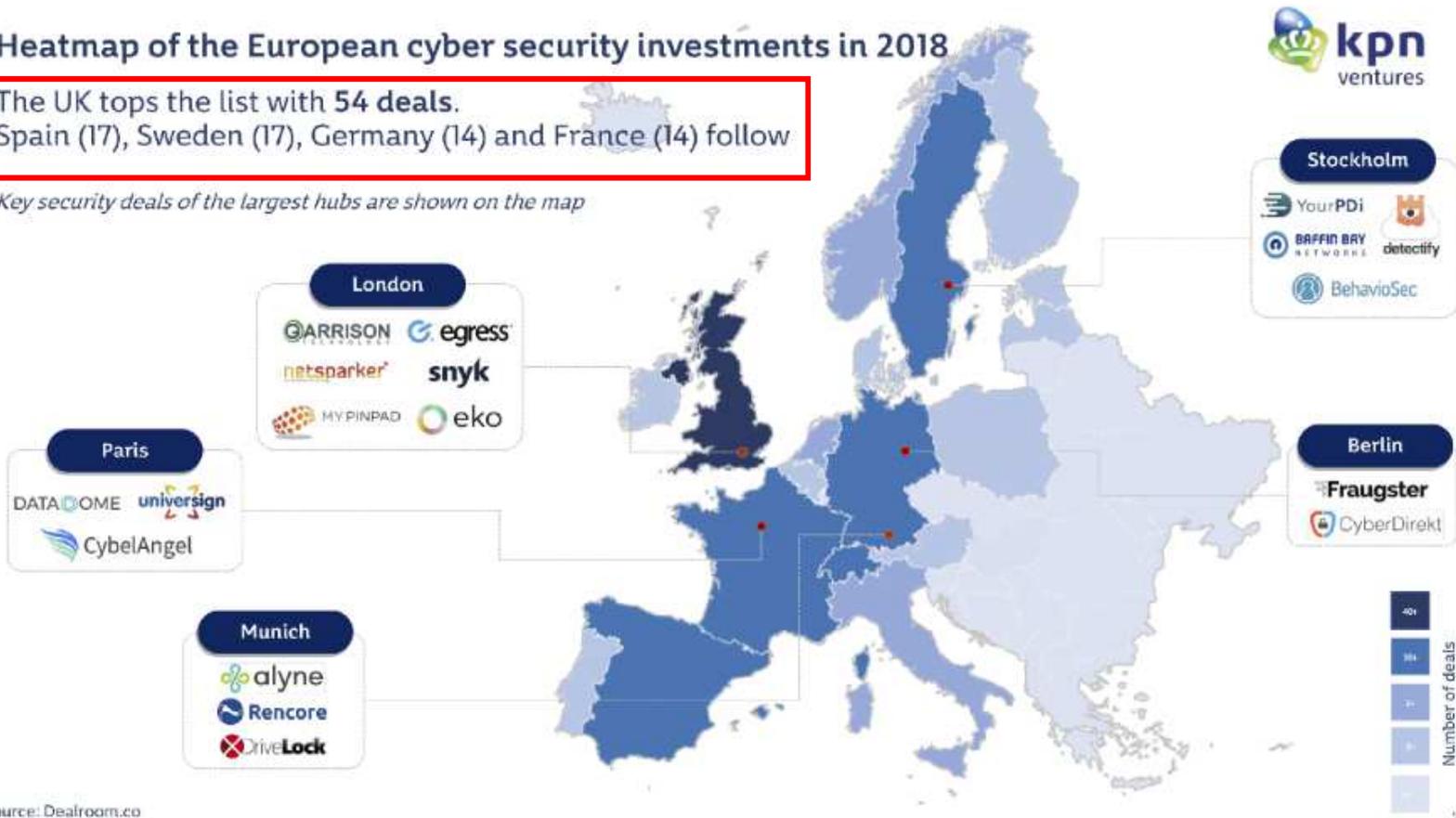


2018 LES INVESTISSEMENTS CYBER EN EUROPE

Heatmap of the European cyber security investments in 2018

The UK tops the list with 54 deals.
Spain (17), Sweden (17), Germany (14) and France (14) follow

Key security deals of the largest hubs are shown on the map



Source: Dealroom.co



LES FONDS D'INVESTISSEMENT CYBER EN FRANCE

OUR FUNDS

Les fonds français, encore trop peu actifs dans le cyber

Le cabinet Preqin ne recense aucun fonds français ayant levé des capitaux destiné à investir directement dans la cybersécurité en 2018. En Israël, plus de 600 millions de dollars ont été mobilisés et 8,2 milliards aux Etats-Unis.

are market leaders in their industry, with an emphasis on worker-friendly transactions.



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LES MODELES ANGLO SAXONS ET ISRAEL

LES MODELES REPOSENT SUR UN QUADRIPTYQUE

Une agence technique unique avec trois fonctions

- développe et ou achète la technologie
- forme les experts (8200, 3000 appelés sur 3 à 5 ans)
- exporte les experts(8200, 200 à 300 experts par an)

Un incubateur-accélérateur, proche de l'agence technique qui lui fournit les experts-coach, proche des universités qui apportent l'innovation de rupture et proche des utilisateurs-acheteurs

Des fonds d'investissement

Un réseau universitaire d'excellence Cyber



LES MODELES ANGLO SAXONS ET ISRAEL

Team8 builds companies

developing transformative technologies, rooted in cybersecurity and data science, that drive enterprises forward



Our Model

We bring together innovators, Strategic Partners, Investors, Entrepreneurs, Experts, Customers and Talent to build new, disruptive companies that help businesses thrive.

Our model is based on three core pillars:



Talent

We bring top cyber and data talent from industry and from elite cyber and intelligence units of the Israel Defense Force with strong experience in building cyber resilience and mission-critical data science.



Company-Building Methodology

We apply our proven methodology to turn great ideas into great companies, starting with identifying the problem, validating the solution fit in the market and fueling the growth to scale.



Village

Our strategic investors and extended village of researchers, partners and customers, provide invaluable insights, deep understanding of the challenges and access to the decision-makers that ensure our companies establish the right upward trajectory.



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LES MODELES ANGLO SAXONS ET ISRAEL

Leadership Team

Team8's leadership represents decades of experience into the cybersecurity threats we face and have unparalleled access to exceptional talent capable of building resilience in complex environments.



Yuval Shachar

Executive Chairman



Nadav Zafrir

Co-Founder, Chief Executive Officer



Liran Grinberg

Co-Founder, Chief Marketing and Business Development Officer



Israel Grimberg

Co-Founder, Chief Innovation Officer



Assaf Mischari

Head of Research



Lluís Pedragosa

Chief Financial Officer



Dr. Eldad Rom

VP of Organizational Development

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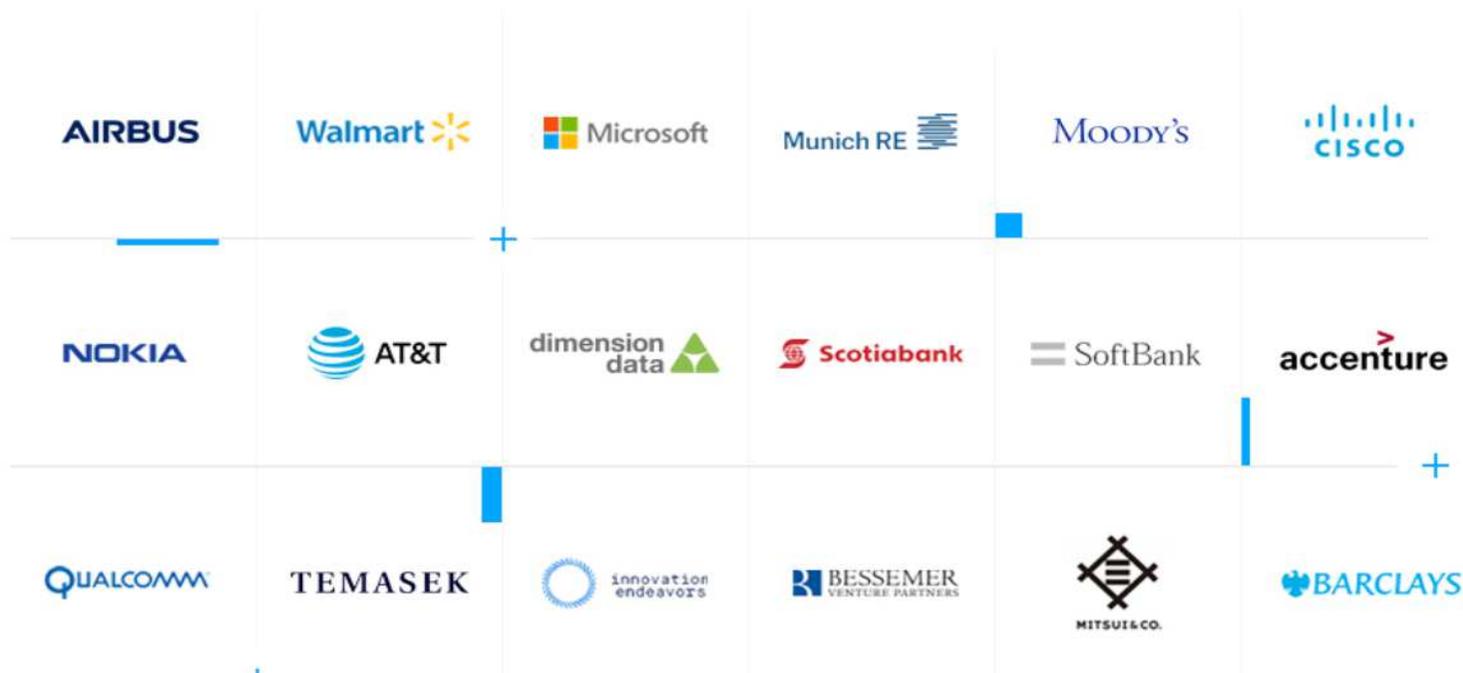


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LES MODELES ANGLO SAXONS ET ISRAEL

Cross-Industry Global Coalition

Our strategic investors are integral to the company-building process. They are the brain-trust whom we call upon at every step to provide insights, guidance and validation. As shared owners in our companies, they are deeply invested in ensuring on the best ideas, technologies and companies are created.



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LES MODELES ANGLO SAXONS ET ISRAEL: TEAM8

CLAROTY
Clarity For Your OT Networks

**Former Director of NSA
and Commander of U.S.
Cyber Command Joins
Claroty**

READ MORE



LES MODELES ANGLO SAXONS ET ISRAEL: LES INCUBATEURS (13 incubateurs spécifiques aux USA)

U.S. Cybersecurity Incubators

- **1776**, Washington, D.C. The recent merger of incubator 1776 with coworking space chain Benjamin's Desk resulted in campuses in Washington, D.C.; Wilmington, Del.; Philadelphia, Pa.; and New York City, N.Y. The campuses offer mobile spaces, private offices, conference rooms, state-of-the-art laboratories, and event areas. 1776 also has a campus in Dubai.
- **ACI@NSU**, Davie, Fla. This incubator is a partnership between Abanacle and Nova Southeastern University. Located on the NSU campus, the program aids startup companies and works on advanced projects and research in cybersecurity. Startups have different office space choices, including private offices and an open-floor plan.
- **Baker Donelson Cybersecurity Accelerator**, Atlanta, Ga. BDCA offers startups dedicated mentors and office space in the Cybersecurity Accelerator Center for one low monthly fee, as well as networking opportunities through its annual Cybercon event.
- **Build Sec Foundry**, San Antonio, Texas. An incubator launching and scaling early-stage security product startups. Located inside Geekdom – the place where startups are born – in the heart of San Antonio's growing downtown tech district.
- **Cyber Incubator@bwtech**, Baltimore, Md. This incubation program offers business and technical support to startup and early-stage cybersecurity/IT products and services companies. It provides office space on a dedicated, shared, or drop-in basis. Strategic partnership with Northrop Grumman Corp. and certified federal HUBZONE location.
- **Cyber NYC**, New York, N.Y. New York City Economic Development Corporation (NYCEDC) is launching Cyber NYC, including a Cyber Center that will create a physical space that serves as the primary hub for NYC's cyber community. The Center's Community Programs will foster collaborations between industry, academia, and startups, and the Accelerator will be NYC's first accelerator dedicated to scaling cyber-related startups.
- **DataTribe**, Fulton, Md. Founded by members of the Intelligence Community and National Labs, DataTribe offers startups early-stage capital as well as free office space and discounts on IT services.
- **EvoNexus**, San Diego and Irvine, Calif. This incubator offers office and lab space in two locations as well as mentorship programs. The 18,000-square-foot office in San Diego features an open and collaborative workspace. Irvine's 10,000-foot floor plan is an open concept.
- **Georgia Cyber Center**, Augusta, Ga. The \$100 million center is the largest investment in a cybersecurity facility by a state government to date. The unique public/private partnership involves academia, state and federal government, law enforcement, the U.S. Army, and the private sector.
- **NYU Tandon Future Labs Next Round**, New York, N.Y. This program offers incubation for up to 2 years. For the first 6 months, up to two founders receive free desk space at either the Digital Future Lab in DUMBO or Data Future Lab in SoHo. The incubators are a public-private-academic partnership where entrepreneurs are nurtured by university partners with support from government and the private sector.
- **Port San Antonio Cybersecurity Hub**, San Antonio, Texas. 1,900-acre campus with available spaces for startup and established cybersecurity operations range from 4,000 to 32,000 square feet. Cybersecurity operations at the Port are anchored by the national headquarters for the Air Forces Cyber, also known as the Cyber Command.
- **The Hive**, Palo Alto, Calif. A venture fund & co-creation studio that builds and fosters startups focused on cybersecurity and other technologies including artificial intelligence and blockchain. In-house team of well-known company builders, serial entrepreneurs, and investors work alongside startup founders.
- **T-Rex**, St. Louis, Mo. A non-profit startup incubator & world-class venue providing the early-stage entrepreneur with low cost & flexible enterprise space, while serving the region with quality programming and inspiring community. SixThirty CYBER companies have access to co-working office

British cyber security startup accelerators



By [Tamlin Magee](#) | Jun 27, 2018

Share



The UK is only behind Israel and the United States in cybersecurity investment spending. Companies like Darktrace have proved that Britain is more than capable of producing world-class cyber startups - taking in valuations in hundreds of millions on the global stage.

But all startups have to begin somewhere.

And while there aren't an enormous number of accelerators and incubators in the UK that focus on cyber security alone, the list is growing. For example, British intelligence agency GCHQ recently partnered with the National Cyber Security Centre and Telefonica's startup division Wayra to mentor British companies with big ideas in cyber security - [and to promote the industry in the same way the fintech sector has enjoyed.](#)

GCHQ has concluded its first ever startup accelerator - here's how it went

A three-month cyber security accelerator wrapped up in Cheltenham last week, which saw GCHQ spooks mentoring startups with technical and commercial expertise

 By [Tamlin Magee](#) | Apr 03, 2017

GCHQ-backed startups tell UK government: give cyber the fintech treatment

GCHQ-selected startups believe Britain can boost its cybersecurity investment ranking with a similar commitment the government gave to the burgeoning fintech sector



Tamlin Magee
December 8, 2017

gency

ers



The second tranche of GCHQ-selected infosec startups has told the government that Britain should emulate the model it applied to encouraging the growth of homegrown fintech startups to cyber security.

Launched at the headquarters of the National Cyber Security Centre (NCSC) in Victoria, London last night, a group of startups that were selected to take part in the GCHQ-backed accelerator mingled with minister for the department of culture, media and sport (DCMS), Matt Hancock, and reflected that the UK's success in home-grown fintech should be repeated for security.



LES MODELES ANGLO SAXONS ET ISRAEL



contact



menu



UK Cyber Park Cheltenham

Project Promoters:
Barberry (developer) acting on behalf of the West Cheltenham Land Consortium.

Scale:
£600 million GDV.

Sector:
Specialist cyber security park, residential, retail and leisure.

Location:
Cheltenham, near Oxford.

Investment Type:
Loan capital as senior debt or as a development partner; long term commercial investment.

Programme:
Commencing in 2019.

Planning Status:
Local Plan allocation. Outline planning application Spring 2018.

westcheltenham.com



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WRITTEN BY

Adam Shepherd

NEWS

27 Jun, 2018

LORCA will spend millions on boosting security-focused startups and scale-ups

London's newest cyber security hub officially opened yesterday, offering 72 startups a space to scale and grow their businesses with the help of expert support and advice.

The London Office for Rapid Cyber Advancement (LORCA) is the recipient of £14.5 million in government funding, which it aims to supplement with £25.5 million in outside investment.

It will use the cash to provide startups and scale-ups with tech support, professional services, business advice and other forms of mentorship at Here East's Plexal tech campus in east London's Queen Elizabeth Olympic Park.



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LES MODELES ANGLO SAXONS ET ISRAEL

(17 universités ayant le label Centre d'excellence cyber)

Academic Centres of Excellence in Cyber Security Research

Recognising UK universities conducting internationally leading cyber security research.

PUBLISHED

28 March 2019

REVIEWED

28 March 2019

WRITTEN FOR ⓘ

[Individuals & families](#)

The NCSC and the Engineering and Physical Sciences Research Council (EPSRC) jointly recognise Academic Centres of Excellence in Cyber Security Research (ACE-CSR).

Following the most recent assessment panel, 17 universities have been recognised as ACE-CSR. These universities have met tough minimum standards and proven they have:

- commitment from the university's leadership team to support and invest in the university's cyber security research capacity and capability
- a critical mass of academic staff engaged in leading-edge cyber security research
- a proven track record of publishing high impact cyber security research in leading journals and conferences
- sustained funding from a variety of sources to ensure the continuing financial viability of the research team's activities

- [Queen's University Belfast](#)
- [University of Birmingham](#)
- [University of Bristol](#)
- [University of Cambridge](#)
- [Cardiff University](#)
- [University of Edinburgh](#)
- [University of Kent](#)
- [King's College London](#)
- [Lancaster University](#)
- [Imperial College London](#)
- [University College London](#)
- [Royal Holloway, University of London](#)
- [Newcastle University](#)
- [University of Oxford](#)
- [University of Southampton](#)
- [University of Surrey](#)
- [University of Warwick](#)



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LES MODELES ANGLO SAXONS ET ISRAEL

// A welcome to C5 Capital, from André Pienaar, Founder

I founded C5 back in 2014 as a specialist venture capital firm focused on cyber security, artificial intelligence, and cloud computing, having become increasingly aware first hand of the importance these areas are having in our world.

I strongly believe in building long term relationships with innovative companies which have a desire to grow and take on these challenges. At C5 Capital we have developed a specialist team with the knowledge and capabilities to nurture and support those we invest in, while continually adding to the public good.

We are always looking to invest in our network of partners and grow this portfolio so please, find out more about myself, our **Investment Team** and C5 Capital, and get in touch if you feel your organisation could help us shape the future.

Thank you, André Pienaar

The screenshot shows the C5 Capital website. At the top left is the C5 CAPITAL logo. To its right is a navigation menu with links: Who We Are, C5 Capital, C5 Accelerate, Team, Portfolio, News, Philanthropy, and Contact. Below the navigation is a large portrait of Sir Iain Lobban, a man in a dark suit and tie, smiling. To the right of the portrait is the text: **Sir Iain Lobban**. Below his name is a paragraph of text: "Sir Iain was the Director of the British Security and Intelligence agency GCHQ from mid-2008 to late 2014, having previously served as its Director-General of operations from 2004. His tenure represented more than ten years of operational delivery in counter-terrorism, cyber-security, support to Defence, and the prevention and detection of serious crime. He set new direction in Cyber Security for innovative partnerships internationally, with the private sector and with academia." Below this paragraph is another paragraph: "Sir Iain now focuses on the advocacy and demystification of Cyber Security, providing strategic advice and personal perspective, nationally and internationally, to governments and businesses. He is also active in entrepreneurship, in the broadest sense of the word."

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START-UPS CYBERSÉCURITÉ EN FRANCE : UN POTENTIEL QUI DOIT PASSER À L'ÉCHELLE

La cybersécurité reste un écosystème en forte croissance, qui met en valeur l'expertise mais également l'innovation. Les entrepreneurs français l'ont compris et n'hésitent pas à se lancer dans l'aventure. Cependant même si ce terreau est favorable, quels sont les facteurs qui empêchent les jeunes structures de s'épanouir pleinement et de dépasser les portes du marché français ?

UN ÉCOSYSTÈME FLORISSANT ET DYNAMIQUE



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LA SITUATION DE LA FRANCE FONDS INVESTISSEMENT CYBER (50M€ en 2018)

Alsid vient de boucler une Serie A de 13 millions d'euros, souscrite auprès de ses investisseurs historiques (360 Capital & Axeleo Capital) et Idinvest en leader de ce tour de table. Axeleo a décidé à cette occasion de partager la genèse de leur histoire avec l'équipe et les débuts de la société, dont ils ont été les témoins.

Cybersécurité : Sentryo lève 10 millions d'euros

LE 5 DÉC. 2018

La start-up française de cybersécurité CybelAngel lève 10 millions d'euros

Par Lucie Ronfaut | Mis à jour le 11/10/2018 à 10:41 / Pub

Wallix lève 36,8 millions d'euros pour devenir un champion européen de la cybersécurité

LEVÉE DE FONDS La société parisienne Wallix vient de boucler une levée de fonds de 36,8 millions d'euros. De quoi financer ses ambitions de croissance internationale pour devenir un champion européen de la cybersécurité.

Axa Strategic Ventures participe à la levée de fonds de 27,5 millions de dollars de la start-up new-yorkaise SecurityScorecard, spécialisée dans l'évaluation des risques cyber des entreprises. La cybersécurité est un thème privilégié par le fonds d'investissement de l'assureur, qui soutient déjà la start-up française Tanker, éditrice d'un logiciel de chiffrement.

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LES ELEMENTS CLES DU SUCCES: LES FONDS d'INVESTISSEMENTS

Actuellement il y a deux fonds spécifiques à la Cyber qui démarrent seulement

ACE MANAGEMENT, 120M€ ?

123CYBERD 80M€ ?

**POUR MOI C'EST UNE FAIBLESSE ESSENTIELLE DE LA FRANCE
IL FAUT CRÉER UN FONDS TRES IMPORTANT SPECIFIQUE LA CYBER**



🏠 > Entreprises & Finance > Banques / Finance

Les Fintech françaises ont récolté 365 millions d'euros en 2018, un nouveau record

✍️ Par [Juliette Raynal](#) | 09/01/2019, 8:00 | 1209 mots

**Pourquoi les Cybertech françaises ne sont pas plus performantes en levée de fonds?
pas assez innovantes, pas assez attractive, pas d'expertise dans les fonds?**



LES ELEMENTS CLES DU SUCCES, LES INCUBATEURS

Il n'existe pas d'incubateurs spécifique à la CYBER
6 incubateurs avec un peu de la Cyber

THALES STATION F
WAVESTONE
AIRBUS BIZLAB
IMT ATLANTIQUE
BELLE DE MAI
CREATIVE VALLEY

**POUR MOI C'EST UNE FAIBLESSE ESSENTIELLE DE LA FRANCE
IL FAUT CRÉER UN RESEAU DE QUELQUES INCUBATEURS DEDIES (3)**



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LES ELEMENTS CLES DU SUCCES: LA RECHERCHE UNIVERSITAIRE

En France il n'y a pas un réseau d'excellence cyber avec un label national reconnu (17 en UK)

Pole d'Excellence Cyber en Bretagne,



Grenoble

Le Grenoble Alpes Cybersecurity Institute s'installe sur le campus universitaire à Saint-Martin-d'Hères

Mardi 27 novembre 2018 à 20:16 - Par Élixa Montagnat, France Bleu Isère

SACLAY

17:58:55
L'expertise en cybersécurité et sûreté de fonctionnement de l'IRT SystemX au cœur du projet d'expérimentation de véhicules autonomes sur le territoire Paris-Saclay

**POUR MOI C'EST UNE FAIBLESSE ESSENTIELLE DE LA FRANCE
IL FAUT CRÉER UN RESEAU UNIVERSITAIRE D'EXCELLENCE CYBER**



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LES ELEMENTS CLES DU SUCCES: L'INNOVATION

Les points négatifs

- manque d'ambition des créateurs de startup (Israel)
- copier pour faire du souverain !!
- pas assez d'experts issus des centres de compétences
(DGSE/DT, ANSSI, DGA/MI) (de 100 à 200 départs par an)

(Team 8 recrute plus de 150 experts par an issus de 8200)

- Les fondamentaux:
- aller très vite sur les marchés hors de France
 - vendre des solutions packagées et « USER FRIENDLY »
 -



LES ELEMENTS CLES DU SUCCES: L'INNOVATION

Des startup à fort potentiel créés pas des experts renommés ayant une forte expérience dans la Cyber..

L'essaiage d'anciens de l'ANSSI dans les startups se porte bien

ALSID, ZIROC, CITADIL EXATRACK

TEHTRIS, QUARKSLAB

CYBELANGEL, YES WE HACK, SENTRYO, CYRATING

GATEWATCHER



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RIEN N'EST IRREVERSIBLE, BOUGEONS NOUS

EXEMPLE MARQUANT, LES NANO TECHNOLOGIES, MINATEC GRENOBLE

en 10 années l'un des 3 pôles mondiaux des nano

Les fonds, Les incubateurs, l'excellence universitaire, un organisme
moteur le CEA/LETI

CREONS TOUS ENSEMBLE LE (LES) CYBERTEC

FACE AUX USA IL FAUT CRÉER DES CYBERTEC EUROPEENS
FRANCE, ALLEMAGNE, HOLLANDE, SUEDE
FONCTIONNANT EN RESEAU