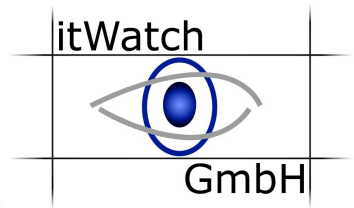
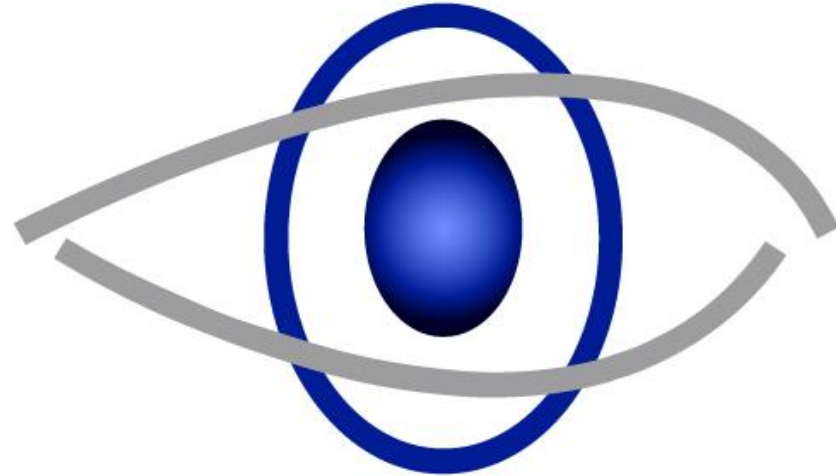


Your Security... ... Our Mission



itWatch



GmbH

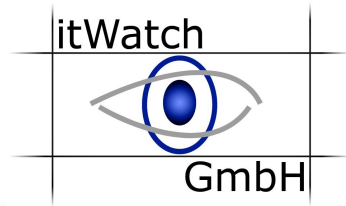
CYBERSECURITY MARKET: COOPERATION, INNOVATION, AND INVESTMENT STRATEGIES: Cybersecurity is top on Europe's Agenda

enisa Cybersecurity Market Analysis Conference
November 23-24, 2022

Ramon Mörl, Keynote CEO itWatch GmbH



Intro Ramon Mörl, Founder And CEO itWatch GmbH



- 👁️ 30 years of experience in IT security
- 👁️ Leading activities in projects for companies such as HP, IBM, Siemens, ICL and Bull in Belgium, Germany, France, Italy, Austria, Switzerland and the USA
- 👁️ Knowledgeable independent evaluator and consultant for the European Union, particularly in the area of ECMA and ISO standards for IT security
- 👁️ Since 2002 Founder and CEO of itWatch GmbH

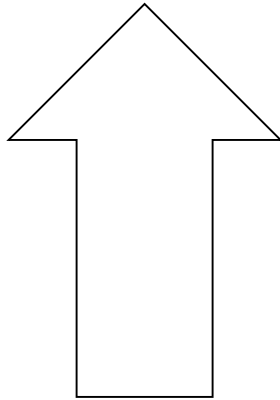


Cooperation Is Required At All Levels

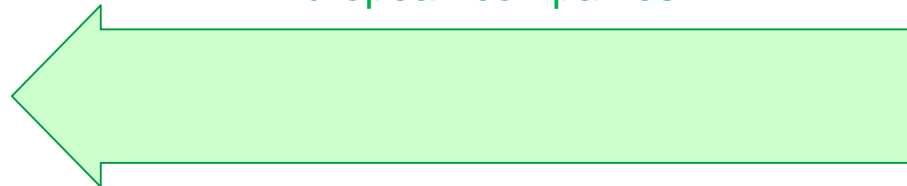
" Which protection should a CIO offer the users?"

Street lighting - financed by taxpayers' money - reduces crime on European streets.
*What do European states offer to protect citizens and resident industry in cyberspace?
What is needed?*

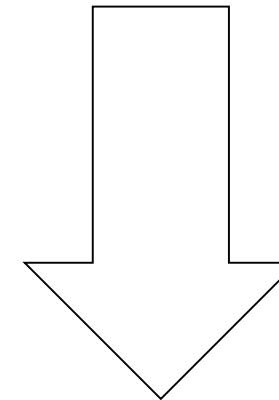
IT-Users



Tax money is spent to gain cyber-protection-insights. Are the insights shared with the European companies?



Government



Is there any Endpoint that enables users to work easily without any fear of viruses, trojans, phishing, spyware or other malware?

What protection do users need from their CIO?

European States' promise to protect citizens and industry in cyberspace –
A promise that can be fulfilled?"

Who Takes Control Of What?



Inside Companies

users/stakeholders acquire awareness
with a perfect match for their job
CEO, CTO, CISO, Admin, HR, R&D ...

User

IT departments protect users IT
“secure & usable IT services”

Outside Companies

States’ promise of protection in
cyberspace by legislation,
execution and regulation ...

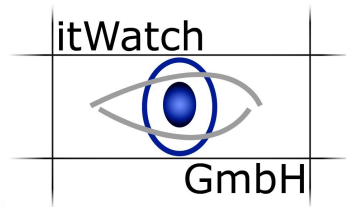
Cyber Security Vendors
Product manufacturers
Integrators
Pen testing
C-SOC & Managed Services
Supply Chains

...

- 👁️ The smaller a company or organization, the less their ability to solve the complex dependencies of Cyber-Security with their know-how & resources
- 👁️ Therefore feasible & hands-on instructions for action leading to visible protection on short notice are much needed for SME`s, municipalities,..., and all local & federal entities

The 'Threat Landscape' must be accompanied by an appropriate '**Protection Landscape**'

European SME's Protection In Cyber Space Is At Risk



- ◉ European governments are taking (limited) actions to strengthen European SME's cyber security on international plains that are not plane
- ◉ European SME's insufficient measures increase the risk along the value chains
- ◉ Who is not part of the solution, is part of the problem
- ◉ Blocking Points are
 - ◉ cost & complexity of needed protection measures are adding no business value
 - ◉ lack of decision making skills to evaluate the quality of complex security products & services, e.g.
 - ◉ technical, organizational and legal know-how
 - ◉ implementation-integration-know-how
 - ◉ lack of standardizations, reliable certificates, recommendations for security products & services

Security breaches, preparation of ransom attacks, ... remain invisible – so do the wider issues and threats to our infrastructure and dig. sovereignty

Cooperation Is The Only Solution

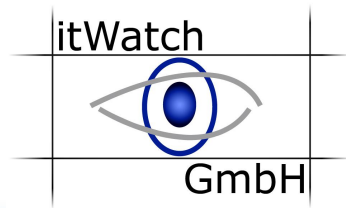
- 👁️ Strategies such as **security & privacy by design** are well-intentioned, but fail due to lack of qualified IT specialists in a VUCA-world*
- 👁️ **Security as an infrastructure and Cooperation** are therefore the best feasible approach for many areas
- 👁️ With the right architecture, any untrusted or less trusted IT can be operated on trusted security infrastructure



* volatile, uncertain, complex, ambiguous

- ◉ Buying decisions are often made by purchase departments, not by technical staff with cyber Security know-how!
What will the purchasing staff look for, if they cannot evaluate the difference between poor and proven security?
 - ◉ Low prices (and probably back doors coming along with that or little protection)
 - ◉ Known brands with large marketing budgets leading them to believe that investing in marketing equals investing in solid IT-security
 - ◉ The provider's presence in the market
 - ◉ Standard suppliers' offer: often solutions
 - ◉ with high seller-margins or
 - ◉ of mega sellers – because this is always right
- ◉ Hence purchasing decisions are often not driven by security metrics – meaning where do I get „best security“ for money – but criteria increasing risks for investments

What Are Drivers For Cyber Security Innovations?



- ⦿ High turnover?
- ⦿ High margin?
- ⦿ Colorful dashboards?
- ⦿ Publicity/ (white) papers?
- ⦿ Easy to sell?
- ⦿ Easy to use / easy to integrate?
- ⦿ Good sleep?

- ⦿ What about?
 - ⦿ Transparency & Security for users, administrators, processes
 - ⦿ Protection against threats
 - ⦿ Protection of Digital Sovereignty

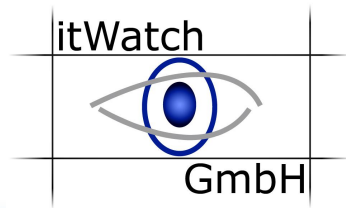
Europe's Position In Cyber Space: User not Driver!



- 👁️ China, Russia and US are dominating Cyber Space in favor of their interests
- 👁️ EU is in danger of being pulverized between these interests
- 👁️ At the same time, the pressure to modernize – i.e. digitize is high – in all areas
- 👁️ Urgency gives no time for quality in security related decisions
- 👁️ Hence politics, economy, citizens, companies and infrastructures in EU countries remain highly vulnerable



Reasons For European Research “Valley Of Death”



- ◉ Europe invests extensively in cyber security research, but Europe is not able to translate the research results into domestic value creation, because
 - ◉ integration and ergonomics are NOT considered valid research goals
 - ◉ Only research for technical innovation is considered as fundable research
- ◉ Research is financed by EU public funds without taking measures that research results are also used for leveraging EU’s cyber security abilities
- ◉ Procurement in the EU takes place mainly through tenders that request end products with high degree of market maturity
- ◉ The way of organizing procurement processes in the EU, namely in large complex entities/topics (border control, aircraft, national secure document production, ...), is an obstacle to innovation
- ◉ Cyber Security investments are utmost 1% of the total investments, but cyber security is a mandatory requirement that has to be ensured horizontally throughout complex supply chains



What Counts For 'Successful Cyber Security' In The EU?

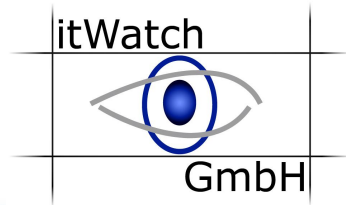
Example 1

- ◉ Crypto Hardware manufacturer for smartphones
- ◉ Product wins tender – but tender does not include mandatory turnover
- ◉ Product gets clearance for NATO restriction
- ◉ Company is sold for 70 Million Euro to North American global player
- ◉ Ministry of Finance earns huge amounts of taxes
- ◉ Know-how is lost for Europe

Example 2

- ◉ Company establishes product for hard disk encryption
- ◉ In order to get NATO restricted clearance hardware key store is required
- ◉ Company develops product – clearance takes many years ...
- ◉ Company moves production and headquarters to Malaysia – after 10 years no European business any more – but company is up and running well

What Counts For 'Successful Cyber Security' In The EU?



Example 3

- ◉ 2 European companies (device control and full disk encryption) are acquired by Israeli company
- ◉ 2 years are needed to integrate the products in their strategy
- ◉ Some years later the entire product line is dead

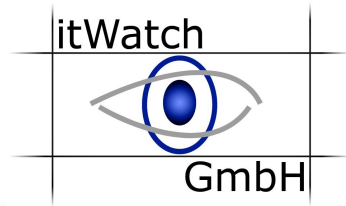
Example 4

- ◉ German security manufacturer is acquired by UK security manufacturer
- ◉ UK manufacturer sets up a second headquarter in the US
- ◉ Core products of formerly German company do not prove readiness for the global market, because of technical complexity and high cost for new business models (cloud, new OS, ...)
- ◉ Core products of formerly German company are dead
 - ◉ Developers are set free
 - ◉ Product managers are set free
 - ◉ Only sales for 'traditional UK/ US products' survive

Im Internet:

- **„Digitale Souveränität und die Einschätzung der Sicherheit von Lieferketten – eine Managementdisziplin“**
Problembeschreibung und Lösungsansätze“, [Vortrag von Ramon Mörl](#) am 01.02.2022 auf dem 18. Deutschen IT-Sicherheitskongress des BSI
- [Vortrag von Ramon Mörl](#) "Alle ausführbaren Objekte/Anwendungen überall erkennen, qualifizieren und sicher nutzen: wie geht das?"
[Vortrag von Ramon Mörl](#) "Ohne ausführbares Objekt kein Angriff: alle Anwendungen sicher nutzen – was braucht man dazu?"
[Interview mit Ramon Mörl](#): Wie nutzt man fremde Daten in den eigenen Daten ohne Risiko? Schadcode, Makros, embedded Apps ... ob in Büro, Industrie, Leitstelle. (Alle Themen von der it-sa 365 2021).
- Unter dem Motto "Cyber Security - Rethinking Cyber Strategies in Tumultuous Times" fand im April 2021 die siebte mcsc des Sicherheitsnetzwerkes München e.V. statt. [Ramon Mörl diskutierte](#) in einem Panel mit dem Titel **„Corporate Cyber Risk Management – What Makes the Difference?“** (Munich Cyber Security Conference (mcsc) 2021)
- **„Data Centric Cyber Security – denn eigentlich geht es doch um Daten“**
[Vortrag von Ramon Mörl](#) (it-sa 365 2020)

itWatch Product Overview



- [DeviceWatch](#) Device control
- [ApplicationWatch](#) Application control
- [XRayWatch](#) Block and audit files and content
- [PDWatch](#) Mobile encryption both locally and centrally
- [CDWatch](#) Media-based protection
- [DEvCon](#) Cascading device event console (system management)
- [ReCAppS](#) Virtual lock
- [DataEx](#) Secure deleting and formatting
- [PrintWatch](#) Print control
- [AwareWatch](#) Security Awareness in real-time
- [ReplicationWatch](#) Secure data replication
- [RiskWatch](#) Risk assessment with one click
- [LogOnWatch](#) Securely passwords on applications and login
- [MalWareTrap](#) APT detection & isolation
- [CryptWatch](#) Encryption on unprotected third party computers
- [Secure Keyboard](#) Complete solution BadUSB

itWESS – one single cyber defense agent!



Data Lock - Data Wash and Sanitizing: <http://www.itwash.de/>

[Product Overview for Download](#)

- [Private Data Room](#) the protection of the crown jewels against unauthorized data use
- [itWESS2Go](#) Mobile solution for all security classifications

Let's Discuss Our European Issues At Hand!



THANK YOU !

Ramon.Moerl@itWatch.de