



**CYBER|IRELAND**  
IRELAND'S CYBER SECURITY CLUSTER

# Cluster Strategy

**2024-2027**

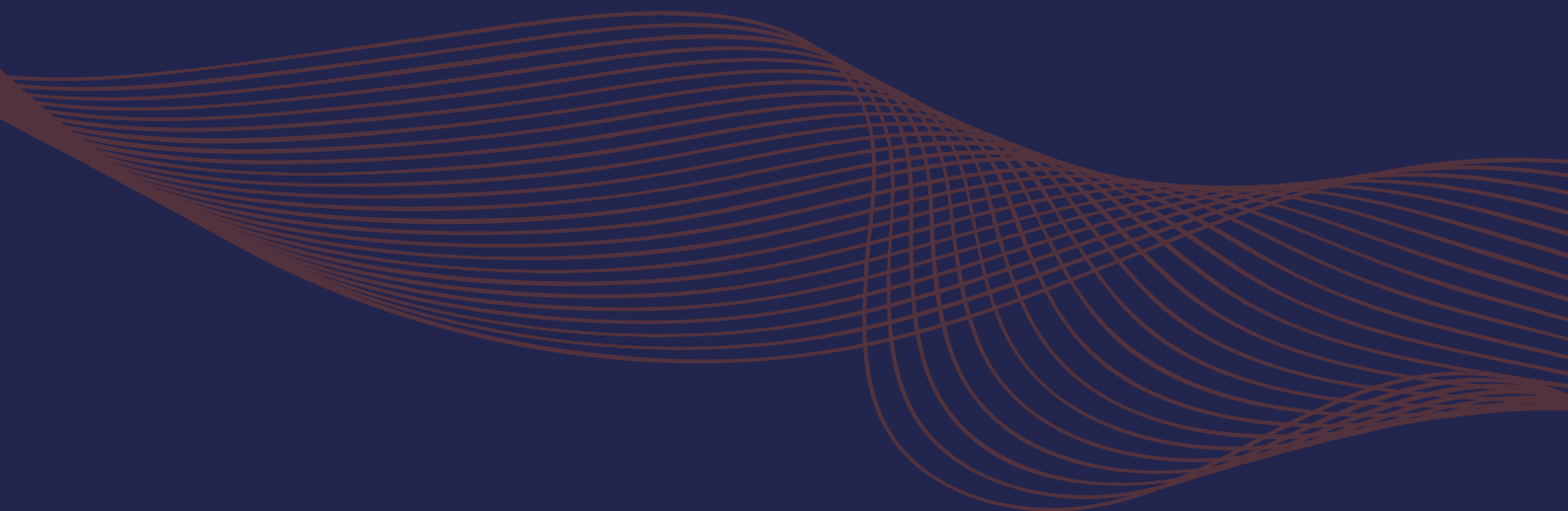
**Connecting the cyber security  
sector for business growth**

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[www.cyberireland.ie](http://www.cyberireland.ie)

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# Introduction

**Cyber Ireland is the national cyber security cluster organisation, which brings together industry, academia and government to represent the needs of the cyber security ecosystem in Ireland and support its growth. The cluster is industry-led, hosted at Munster Technological University and is supported by government through the National Cyber Security Centre, Enterprise Ireland and IDA Ireland.**

We represent over 160 member organisations nationwide including 90 Irish start-ups and SMEs, 45 MNCs and 15 Universities and training providers; we now provide a collective voice for the cyber security sector. The cluster has delivered activities across four workstreams of:

- 1) Building the community;
- 2) Developing a sustainable talent pipeline;
- 3) Enhancing collaborative research and development; and
- 4) Supporting the growth of the domestic sector and foreign direct investment (FDI).

Cyber Ireland was launched in 2019 out of the need to represent the sector and address the cyber security skills shortage. Since 2019, Cyber Ireland has developed from a start-up organisation to a national representative body and recognised best in class cluster organisation in Ireland. After four years, now is the opportune time to reflect on what has been achieved and develop the cluster's new strategy to realise its ambition to 2030.

## Cyber Security Sector Strengths

The "State of the Cyber Security Sector 2022" report<sup>1</sup> mapped the size and importance of Ireland's cyber security sector for the first time, establishing that there are 489 companies employing 7,300 professionals, with revenues of over €2bn and contributing €1.1bn to the economy annually. Ireland's cyber security sector has competitive advantages in comparison to other leading regions regarding a higher number of firms, employees, sector revenue and gross value added (GVA) per capita.

Ireland is a European hub for multi-national cyber security operations as well as having a growing number of indigenous cyber security start-ups and scale-ups that are exporting globally.

The sector has a strong talent pool with over 7,300 people employed and approximately 30,000 professionals in Ireland with cyber security skills.

Ireland is a geo-politically stable and trusted location in Europe. It has a reputation for military neutrality and a track record in promoting international peace and cooperation. It is a trusted location as the leading data hosting market in Europe hosting over 30% of Europe's data.

<sup>1</sup> <https://cyberireland.ie/state-of-the-cyber-security-sector-in-ireland-2022/>

## Achieving Our Cyber Potential 2030<sup>2</sup>

On current growth rates of 10%, there is the opportunity to grow the sector by 10,000 jobs by 2030, contributing €2.5bn per annum to the economy (GVA). To reach over 17,000 people employed in the sector would require recruiting approximately 1,000 additional people per annum. Demand for cyber security roles has trebled over the past four years from 2019 to 2022, with over 6,700 posts advertised in 2022 compared to 2,000 in 2019. With the potential to grow the sector's employment, this would require recruiting approximately 1,000 additional people per year.

Ireland requires a strong domestic cyber security sector with companies of scale that can deliver high value services to provide cyber resilience for the country and compete internationally. Given the priority of, and investment in, cyber security for the EU, there are opportunities for Irish companies to target and better penetrate the European market. Irish companies can also benefit from increased international investment in cyber security to fund expansion and growth in operations.

Ireland can build on its strengths as an international hub in Europe to further grow appropriate FDI in cyber security. Existing cyber security companies here can be supported to move up the value chain to highly skilled and productive jobs in engineering, development and research, while attracting new FDI. Ireland can also become the leading location in Europe for MNCs' cyber security operations across technology, financial services, healthcare and other sectors due to its strong talent pool, business environment, track record, and as a trusted location.

The opportunity now exists for Ireland to capitalise on its strengths and competitive advantages to develop a leading cyber security sector in Europe, and globally, providing resilience domestically and competing internationally.

## Cyber Ireland as the Driver

Today's, and tomorrow's, challenges demand new business models and ways of collaborating. No single company, university or government agency can solve these complex challenges alone. Only through cooperation and collaboration across organisational, political and cultural boundaries will they be addressed. Clusters provide a neutral cooperation platform and are the future way of collaborating.

In four years, Cyber Ireland has proven successful in building the community, facilitating connections, and supporting collaboration across our key activities. These initial wins have established the potential for further growth and success through the cluster model.

In the next phase of Cyber Ireland, the cluster aims to be the driving force to deliver on Ireland's cyber potential. To do so, we must move from a triple helix model of industry-academia-government to coordinating and cooperating with the broader cyber security ecosystem. Cyber Ireland sits at the centre of the ecosystem, coordinating and connecting industry and wider ecosystem to drive business growth and position Ireland internationally.

Dr Eoin Byrne  
Cluster Manager, Cyber Ireland



*Eoin Byrne*

<sup>2</sup> <https://cyberireland.ie/state-of-the-cyber-security-sector-in-ireland-2022/>

# Cluster Strategy Methodology

The development of our new strategy aimed to:

- **Be ambitious** with the vision to have a transformational rather than incremental impact.
- **Learn from international leading clusters** and benchmark the cluster's management and performance in Europe.
- **Create a shared vision** for the cluster organisation and cyber security sector in Ireland, driven by our members.
- **Reflect on what has been achieved**, what's worked and what has not.

## How we developed the strategy

### Cluster Strategy Development



International Cluster Expert



Key stakeholder Interviews



Cluster Member Survey



Cluster Organisation Assessment



International Review of Clusters



Workshops- Industry, SME and Regions



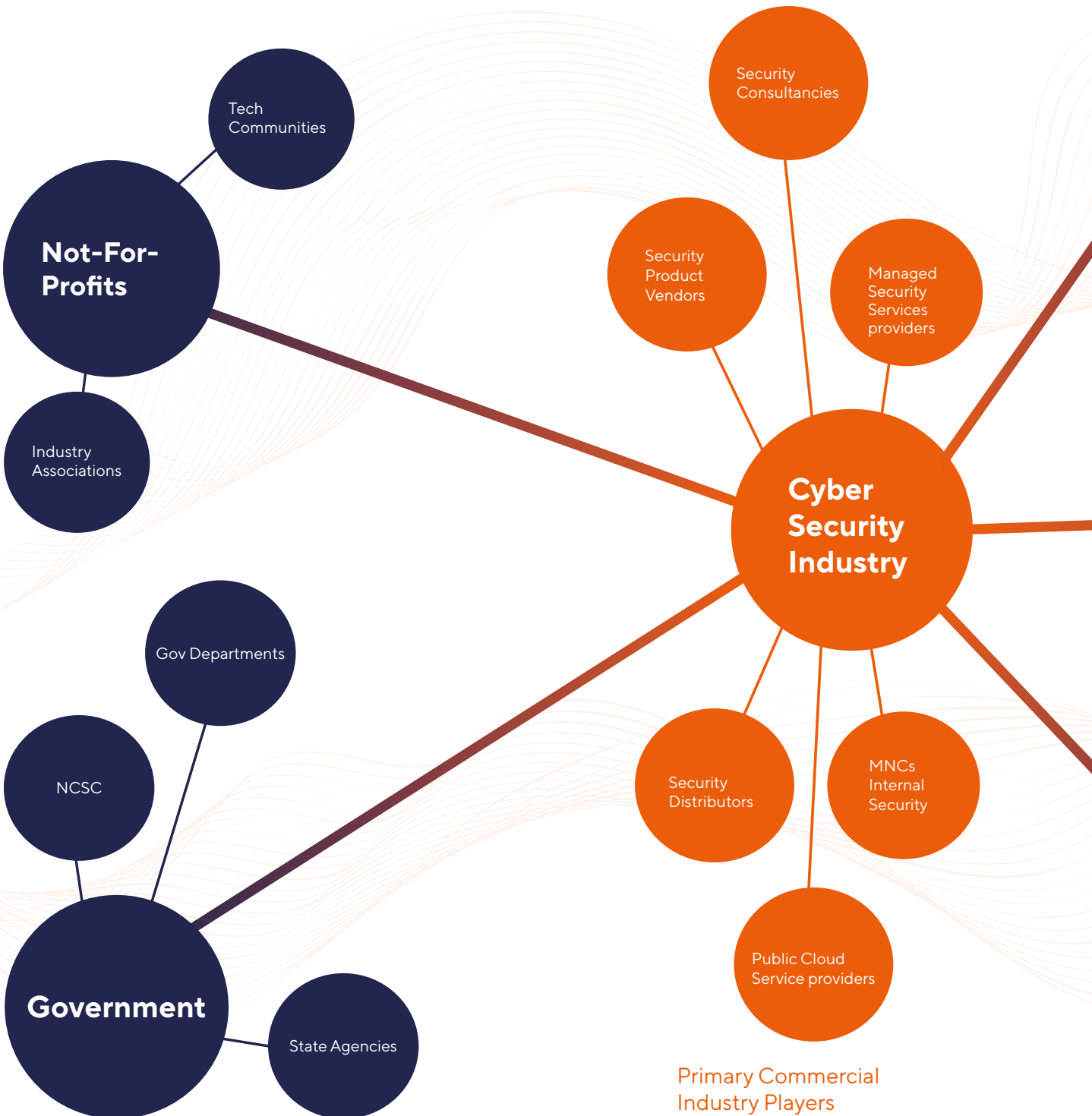
Strategy Launch

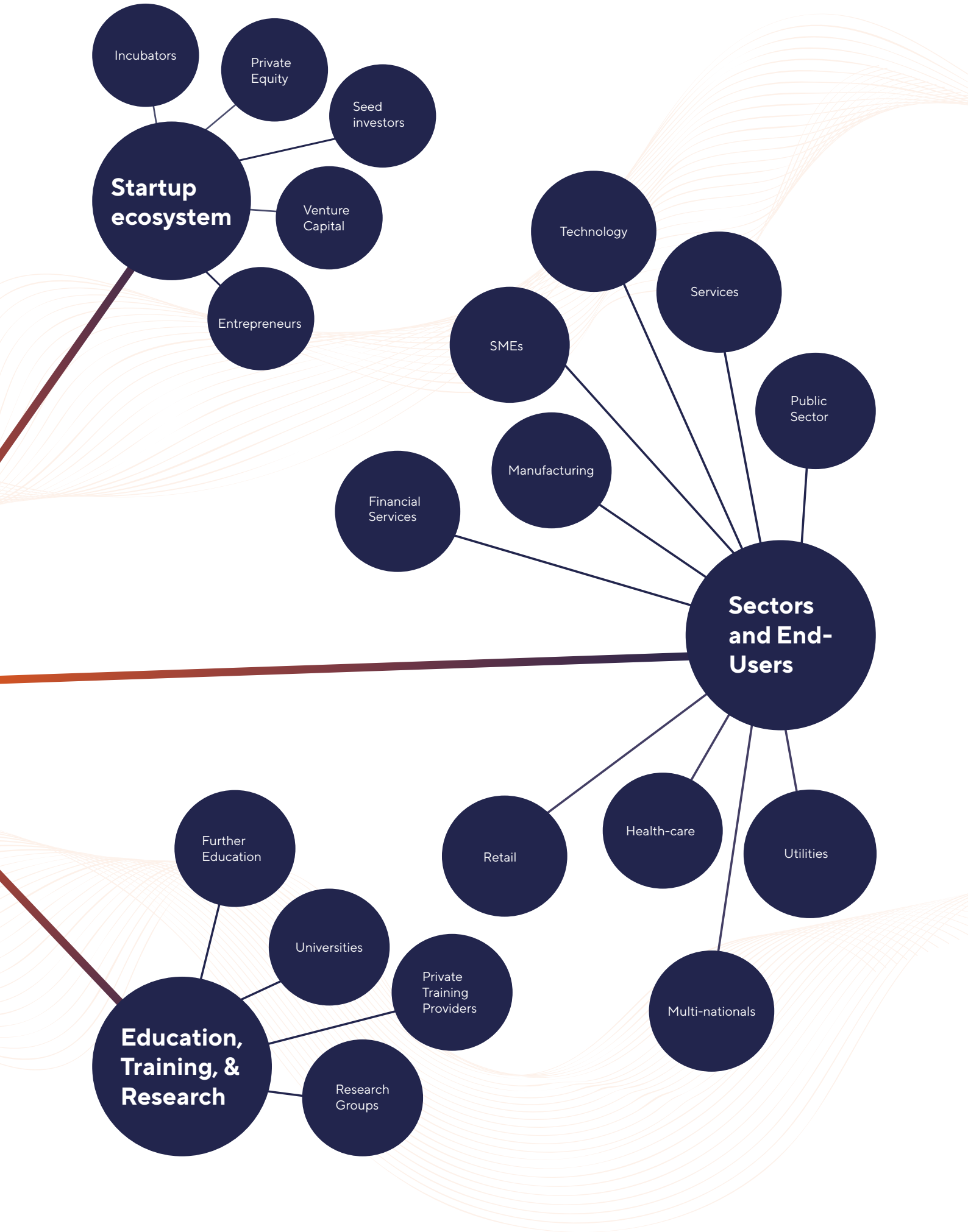
# Cluster Ecosystem Map

Many organisations and stakeholders must work together to achieve Ireland’s Cyber potential. **Cyber Ireland will be the coordinator at the centre to drive business growth.**

## Ireland's Cyber Security Ecosystem

Ecosystem Contributors and Stakeholders





# Our Purpose – Why We're Here

*Cyber Ireland connects the cyber security sector in Ireland to drive collaboration, talent development and innovation for business growth.*



# Focus Areas

The Focus Areas are the strategic pillars, or priorities, of the cluster organisation to deliver our purpose. Each of the Focus Areas has a goal with services to achieve the goal.

## Focus Areas



### Build the Community

- a. Facilitate Communities
- b. Connecting the Sector
- c. Driving Collaboration



### Develop the Workforce

- a. Understanding Industry Demand and Needs
- b. Working with Education and Training Providers
- c. Promoting cyber security careers, pathways and diversity



### Drive Business Growth

- a. Supporting Business Growth
- b. Facilitating innovation, new solutions and start-ups
- c. Connecting the sector globally



### Advocate and Promote

- a. Representing the Sector
- b. Providing Industry Research and Reports
- c. Promoting the Sector

# 1. Build the Community

**Goal: To bring together the cyber security sector, connect organisations, facilitate information sharing and drive collaboration.**

**Initiatives:**

- a. Facilitating Communities**
- b. Connecting the Sector**
- c. Driving Collaboration**

Cyber Ireland provides a neutral cooperation platform to facilitate communities, connect organisations, build trust, and support collaboration in our key activities. A strong community builds the foundation to progress our goals, address challenges and grow the sector.

The regional chapters provide a forum for the cyber security community across Ireland and to link with our national activities. The Special Interest Groups (SIGs) connect organisations with common areas of interest or specific technology areas, with a goal of information sharing and collaboration to address common challenges.

We deliver a series of national and regional events, including our national conference, to bring the sector together for leaders and professionals to meet, share and do business.

We will connect the cyber security sector and build the community by partnering with key stakeholder groups in the ecosystem such as industry associations and technical communities both in Ireland and internationally.



## 2. Drive Business Growth

**Goal: Support business growth and the development of new innovations and solutions.**

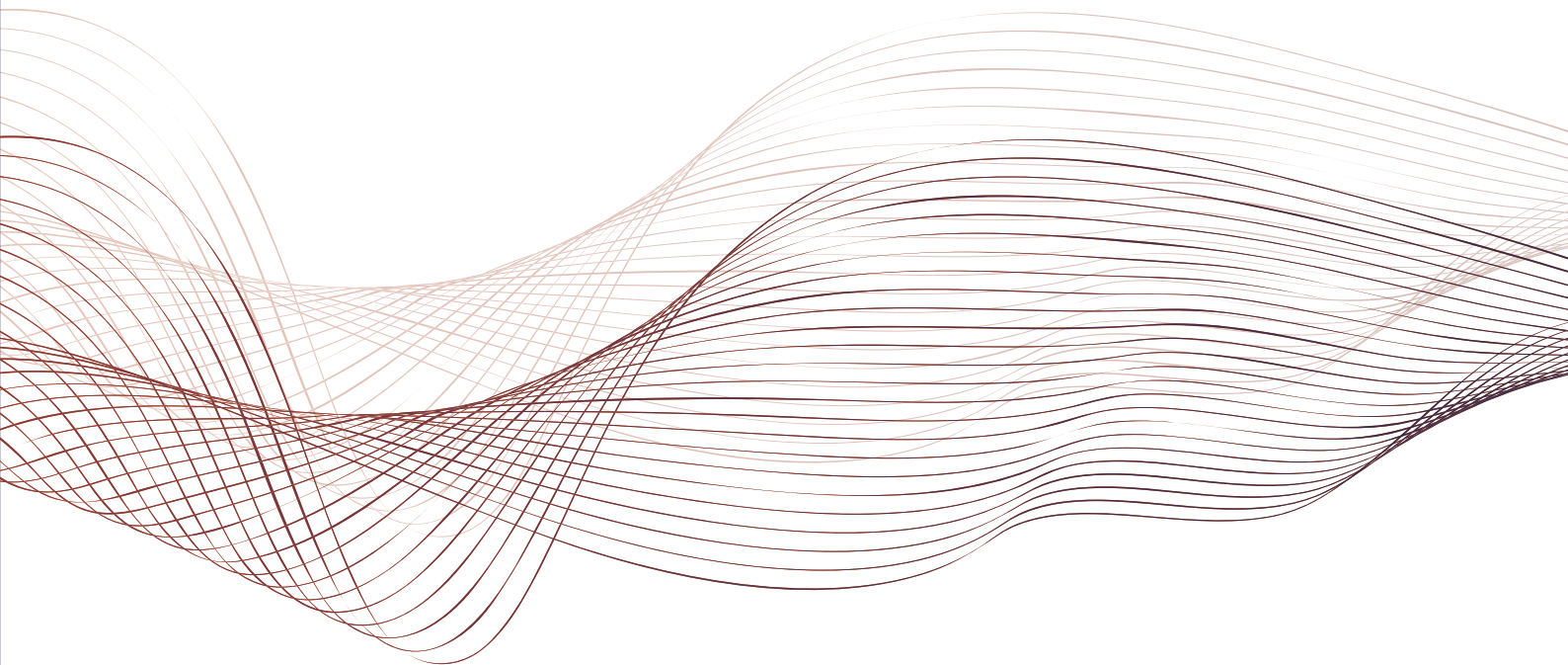
**Initiatives:**

- a. Supporting Business Growth**
- b. Facilitating innovation, new solutions and start-ups**
- c. Connecting the sector globally**

To accelerate the growth of the sector we must support a vibrant start-up ecosystem and scale SMEs to deliver high value services and products globally. We will continue to support FDI attraction and growth in both cyber security MNCs and diversified companies across technology, financial services, healthcare, and other sectors with international cyber security operations in Ireland.

To drive innovation, new solutions and start-ups developed in Ireland, we will explore the security challenges of enterprises, government and society and facilitate connections to customer and end-users to better understand their security needs and challenges.

Cyber Ireland will connect globally with target markets for cyber security solutions from the All-Island market to Europe and internationally. We will continue to work with European Cyber Security Organisation and be the national representative for their activities in Ireland, as well as working internationally with cyber security organisations and clusters.



# 3. Develop the Workforce

**Goal: Support a sustainable pipeline of cyber security talent to meet industry demand and needs.**

**Initiatives:**

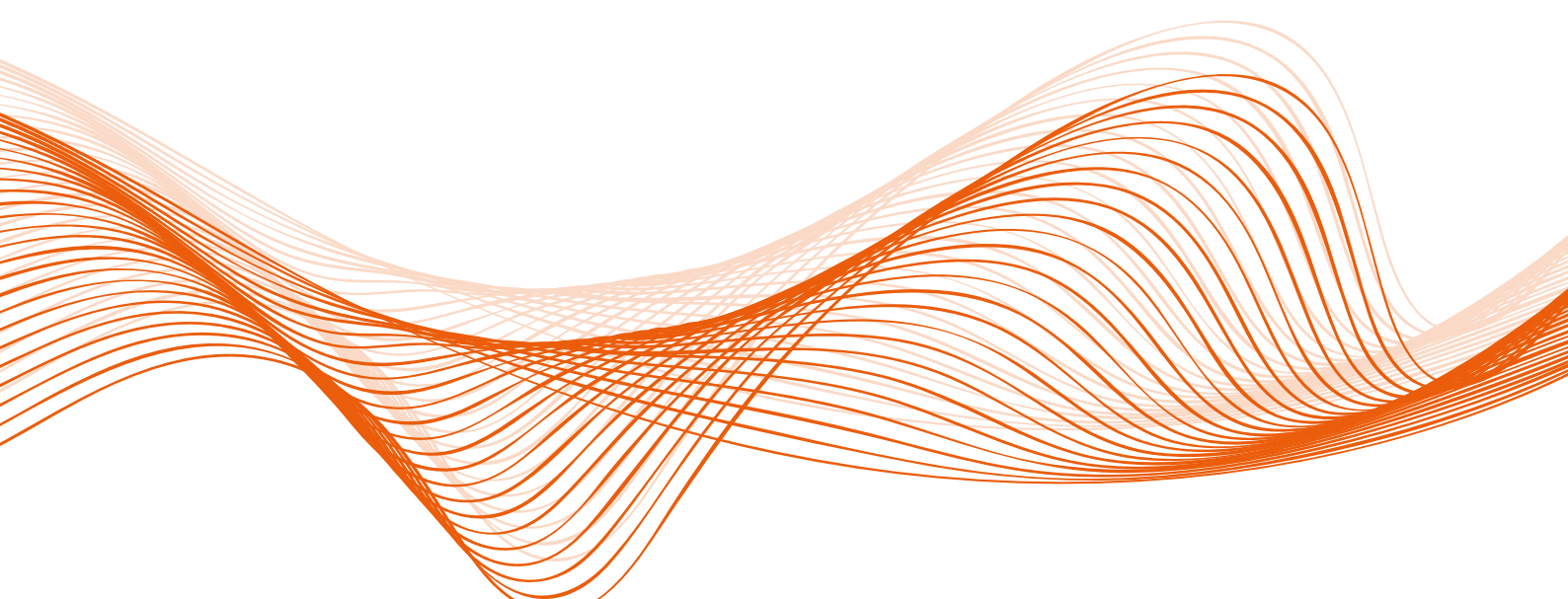
- a. Understanding Industry Demand and Needs**
- b. Working with Education and Training Providers to align with industry needs**
- c. Promoting cyber security careers, pathways and diversity.**

There is an increasing demand for cyber security roles in Ireland and the potential to grow sector employment by 10,000 to 2030. Recruitment, skills and retention issues have been the top challenge for the cyber security industry for the past 4 years since Cyber Ireland was established in 2019. How we meet this demand given the existing skills shortages and skills gaps will be central in making Ireland a leader for cyber security talent globally.

Cyber Ireland will support research on current and future industry demand (skills shortages and skills gaps) and supply in the market to understand the workforce gap. It will consider cyber security skills as well as the broader skills required to support the sector's growth.

We will work with the education and training providers to ensure current courses meet demand and suitability, as well as assess the need for new courses to meet industry demand and continuous professional development (CPD) needs.

To attract more people into cyber security we must make it an attractive profession, supporting a diverse workforce for all genders and backgrounds. We must make cyber security accessible with clear pathways and progression, while inspiring the next generation to consider a career in cyber security.



## 4. Advocate & Promote

**Goal: To be the collective voice of the cyber security sector, advocating for our member needs and championing the sector through partnerships with private and public stakeholders.**

### **Initiatives:**

- a. Representing the Sector**
- b. Providing Industry Research and Reports**
- c. Promoting the Sector**

Cyber Ireland coordinates the cyber security sector in Ireland and is best placed to understand the needs and challenges of industry to drive sector growth.

We will conduct and commission research in areas of importance for members, to better understand the needs, challenges and opportunities of the sector.

We will promote and champion the importance of the cyber security sector to our economy, society and national security, while positioning Ireland internationally as a cyber security leader.

We will work with our key partners in the private and public sector, aligned with our goals, to address the needs and support the growth of the sector.

