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

Market Report | 2025-07-01 | 136 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License $4750.00
- Team License (1-7 Users) $5250.00
- Site License $6500.00
- Corporate License $8750.00

Report description:

Europe Cybersecurity Market Analysis

The Europe cybersecurity market size stands at USD 63.12 billion in 2025 and is forecast to reach USD 105.45 billion by 2030, reflecting a 10.81% CAGR through the period. Mandatory regulation, rising geopolitical risk, and an accelerating shift to sovereign cloud platforms elevate cybersecurity from optional spend to core operational outlay across the region. Enforcement of the Network and Information Security Directive 2 (NIS2) and the Digital Operational Resilience Act (DORA) anchors spending plans, while the Russia-Ukraine conflict fuels a 30% rise in ransomware incidents that heightens board-level risk awareness. Cloud-first strategies persist, yet hybrid deployments gain traction as enterprises balance sovereignty with scale. Vendor consolidation intensifies as suppliers acquire incident-response and managed-services capabilities to meet compliance demand. Heightened competition, however, is tempered by a 299,000-professional skills deficit that stretches internal security teams and bolsters managed service uptake.

Europe Cybersecurity Market Trends and Insights

EU-wide Enforcement of NIS2 and DORA Elevating Mandatory Security Spend

NIS2 expands coverage to more than 160,000 European entities and introduces penalties of up to EUR 10 million or 2% of global turnover, which is shifting cybersecurity budgets from discretionary to compulsory . DORA imposes parallel ICT-risk mandates on financial entities, forcing banks such as Belfius to restructure vendor portfolios for resilience. The legal scope drives average security spending to 9% of IT budgets, while 89% of firms report new hiring needs. Integration-ready platforms and managed services benefit most because they streamline multi-jurisdiction reporting, sustain compliance, and reduce penalty exposure.

Surge in Sophisticated Ransomware Linked to Russia-Ukraine Conflict

Ransomware attacks on European organizations climbed 30% in 2024 as threat actors weaponized geopolitical tensions. Manufacturing bore 84% growth in strike volume during Q1 2025 with breach costs topping USD 5.56 million, eclipsing previous crisis-era losses. Healthcare incidents reached 309 in 2023, half involving ransomware, prompting an EU action plan that allocates additional incident-response resources. Persistent groups such as LockBit executed 1,700 attacks before takedown efforts, underlining the need for behavior-based detection and layered response services.

Acute Cybersecurity Skills Shortage Limiting Implementation Capacity

Europe lacks more than 299,000 qualified cybersecurity professionals, and 76% of existing staff possess no formal credentials. Germany posts double-digit growth in spending yet struggles to fill vacancies, while France expects 15,000 open roles despite salaries approaching USD 98,100. Skills scarcity slows project rollouts, particularly in cloud security and OT protection, compelling enterprises to shift toward managed detection and response as a substitute for in-house capability.

Other drivers and restraints analyzed in the detailed report include:

Rapid Shift to European Sovereign Clouds Driving Zero-Trust Architectures / Expansion of 5G Private Networks in German and Nordic Manufacturing Hubs / Rising Compliance Costs Straining Mid-Market Enterprise Budgets /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Solutions accounted for 68% of the Europe cybersecurity market share in 2024, underpinned by integrated platforms that bundle cloud, identity, and network controls into unified consoles. The Europe cybersecurity market size for services, including managed detection and response, is projected to expand at a 13.8% CAGR to 2030 as enterprises offset workforce shortages by outsourcing daily operations. High-growth comes from mid-market firms newly covered under NIS2 that prefer single-subscription service bundles over multi-vendor toolkits.

Managed services providers tailor compliance dashboards that automate evidence collection across the EU's heterogeneous regulatory regimes. Concurrently, professional-services demand remains steady as large banks and manufacturers architect zero-trust reference models and post-quantum roadmaps. Integrated solution vendors that embed workflow automation and native reporting enjoy cross-sell advantage, while niche point-product suppliers face consolidation pressure.

Cloud deployments represented 57.5% of 2024 revenue as enterprises embraced elasticity and evergreen updates. Hybrid models now register the swiftest 15.2% CAGR because sovereignty rules compel companies to retain sensitive data inside EU borders while still tapping global hyperscaler analytics. The Europe cybersecurity market size for hybrid architectures grows as financial institutions pilot quantum-secure metro networks that keep keys on premises yet route telemetry to analytics engines in sovereign clouds.

On-premise installations persist in defense and public-sector workloads that require full control of hardware. Yet even these environments integrate cloud-based threat intelligence feeds, creating blended topologies. Vendors therefore package identical policy engines across SaaS and appliance form factors so administrators can enforce uniform controls regardless of workload location.

The Europe Cybersecurity Market Report Segments the Industry Into by Offering (Solutions, and Services), Deployment Mode (On-Premise, and Cloud), End-User Vertical (BFSI, Healthcare, IT and Telecom, Industrial and Defense, Manufacturing, Retail and E-Commerce, Energy and Utilities, Manufacturing, and Others), and End-User Enterprise Size (Small and Medium Enterprises (SMEs), and Large Enterprises). And Country.

List of Companies Covered in this Report:

Cisco Systems Inc. / Palo Alto Networks Inc. / IBM Corporation / Check Point Software Technologies Ltd. / Fortinet Inc. / Thales Group (Thales DIS) / Siemens AG (Siemens Digital Industries) / Atos SE (Eviden) / Accenture PLC (Security Services) / Kaspersky Lab JSC / Trend Micro Inc. / Sophos Ltd. / F-Secure Corp. / Darktrace PLC / Orange Cyberdefense (Orange SA) / Airbus Defence and Space GmbH (CyberSecurity) / Capgemini SE / Deutsche Telekom Security GmbH (T-Systems) / BAE Systems Applied Intelligence / Rapid7 Inc. / CrowdStrike Holdings Inc. / Nexus Group / Secunet Security Networks AG / Rohde & Schwarz Cybersecurity GmbH /

Additional Benefits:

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

Table of Contents:

5.5.7 Rest of Europe (Nordics, Benelux excl. NL, CEE, Balkans)

6 COMPETITIVE LANDSCAPE
6.1 Market Concentration
6.2 Strategic Moves
6.3 Market Share Analysis
6.4 Company Profiles {(includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share for key companies, Products and Services, and Recent Developments)}
6.4.1 Cisco Systems Inc.
6.4.2 Palo Alto Networks Inc.
6.4.3 IBM Corporation
6.4.4 Check Point Software Technologies Ltd.
6.4.5 Fortinet Inc.
6.4.6 Thales Group (Thales DIS)
6.4.7 Siemens AG (Siemens Digital Industries)
6.4.8 Atos SE (Eviden)
6.4.9 Accenture PLC (Security Services)
6.4.10 Kaspersky Lab JSC
6.4.11 Trend Micro Inc.
6.4.12 Sophos Ltd.
6.4.13 F-Secure Corp.
6.4.14 Darktrace PLC
6.4.15 Orange Cyberdefense (Orange SA)
6.4.16 Airbus Defence and Space GmbH (CyberSecurity)
6.4.17 Capgemini SE
6.4.18 Deutsche Telekom Security GmbH (T-Systems)
6.4.19 BAE Systems Applied Intelligence
6.4.20 Rapid7 Inc.
6.4.21 CrowdStrike Holdings Inc.
6.4.22 Nexus Group
6.4.23 Secunet Security Networks AG
6.4.24 Rohde & Schwarz Cybersecurity GmbH

7 MARKET OPPORTUNITIES AND FUTURE OUTLOOK
7.1 White-space and Unmet-Need Assessment

SCOTTS INTERNATIONAL

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

Market Report | 2025-07-01 | 136 pages | Mordor Intelligence

To place an Order with Scotts International:
- - Print this form
- - Complete the relevant blank fields and sign
- - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	$4750.00
	Team License (1-7 Users)	$5250.00
	Site License	$6500.00
	Corporate License	$8750.00
	VAT	
	Total	

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*		Phone*	
First Name*		Last Name*	
Job title*			
Company Name*		EU Vat / Tax ID / NIP number*	
Address*		City*	
Zip Code*		Country*	
		Date	2026-03-02
		Signature	

Scotts International. EU Vat number: PL 6772247784
tel. 0048 603 394 346 e-mail: support@scotts-international.com
www.scotts-international.com