

## **Spain Cybersecurity - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

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### **Report description:**

The Spain Cybersecurity Market size is estimated at USD 2.43 billion in 2025, and is expected to reach USD 3.44 billion by 2030, at a CAGR of 7.16% during the forecast period (2025-2030).

Digitalization of different business and operational sectors exposes entities to data breaches and cyber-attacks, creating demand for cybersecurity solutions and services in Spain. Therefore, vendors are developing new security offerings to provide users with a secure and protected experience in the Spanish cybersecurity market.

### **Key Highlights**

- Enterprises in Spain are undergoing rapid digitalization, following the global Industry 4.0 trends. There is a rising integration of digital platforms among industries and different business sectors, expanding their reach through the Internet. Such automation and integration have made the supply chain vulnerable, creating demand for data protection and cybersecurity solutions to cater to the growing cyber attacks in the country.
- Digital transformation, characterized by integrating digital technologies into all business operations, has become crucial for organizations seeking enhanced efficiency and competitive advantage. The expansion of cloud-based infrastructure, the interconnectedness of IoT devices, and the utilization of AI for data analytics have collectively propelled businesses into a new period of technological sophistication. However, this digital renaissance has also expanded the attack surface for cyber threats, necessitating a proportional growth in cybersecurity strategies.
- Recognizing the high potential damages arises from realizing that attacks on critical infrastructure extend beyond financial losses. Disruptions in essential services can negatively influence society, impacting public safety, national security, and economic stability. Incidents like ransomware attacks targeting healthcare institutions or sophisticated cyber campaigns aimed at disrupting energy grids emphasize the urgency of strengthening the cybersecurity defenses of critical infrastructure. Consequently,

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governments, enterprises, and cybersecurity solution providers are expected to invest significantly in advanced technologies and strategies to mitigate the risks associated with these high-stakes scenarios.

- The market needs a more skilled workforce to tackle the cybersecurity requirements and growth. The heavy influx of more prominent multinational business companies in the country removes potential cybersecurity talent, creating a deficit of human capital for the rest of the potential market. According to ISC's Cybersecurity Workforce Study, in 2023, the number of cybersecurity professionals in Spain was 1,82,140. Therefore, Spain is witnessing a growing demand for skilled professionals and cybersecurity experts to address the increasing number of cyber attacks.

## Spain Cyber Security Market Trends

### Network Security Type Offering Segment is Expected to Hold Significant Market Share

- Traditional network security tools monitor and control incoming and outgoing network traffic based on predetermined security rules. These systems monitor network traffic for suspicious activity, violations, or pre-established security policies.
- The development of 5G security in Spain to protect 5G infrastructure and 5G-enabled devices against cyberattacks, data loss, malware, hackers, and other threats due to the 5G network's increasing use of virtualization, network slicing, and software-defined networking (SDN), making it vulnerable to network attacks, and fueling the adoption of network security solutions.
- The increasing cyberattacks on Spain due to the conflicts between Russia and the European Union have raised the need for cyber security solutions in the country's enterprise and governmental service level, fueling market growth. For instance, in October 2023, the Spanish government reported that many public and private websites, including the city of Granada's bus service application, were targeted in a distributed denial-of-service (DDoS) attack claimed by pro-Russian hackers, showing the importance of cybersecurity solutions for applications, network, and infrastructure security of the country, which is expected to fuel the adoption of cybersecurity solutions in Spain during the forecast period.
- The increasing connectivity and digital transformation initiatives across industries contribute significantly to the demand for network security. The expansion of connected devices, the Internet of Things (IoT), and the adoption of emerging technologies result in expanded network landscapes.
- The expansion of IoT, 5G, and connected devices strengthens the potential attack surface, necessitating robust security measures to safeguard against unauthorized access and potential vulnerabilities. Network security plays a pivotal role in securing the complex web of interconnected systems, devices, and applications that serve as the basis of modern enterprises.
- 5G facilitates the proliferation of mobile and IoT devices with high-speed, low-latency connectivity. Consequently, there is a greater need for mobile security solutions, including mobile device management (MDM), mobile threats defense (MTD), and secure containerization to protect sensitive data and applications on mobile devices. According to the European 5G Observatory, the 5G population coverage in September 2023 in Spain was 82.3%.

### IT and Telecommunication End-user Segment is Expected to Hold Significant Market Share

- Information technology (IT) and telecommunications play a vital role in businesses, government agencies, and organizations in Spain. The need for robust cybersecurity measures has become crucial with the increasing reliance on interconnected networks, cloud computing, and digital communication. IT and telecom end users form a substantial portion of the Spanish cybersecurity market as they seek to protect their sensitive data, networks, and communications from evolving cyber threats.
- The IT and telecom sector is experiencing robust growth in the Spanish cybersecurity market, driven by several key factors. Firstly, the rising frequency and complexity of cyber threats targeting IT and telecom infrastructure have significantly driven

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organizations in this sector to enhance their cybersecurity measures.

- Further, cloud deployment is expected to gain prominence in the market, owing to the industry's increased recognition of the need for comprehensive cloud security solutions. In February 2024, Microsoft planned to quadruple its investments in artificial intelligence (AI) and cloud infrastructure in Spain, spending EUR 1.95 billion (USD 2.1 billion) in the next two years.
- Furthermore, in April 2024, IBM and the government of Spain collaborated to advance the national AI strategy and build the world's leading Spanish language AI models. The strategic collaboration will strengthen Spain's open and ethical AI initiatives to stimulate economic and technical efforts.
- According to Mastercard, technology and services were the industries with the highest share of cyberattacks in Spain, accounting for 32 occurrences between January 2021 and August 2023. Meanwhile, the energy industry in Spain's strategic sector had the most cybersecurity incidents registered in Spain in 2022, with around 203 occurrences, while the tax and financial systems ranked second, with 95 incidents registered in the same year.

## Spain Cyber Security Industry Overview

The Spanish cybersecurity market is fragmented due to the presence of global players and small and medium-sized enterprises. Some of the major players in the market are Telefonica Cybersecurity & Cloud Tech SLU, Microsoft, Indra Sistemas SA, IBM Corporation, and Grupo S21Sec Gestion SAU. Players in the market are adopting strategies such as partnerships and acquisitions to enhance their product offerings and gain sustainable competitive advantage.

- February 2024: Microsoft quadrupled its investment in AI and cloud infrastructure in Spain to promote the deployment of responsible and secure artificial intelligence in companies and public administration with the reinforcement of national cybersecurity.
- November 2023: Accenture acquired Innotec Security, a privately held company specializing in cybersecurity-as-a-service, cyber resilience, and cyber risk management, expanding its capabilities and footprint in Spain.

### Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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