Global Cybersecurity Market Opportunity

Global Cost of Cyber Crime = $6TN
Cost per breach = $3.6M
Cost per record = $141

Global Market Opportunity
2018 = $124BN*
2023 = $300BN
CAGR ~ 12%*
*Gartner

Irish Market
Services €147M
Products €232M
Internal €83M
Total €462M
CAGR ~12%

Global Market Share Opportunity
1% = $3BN
1% = 36,000 jobs
= €900M payroll

Cyber Security Capital of Europe!
Why Cyber Security? To Enable

Our SMEs
- 98% Irish firms
- 50% private workforce
- 30% sell online (#2 EU)
- 17% sell online cross border (#1 EU)

Our DIGITALLY INTENSIVE SECTORS
- 212,000 workers
- €30 Bn GVA
- 26% of our exports
- 46 data centres (€7Bn since 2010)
- 6,500 in cyber sector*

Our DIGITAL FRONTRUNNER STATUS
- #7 and D9 country in EU

Our ASSETS, (In)Tangible
- CNI (~70)
- IP

Our DIGITAL OPPORTUNITY
- +€27 Bn and 140,000 net jobs to economy

*Sources: Ibec, Technology Ireland, BCG, IDA, DCCAE and European Commission.
Why Ireland for Cyber Security?
Cyber Security Ecosystem – MNCs – not a blank sheet
Rollout of major cyber skills training initiative (CSI) 2018-2021
+ 5,000 additional people trained in cyber security skills
+ Helping 4,000 companies to address the cyber security skills gap
+ Industry-driven modules in Network security, Cloud security, Application security, BCM, Penetration testing and Malware
+ Cyber security Bachelors and Masters Degrees

Cyber Security embedded in education system with:
+ 4 undergraduate degree courses in cyber security
+ 16 postgraduate degree courses with modules in cyber security
+ 8 postgraduate degree courses in cyber security
Cyber Ireland Development Timeline

**April 2017** – Industry Forum in CIT to address key challenges for the sector

**February 2019** – Stakeholder Engagement: 3 Cluster Workshops

**November 2018** – IDA seed investment & Launch of Initiative

**May 2019** – Official Launch of Cluster Organisation, with Strategy & Board
Our Objectives:

- Addressing Talent & Skills Needs
- Enhancing RD&I
- Networking & Collaboration
- Promotion & Branding
- Liaise with Government
- International Focus
Cluster Board - Industry

Paul Walsh (Chair)
VP Engineering Services, McAfee

Jacky Fox (Vice-Chair)
MD& Security Lead
Accenture

David Coffey
VP of Engineering, Enterprise Security
Forcepoint

Pat Larkin
CEO
Ward Solutions

Carmel Sommers
Technology for Good Manager
IBM

Joanne O’Connor
Cyber Security Training &
Education Officer, HPE

Shane Walsh
Ireland Country Head,
JRI America

Paul Ryan
Senior Director Engineering
Operations, Qualcomm
Talent & Skills - Cyber Ireland Career Portal

Online Dashboard will Comprise 3 Sections:

1. Mapping all courses in Ireland for a Career in Cyber

2. NICE Career Framework – Information on 52 Cyber Security Roles

3. Job Posting Forum For Cyber Security Jobs
Objective – To support cross-sectoral Research & Development in the cyber security domain

• Cyber Security R&D Landscape Study Launched – Industry & Academia
  • To provide the state-of-the-art perspective on current cyber research activity in Ireland.
  • Are you conducting R&D?
  • Take the survey at: https://www.surveymonkey.com/r/MLWYZV2

• Cyber Security R&D Landscape Workshop/Event
  • Results presented at a workshop to bring together experts and researchers from industry and academia to discuss and promote a common understanding of how research can support innovation in the cyber domain.

• Engage with national funding bodies on R&D Supports

• Support EU R&D collaboration/opportunities for members through delivering an EU funding awareness raising workshop & establish Cybersecurity EU R&D Working Group
Networking & Collaboration

1. National promotion of cyber security cluster & expertise

2. Three Regional Cyber Ireland Chapters to organise local events

3. Organisation of a national cyber security conference

4. Supporting existing Cyber Security Conferences
Internationalisation

Promoting Ireland as a leading location for Cyber Security

1. Connect with international Cyber Security Organisations & Clusters
   1. Northern Europe Cyber Clusters
   2. Member of Global EPIC
   3. Study Visit to Midlands Cyber UK

2. Support Irish cyber security SMEs to internationalise.
   1. Map SMEs Sector & Competencies
   2. Soft-Landing Initiatives in Target Regions
   3. Funding & Innovation Supports

3. Support a Cyber Security start-up eco-system
   1. Financing for start-ups
   2. MNC & start-up Matchmaking
What does success look like?

Challenges

• Changing Mindset
• Different needs & goals of Members
• Role of the Cluster
• Short-term vs Long-term
  • Initiatives
  • Funding
How to get involved:

• Stay up to date on Cyber Ireland activities and news by Signing-up to the Newsletter
• Become a Member of Cyber Ireland
• Web: www.CyberIreland.ie
• @CyberIreland

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