CyberSecurity as a National Security and Economic Strategy

Ireland's playbook for resilience, growth and international relevance

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Objectives

- Explain from an industry perspective the context, drivers and approach shifting Ireland's Cybersecurity from immature towards optimised.

- Share lessons learned

Ekco is a leading security-first cloud provider.

What makes us Different

We're the proactive specialists that help you push boundaries, who feel like part of your team, who transform your cloud and security journey

We've built close, transformative partnerships with hundreds of customers across Europe and the Caribbean, through friendly, personalised support and hands-on management.

We act as an extension of your team; we believe in transparency and collaboration to jointly achieve objectives.

2,000+	1000+	300+
Customers	Employees	Security Employees

HQ – Ireland	Caribbean	UK	Netherlands	New Locations
• Dublin	• Jamaica	• London	• Alkmaar	• Malaysia
• Waterford	• Bahamas	• Milton Keynes	• Rotterdam	• Slovakia
• Kildare	• Trinidad	• Birmingham	• Groningen	• Spain
• Cork		• Bournemouth	• Veenendaal	• Boston
				• Cape Town

EKCO

OUR SERVICES

EKCO MSP

Ekco Cloud

Cloud & Infrastructure

Business Continuity

Data

Networking

Workspace Services

Ekco Security

Governance & Compliance

Information Protection

Security Testing

Application Security & AI

Crisis Management
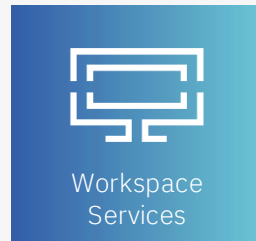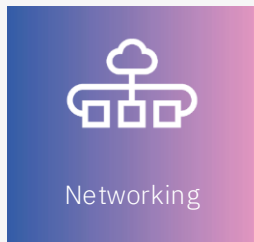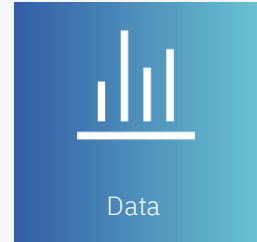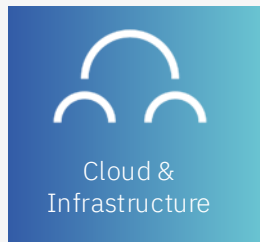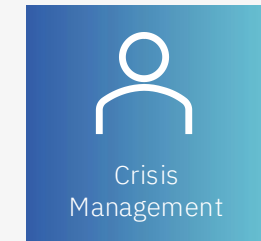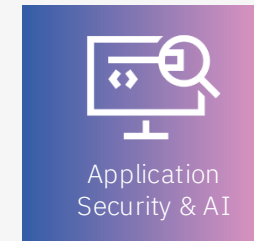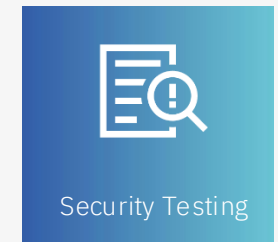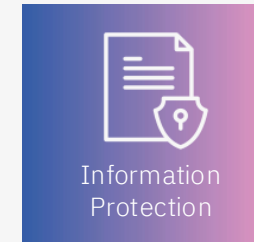
Managed Services

Caribbean Presence – 15 Years

Cybercrime as an economy

Global cost of Cybercrime

+15% p/a

$10.5 Tn

$6 Tn

2021   2026
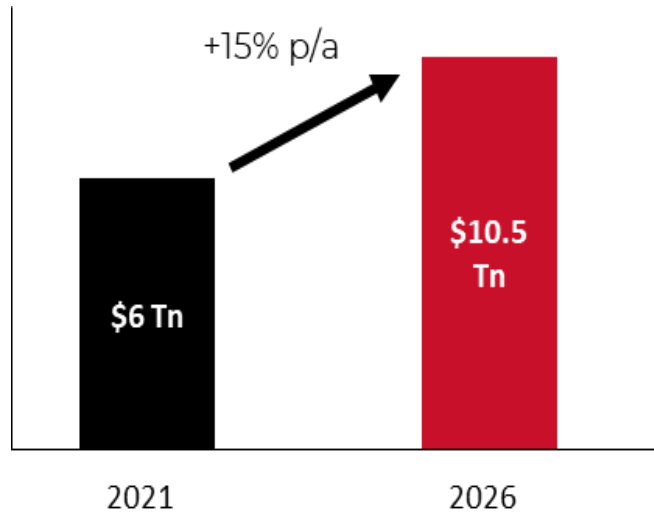
Source: Cybersecurity Ventures

Top 3 Economies Globally

1 USA

2 China
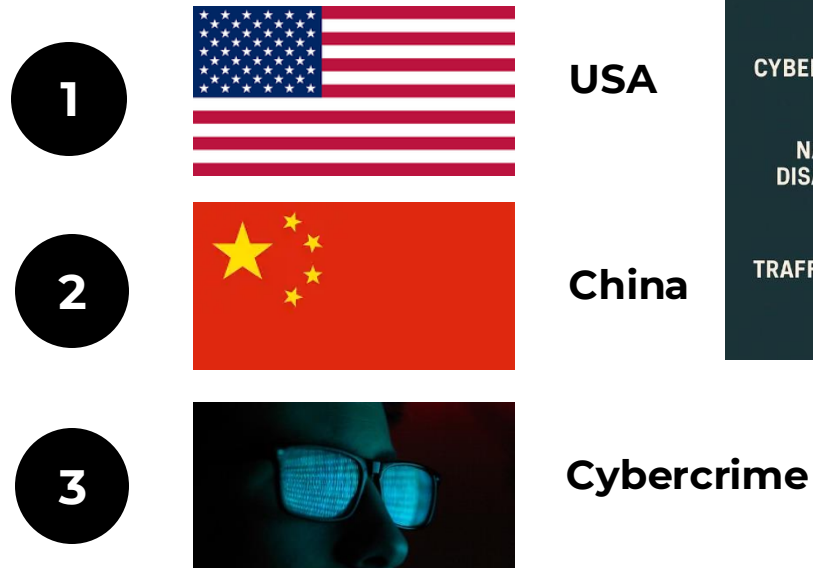
3 Cybercrime

Top of the big ticket costs

CYBERCRIME $10.5 TRILLION

NATURAL DISASTERS

DRUG TRAFFICKING

0   2.5   50   7.5   10   15   10
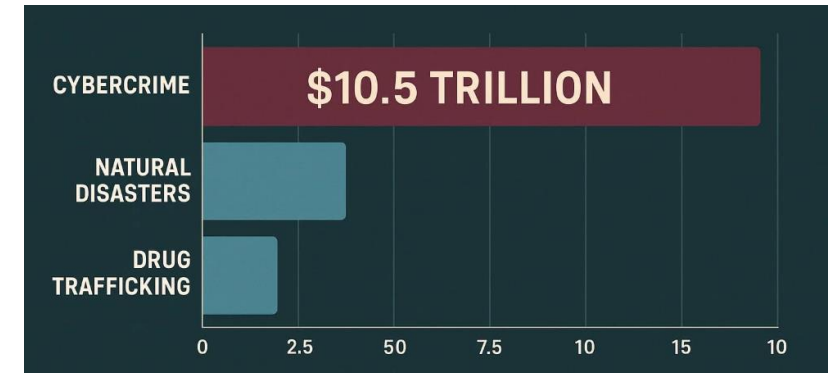
Probably one of the greatest wealth transfers in history?

Relentless cybercrime growth will continue
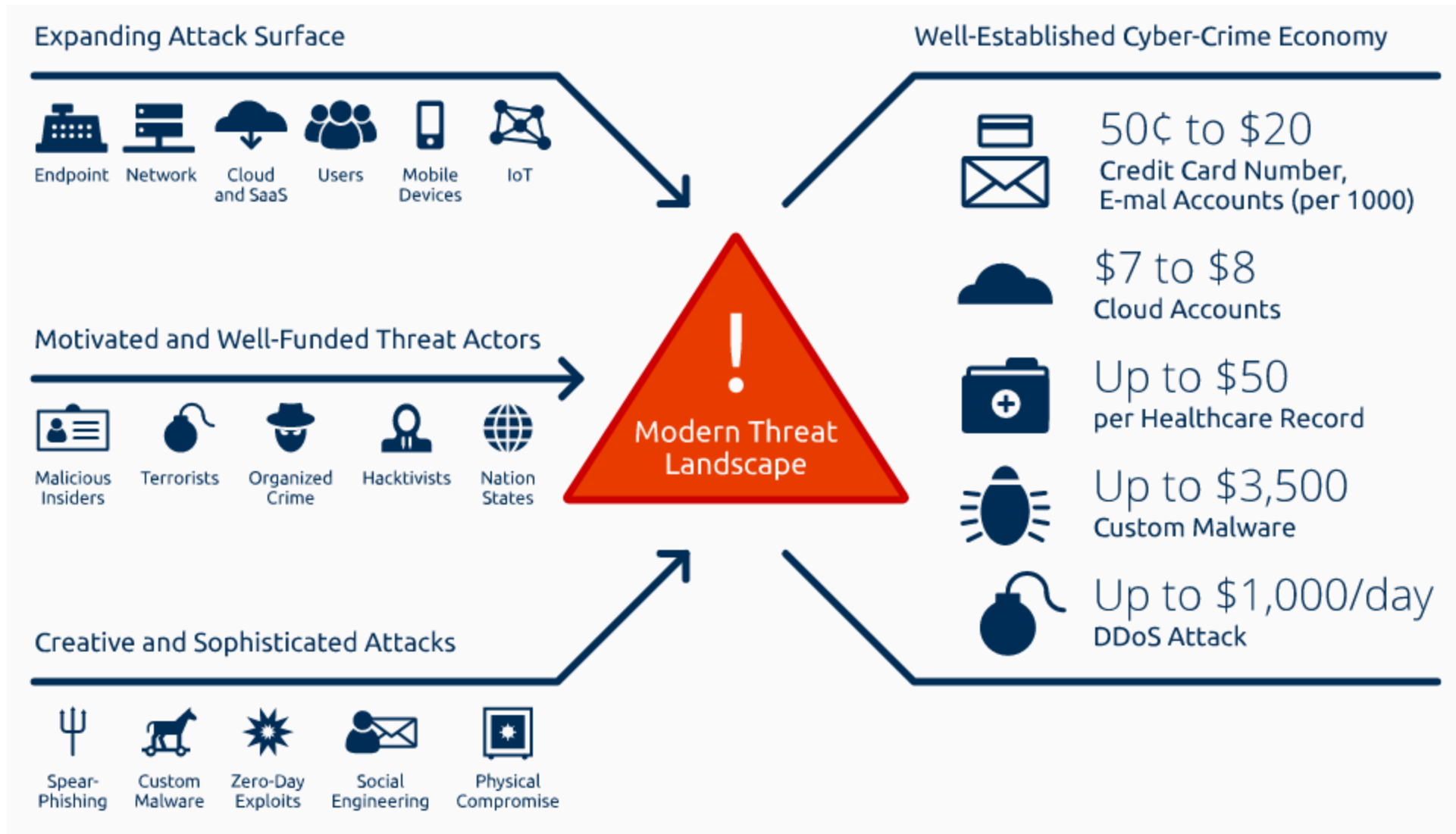
Ireland is a heavily FDI-driven digital economy
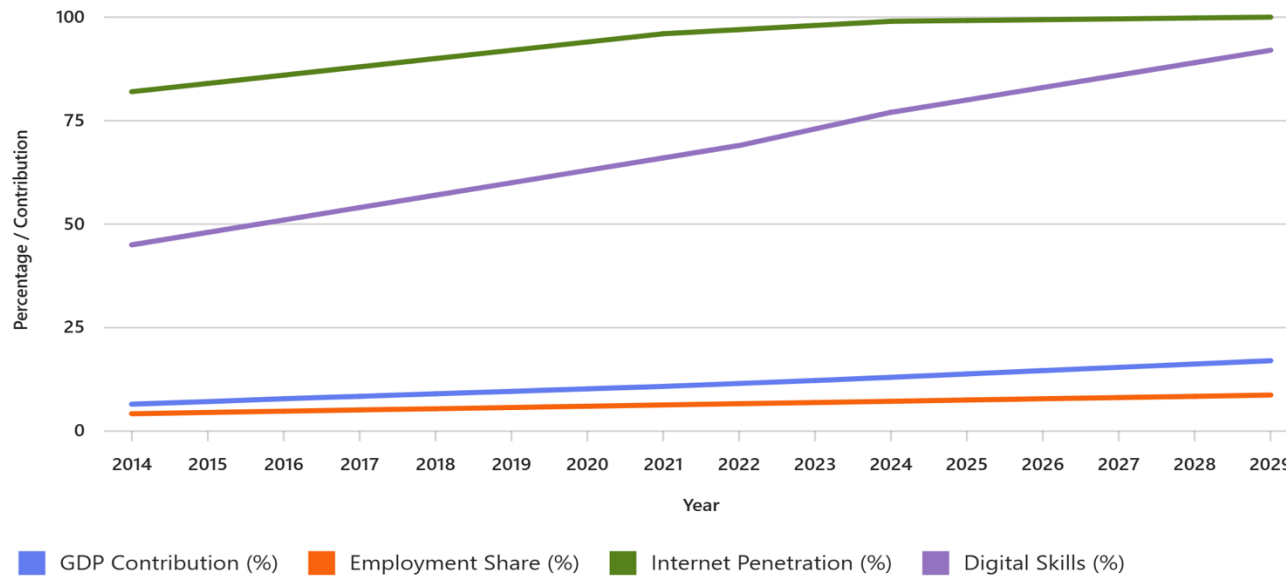
An EU member since 1973

Top 10 in OECD Digital Government Index

2023 Ireland's FDI stats
- FDI stock was €1,300 billion - €896BN from US
- €44BN greenfield, 248 new projects – 19,000 new jobs

- Non-digital sectors undergoing digital transformation

- Militarily neutral since 1939 but rank very low in Defence & National Security

GCI assesses national capability & commitment

Global Cybersecurity Index 2024

5 pillars for measuring the commitment of countries to cybersecurity

Legal	Technical	Organizational	Capacity Development	Cooperation
Measuring the existence of legal laws and regulations dealing with cybersecurity and cybercrime	Measuring the existence of technical institutions and frameworks dealing with cybersecurity endorsed or created by the country	Measuring the existence of institutions and strategies organizing cybersecurity development at the national level	Measuring the existence of cyber awareness efforts, schooling, trainings, and support for a cybersecurity industry	Measuring partnerships between agencies, firms and countries

Source: ITU, *Global Cybersecurity Index 2024*

ITU

Ireland's journey from immature to improving..
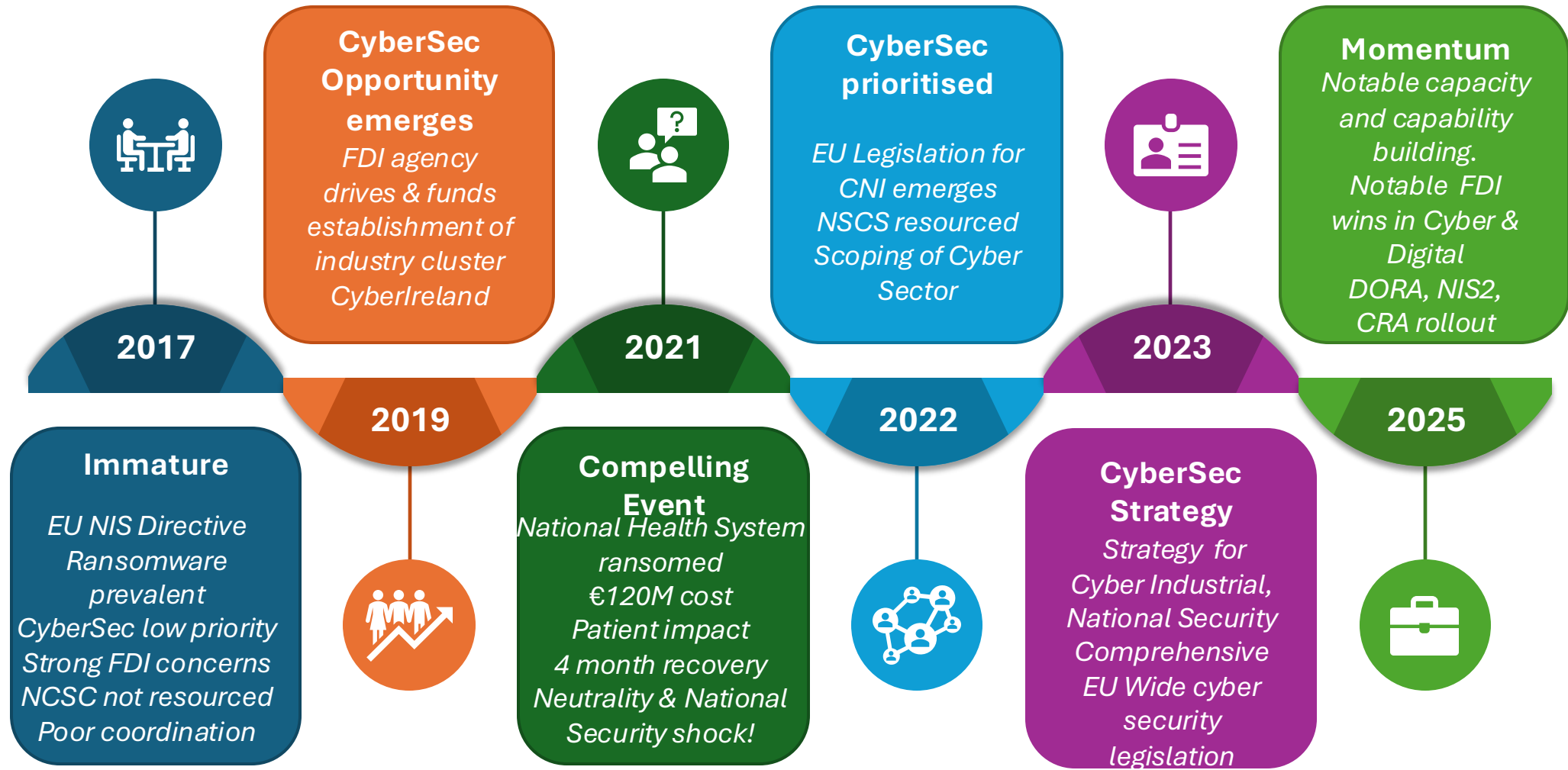
Drive commitment with sticks & carrots..

European Union's Cybersecurity Legislative Framework

- NIS Directive 2016
  - Cybersecurity Act 2019 — Regulation 2019/881
  - EU Cybersecurity Strategy 2020
    - Cyber Resilience Act 2024 — Expected 2024
    - NIS Directive 2022 — Directive 2022/2555
    - Proposed Cyber Solidarity Act 2024 — Expected 2024
  - Competence Centre and Network of National Cyber — Regulation 2021/887
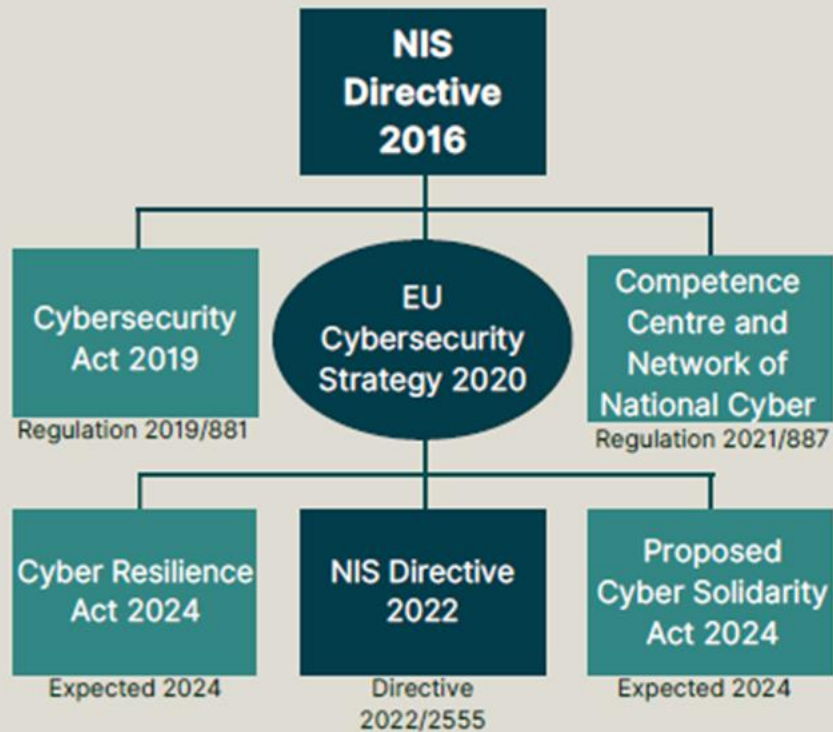
DECC (2024), Cyber Industrial Strategy Public Consultation

EU Market:
€52bn: 2023
€87.5bn: 2029
10.8% CAGR

+

NIS2 Growth:
+€10bn (+19%)
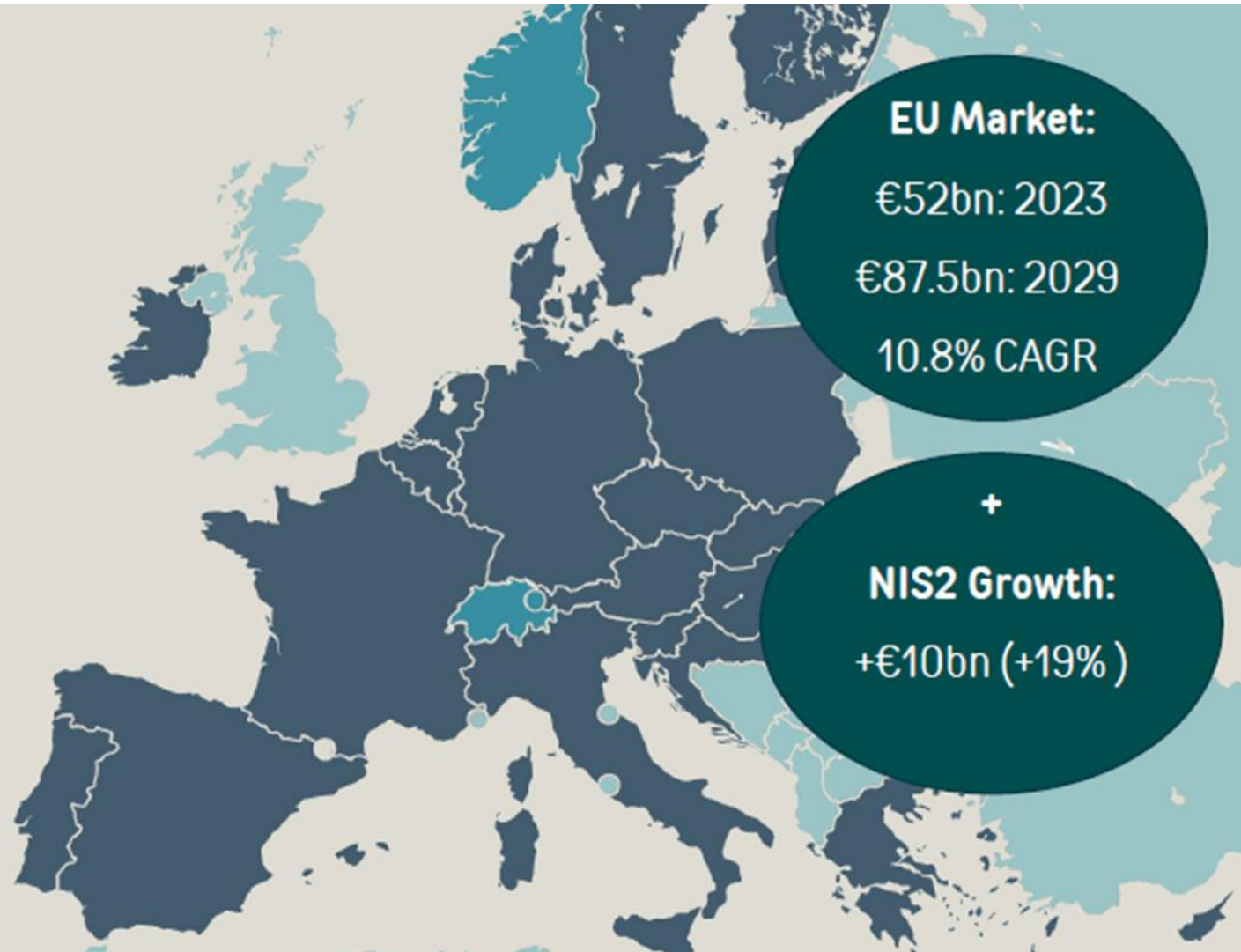
EU CYBERSECURITY ECOSYSTEM

COORDINATION THROUGH THE NEW JOINT CYBER UNIT

	RESILIENCE	LAW ENFORCEMENT	CYBER DEFENCE	CYBER DIPLOMACY
PROTECTING AND SUPPORTING EUROPEAN UNION CITIZENS	European Union Agency for Cybersecurity (ENISA) National Computer Security Incident Response Teams (CSIRTs) Cybersecurity National Authorities	Law Enforcement Agencies Europol (European Cybercrime Centre)	Ministries of Defence European Defence Agency (EDA)	Ministries of Foreign Affairs Diplomacy Toolbox
			European External Action Service (EEAS)	
	European Commission			
PROTECTING EU INSTITUTIONS, BODIES AND AGENCIES	Computer Emergency Response Team for The EU Institutions, Bodies and Agencies (CERT–EU) Security Operation Centres (SOC)			
COORDINATING NETWORKS, MECHANISMS AND SUPPORTING PROGRAMMES	Cyber Crisis Liaison Organisation Network (CyCLONe) Cooperation Group on Security of Network and Information Systems (NIS) Horizontal Working Party on Cyber Issues Computer Security Incident Response Teams Cybersecurity National Authorities	EU Law Enforcement Emergency Response Protocol (EU LE ERP)	Permanent Structured Cooperation (PESCO) European Defence Fund	European External Action Service (EEAS)

EUROPEAN CYBERSECURITY COMPETENCE CENTRE AND NETWORK

Focus Areas

Cyber Ireland connects the cybersecurity sector in Ireland to drive business growth through: collaboration, talent development and innovation.

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 cybersecurity careers, pathways and diversity

Drive Business Growth
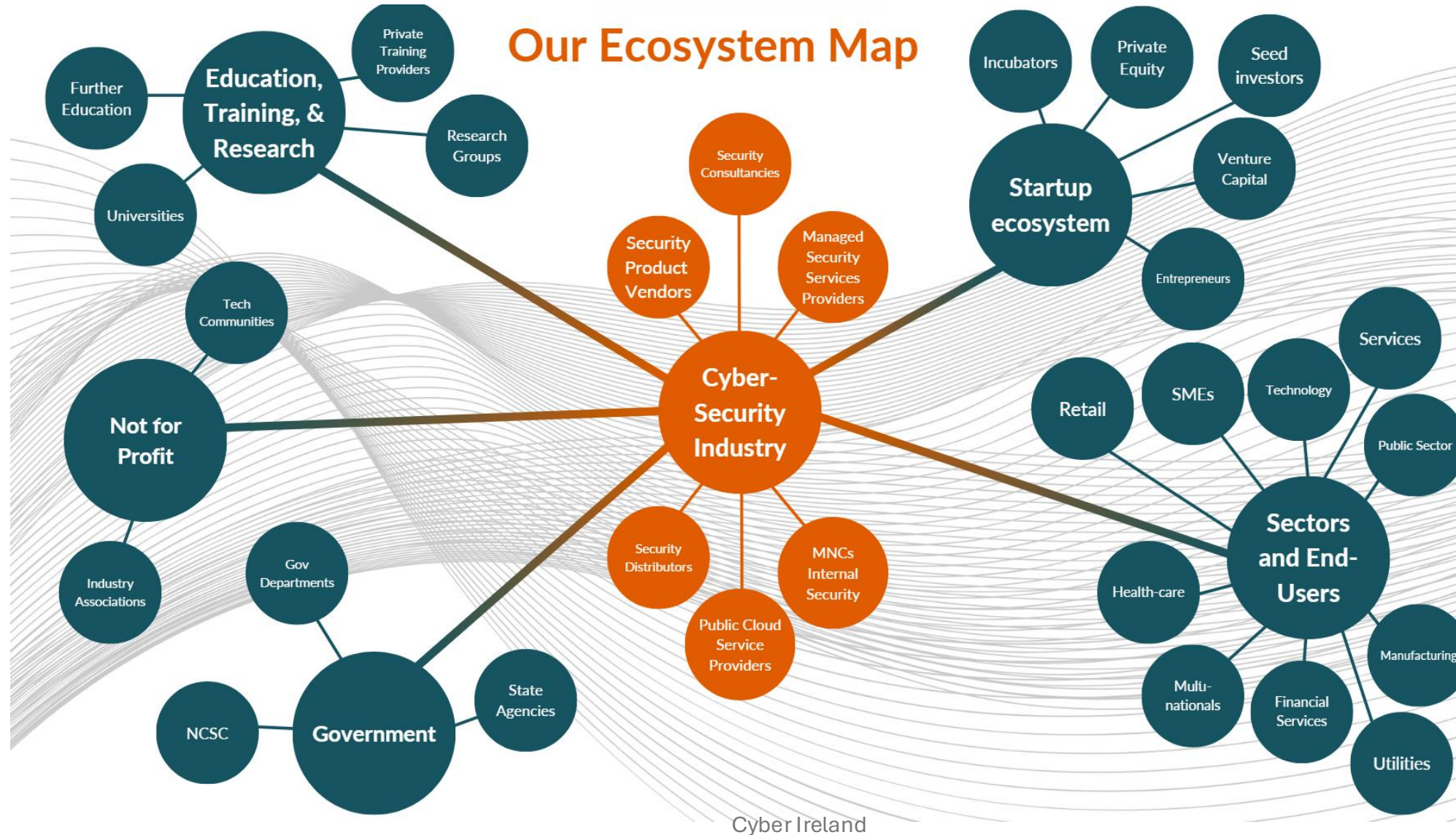
a. Supporting Business Growth

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

Industry and Government partnership

Our Ecosystem Map

Cyber-Security Industry

Security Consultancies, Security Product Vendors, Managed Security Services Providers, Security Distributors, MNCs Internal Security, Public Cloud Service Providers

Education, Training, & Research

Further Education, Private Training Providers, Research Groups, Universities, Tech Communities

Startup ecosystem

Incubators, Private Equity, Seed investors, Venture Capital, Entrepreneurs

Not for Profit

Industry Associations

Government

Gov Departments, State Agencies, NCSC

Sectors and End-Users

Services, Technology, Public Sector, SMEs, Retail, Health-care, Multi-nationals, Financial Services, Manufacturing, Utilities

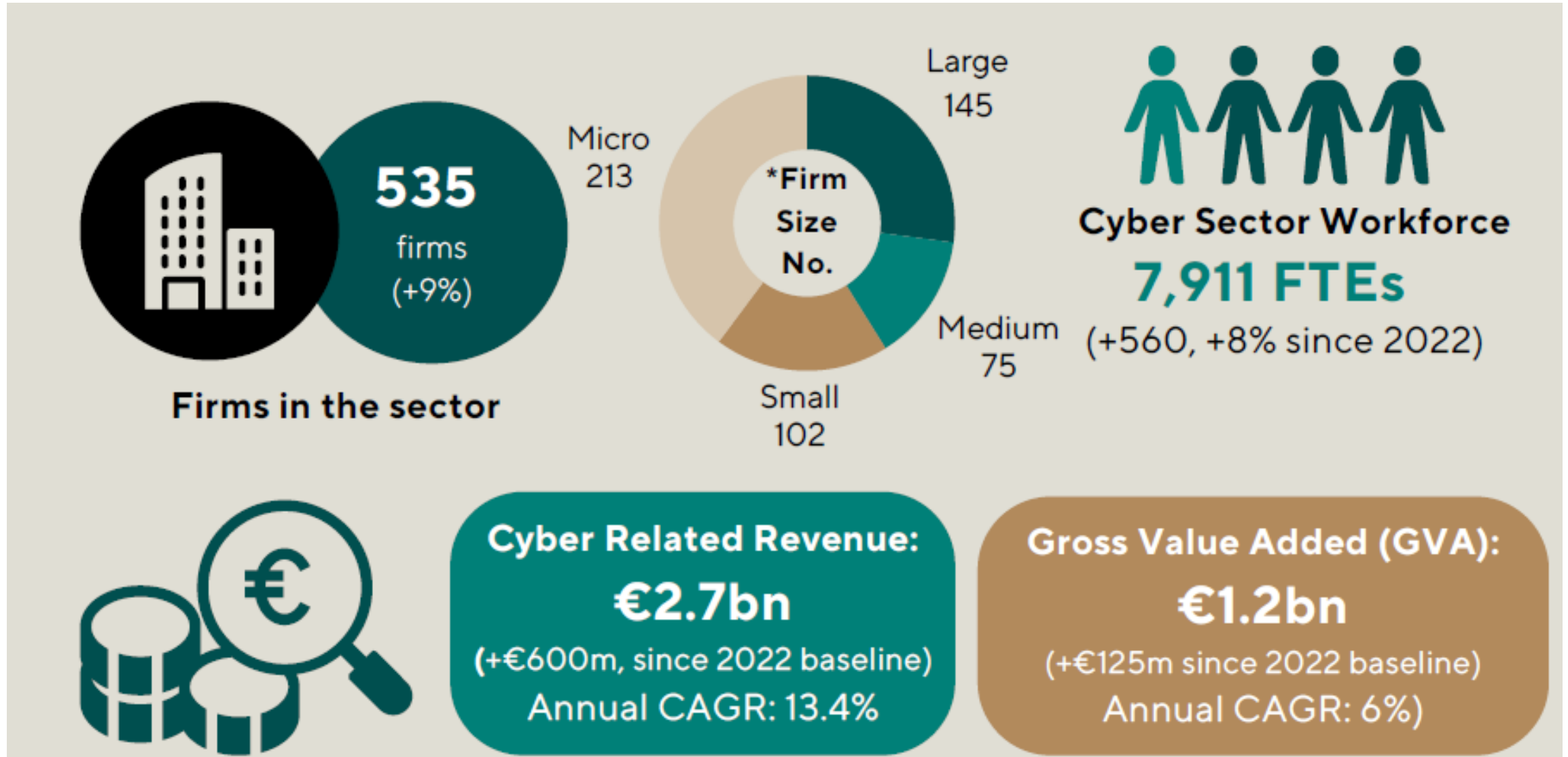Cyber Ireland

Build a strategy for National and Organisational Operational Resilience

Funding cybersecurity is nationally profitable

535 firms (+9%)

Firms in the sector

*Firm Size No.

- Large 145
- Micro 213
- Medium 75
- Small 102

Cyber Sector Workforce
7,911 FTEs
(+560, +8% since 2022)

Cyber Related Revenue:
€2.7bn
(+€600m, since 2022 baseline)
Annual CAGR: 13.4%

Gross Value Added (GVA):
€1.2bn
(+€125m since 2022 baseline)
Annual CAGR: 6%)

The Future

17,000 jobs   €2.5bn GVA

Strong Sector Revenue Growth: +13% CAGR

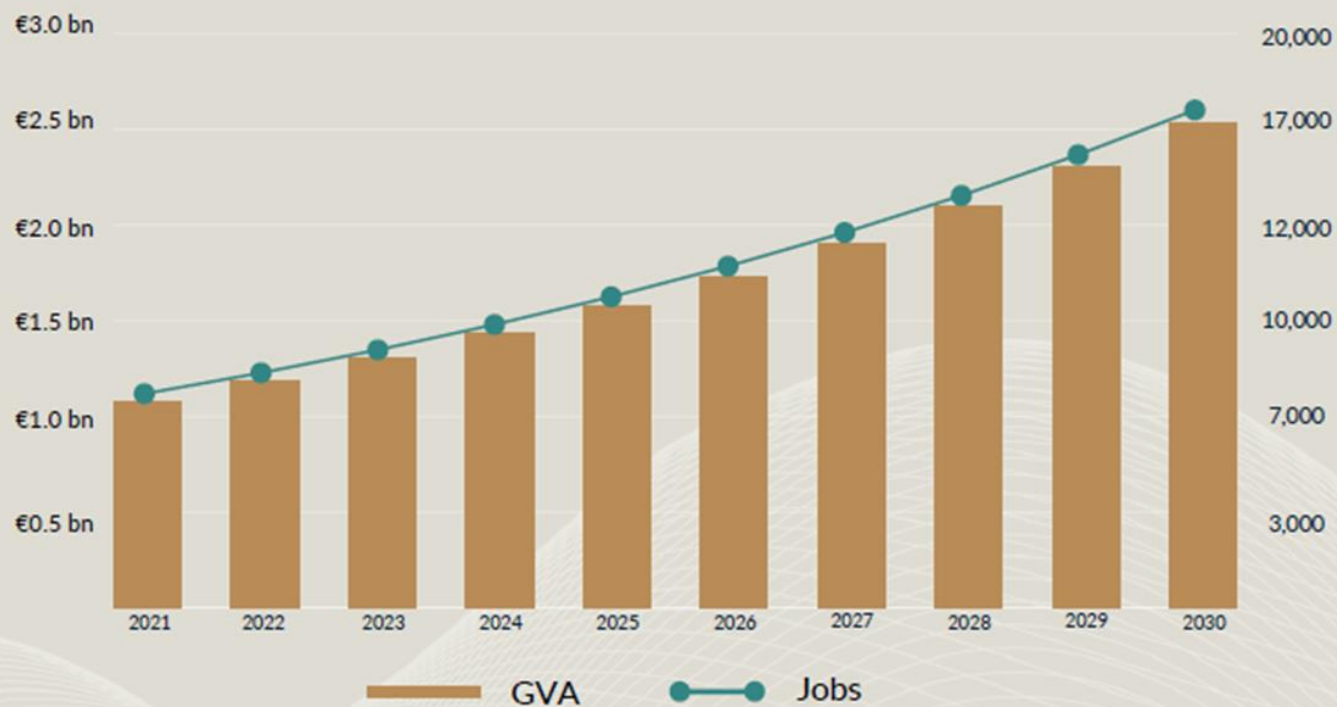Amid a tighter labour market and softening demand: +4% per employment growth

	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030

GVA   Jobs

Thank you