

PARTNERSHIP FOR PROGRESS

DIGITAL INFRASTRUCTURE IRELAND
2026 – 2028 STRATEGY



THE DIGITAL INFRASTRUCTURE INDUSTRY HAS NOT ONLY UNDERPINNED OUR PROSPERITY BUT HAS SPARKED INNOVATION, CREATED OPPORTUNITY, AND CONNECTED IRELAND TO THE WORLD'S MOST DYNAMIC MARKETS.

Garry Connolly
Founder, Digital Infrastructure Ireland

FOREWORD

Ireland's relationship with data and digital infrastructure is an enduring tale of economic success. For decades, data in all its forms, from mainframes and software to floppy discs and fibre, has been a powerful driver of Ireland's economy. ICT and related services contribute €228 billion annually and account for nearly 60% of our service exports. The digital infrastructure industry has not only underpinned our prosperity but has sparked innovation, created opportunity, and connected Ireland to the world's most dynamic markets.

We are now at a critical moment. The race to deliver AI-ready infrastructure is accelerating, and billions of euros are being invested in every region of the world. Energy grid constraints, sustainability pressures, and growing competition mean Ireland's once-assured position with "first right of refusal" for data centre projects can no longer be taken for granted. Ireland risks being permanently bypassed as other regions step up.

But there is also a uniquely Irish story that needs to be told. For the last 10 years, the Irish digital infrastructure ecosystem has proven its ability to deliver world-class expertise, innovative services, and high-quality products into global data centre markets. From engineering consultancy to software design and hardware manufacturing, Irish firms have played instrumental roles in landmark projects across Europe, North America, the Middle East, and Asia-Pacific. The ecosystem is creative, brave and relentless. It fuels investment, builds skills, and creates opportunities at home. In other words, the ecosystem ensures that Irish talent remains at the forefront of a transformation that is shaping industries worldwide, even when Ireland itself risks being left behind.

Digital Infrastructure Ireland proudly embraces our role as the collective voice for the Irish digital infrastructure ecosystem. We are a strong, robust partner-driven organisation that represents the diverse sectors, sub-sectors, and communities that drive the industry. For more than a decade, our ecosystem has flourished through a spirit of co-opetition and collaboration, laying the foundations of Ireland's status as a global centre of excellence in digital infrastructure.

Our vision moving forward is clear, yet ambitious. We want Ireland to reclaim its status as a premier destination for global digital infrastructure projects and strengthen the Irish digital infrastructure ecosystem's leadership as the trusted partner for designing, building, and supplying the infrastructure that powers Europe and beyond. Our 2026-2028 strategy outlines how we will deliver on this vision.

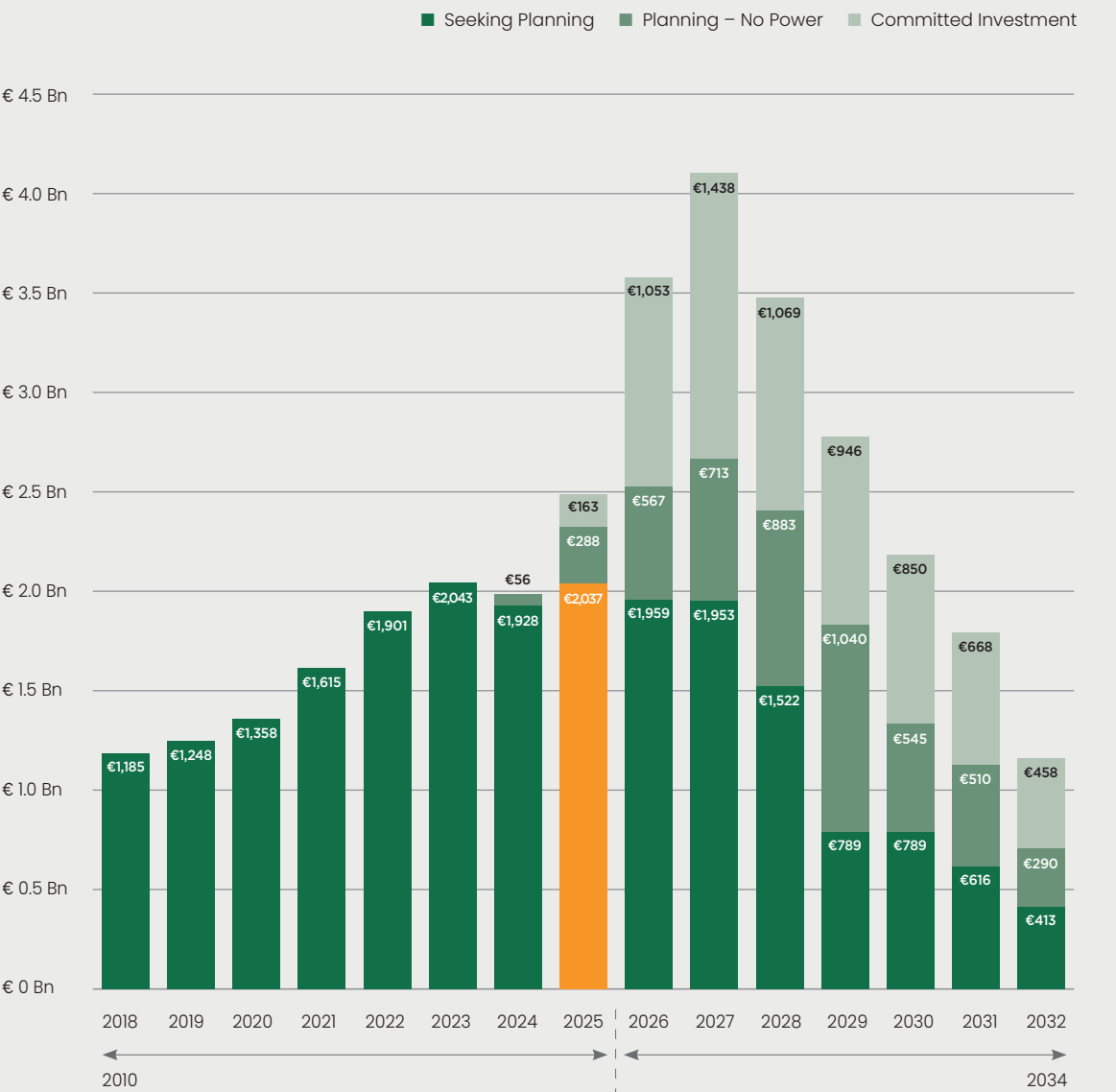
This strategy is the product of almost a year of dedication, insight, and collaboration. I would like to extend my sincere thanks to Maurice Mortell and Michelle Wallace for their 11 months of leadership as Co-Chairs of the Strategic Transition Advisory Board. Their commitment, guidance, and ability to bring people together have been instrumental in shaping the vision and priorities that underpin this 2026-2028 strategy.



Garry Connolly
Founder,
Digital Infrastructure Ireland

INVESTMENT TRACKING
CONSTRUCTION OF DATA CENTRES

This graph, provided by Bitpower, tracks the investment in the construction of data centres since 2017. The latest data reveals that policy and power uncertainty are forcing a slowdown in the expected pipeline of project delivery.



€18 billion
INVESTED TO DATE
2010 – 2025

€7.7 billion in Planning process
€5.6 billion with planning but no power
€8.2 billion in committed pipeline

SOURCE: BITPOWER RESEARCH AUGUST 2025

ABOUT DIGITAL
INFRASTRUCTURE IRELAND

Digital Infrastructure Ireland is dedicated to driving the growth and success of the digital infrastructure ecosystem both in and from Ireland.

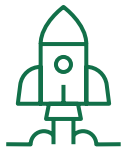
As a partner-driven organisation, our community of more than 80 partners brings together companies with world-class expertise at every stage of the digital infrastructure lifecycle. From design and construction to operation and maintenance, our partners embody a spirit of “co-opetition” and collaboration that strengthens Ireland’s standing as a global leader in digital infrastructure.

Digital Infrastructure Ireland serves as a collective voice for the digital infrastructure ecosystem to ensure it remains a trusted partner for designing, building, and supplying digital infrastructure across Europe and beyond.



OUR PURPOSE

Represent, support, and champion our partners to drive the growth and success of the digital infrastructure industry.



OUR MISSION

Deliver impactful change for the industry through advocacy, policy influence, education, research, and community building.



OUR VISION

Position Ireland as one of the premier destinations for global digital infrastructure projects and the trusted partner for designing, building, and supplying the infrastructure that powers Europe and beyond.

THE TRANSITIONAL ADVISORY BOARD

Digital Infrastructure Ireland embodies a spirit of co-opetition and collaboration. Our partner-driven structure has been created to proactively address the rapidly changing needs of the digital infrastructure industry.

The first order of business we undertook was the establishment of a transitional, strategic Advisory Board to guide our initial deliberations as an organisation. The insights gained from this collaboration have been invaluable, helping to shape both our current outlook and our forward-looking strategy.

FROM THIS PROCESS, TWO CLEAR PRIORITIES HAVE EMERGED:

- First, we must address the ongoing challenges in Ireland relating to new grid connections, the energy mix, aligned policy and legislation, the pace of implementation, and meeting our climate action goals.
- Second, we need to strengthen and expand our efforts in promoting the “from Ireland” story, ensuring our partners gain visibility and access to both existing and emerging markets for their services.

As part of this process, we also conducted an in-depth partner survey to gather insights from our partners. The results echo the Advisory Board’s sentiment towards change and new approaches to ensure Ireland, and the Irish, remain competitive and future-focused. Partners want Digital Infrastructure Ireland to evolve in a way that builds on past success while positioning Ireland for long-term leadership in digital infrastructure.

Thank you to our Advisory Board – Peter Lantry, Emma Fryer, Mark Flanagan, Niall Durham, Cathal Quinn and Colm Phelan for their time and support during this transitional period. We now lay the foundation for the next 24 months, with a newly structured organisation and clearly defined objectives that seek to preserve our DNA and culture while meeting the evolving demands and expectations of our partners.



Maurice Mortell and Michelle Wallace
Co-Chair Strategic Advisory Board





Maurice Mortell,
Digital Infrastructure Ireland



Michelle Wallace,
Digital Infrastructure Ireland



Garry Connolly,
Founder



Emma Fryer,
Cyrus One



Peter Lantry,
Equinix



Mark Flanagan,
Kirby Group



Cathal Quinn,
Moy Materials



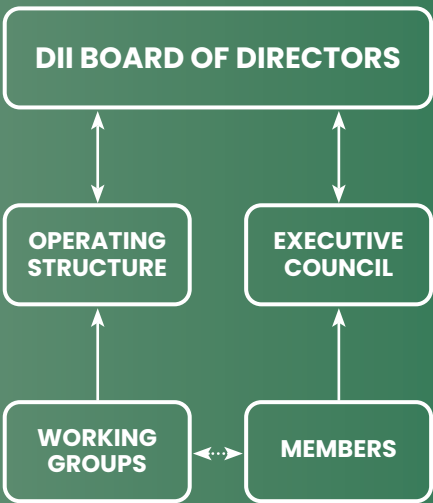
Colm Phelan,
DECI



Niall Durham,
Captured Carbon

DIGITAL INFRASTRUCTURE IRELAND'S NEW STRUCTURE

DII has transitioned from a Private Limited Company to a Company Limited by Guarantee (CLG) in June 2025. DII will operate with a strengthened governance model and partner-driven strategy.



ORGANISATIONAL STRUCTURE

- The Board of Directors is established and will expand strategically over the next two years to include broad member representation and the strategic skills required for the transition.
- The business will be organised around four core activities: Community, Events, Talent, and Policy.
- An Executive Council will guide operational priorities, supported by dedicated Workgroups for Talent and Policy, which will continue to evolve and expand as needed.

PARTNER ENGAGEMENT



- Develop a membership base to represent a wider ecosystem, and create greater value for members.
- Dedicated resource on member engagement to respond to member needs and industry changes.

EDUCATION & LEADERSHIP DEVELOPMENT



- Continue the Emerging Leaders programme to further expand leadership capability in the industry and establish a long-term, continuous network and learning platform for alumni.
- Develop a training and education portfolio by 2028, including funding for subsidised learning for members.

ADVOCACY & REPRESENTATION



- Digital Infrastructure Ireland will serve as a collective voice for the digital infrastructure ecosystem, representing the diverse sectors, sub-sectors, and communities that drive the industry.
- Establishment of a Policy & Research Council to advocate for the recognition of data centres as essential infrastructure, highlighting their economic contributions and societal importance.
- Representation on key European and international bodies such as EUDCA and CNDP.
- Engagement with essential Irish government, EU, and global stakeholders to ensure the success of digital infrastructure in Ireland now and into the future.



DIGITAL INFRASTRUCTURE IRELAND'S FOCUS FOR THE FUTURE

Digital Infrastructure Ireland's 2026 - 2028 strategy focuses on five strategic priorities to reinforce Ireland's leadership:

Building the Digital Ecosystem Community

At the heart of these priorities is our member community. This collaborative network, which has been in existence for over 11 years, embodies the spirit of 'co-opetition,' fueling the growth and resilience of the ecosystem in Ireland and beyond. Strengthening and empowering this community remains a central part of our strategy.

STRENGTHENING IRELAND'S DIGITAL INFRASTRUCTURE ECOSYSTEM

- Advocate for recognition of data centres and digital infrastructure as essential national infrastructure.
- Support policy alignment to enable continued investment in cloud, AI, and digital transformation.
- Develop a robust, sustainable, and resilient digital infrastructure roadmap.

SECURING COST COMPETITIVENESS & EASE OF DOING BUSINESS

- Advocate for competitive and predictable regulatory, energy, and tax environments.
- Support initiatives to address Ireland's energy constraints with practical, future-focused solutions.

ENHANCING INDUSTRY TALENT & SKILLS

- Expand leadership and skills programmes, including Emerging Leaders.
- Partner with training providers and funders to develop a training portfolio of free and fee-based programmes.

BUILDING INTERNATIONAL LINKAGES

- Promote Ireland as a centre for global expertise, supporting the export of services and know-how.
- Engage with EU and global policy forums, including EUDCA and Climate Neutral Data Centre Pact.

DRIVING SUSTAINABILITY & SOCIAL IMPACT

- Expand environmental initiatives like DCs for Bees, demonstrating leadership in biodiversity and sustainability.
- Advocate for industry-wide sustainability standards and practices.



DIGITAL INFRASTRUCTURE IRELAND'S OPERATING PRINCIPLES

We will continuously enhance the partner experience, innovate our offerings, and invest in a talented, diverse internal team. Our operations will be underpinned by robust governance, cost-consciousness, and a commitment to measurable impact.



LEARN
WE EMPOWER YOU
WITH KNOWLEDGE

Digital Infrastructure Ireland shares timely and accurate industry insights, so our partners can make informed decisions for their business. Together, this allows us to highlight our unique strengths and drive sustainable growth for a more resilient digital infrastructure ecosystem in and from Ireland.



AMPLIFY
WE CHAMPION
OUR PARTNERS

Digital Infrastructure Ireland showcases our partners to the broadest audience possible, bolstering credibility and elevating recognition of the ecosystem both in and from Ireland. The Irish digital infrastructure ecosystem is creative, brave and ambitious and we want the world to know it.



CONNECT
WE CREATE
CONNECTIONS

Digital Infrastructure Ireland brings competitors together in the spirit of co-opetition and solves industry challenges together. Connecting people and partners is the bedrock of a thriving and innovative Irish digital infrastructure ecosystem.



ELEVATE
WE PUSH THE
BOUNDARIES OF
WHAT IS POSSIBLE

At Digital Infrastructure Ireland, we believe each individual contributes to a ripple effect of change and in the power of the collective to address the big challenges facing us today. Together, we can do good and drive lasting change that shapes the future of the digital infrastructure industry and beyond.



DIGITAL INFRASTRUCTURE IRELAND ECOSYSTEM

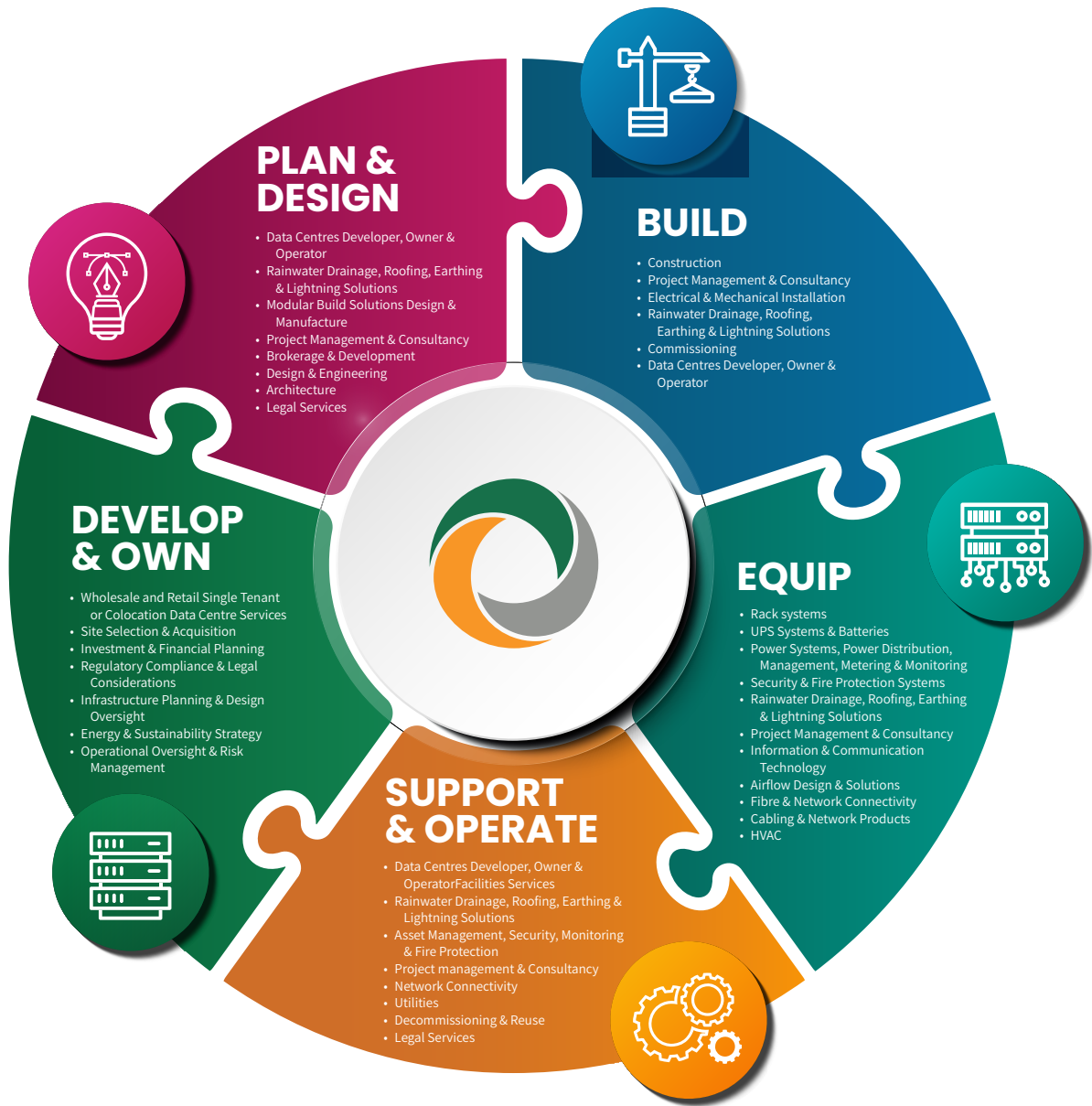
A rich and diverse set of companies is reflected in the breadth and depth of Digital Infrastructure Ireland’s partners.

Our partners are responsible for selecting, planning and design during the pre-construction phase of a data centre build. They are also actively involved in the build phase of construction of the base building and commissioning of a data centre.

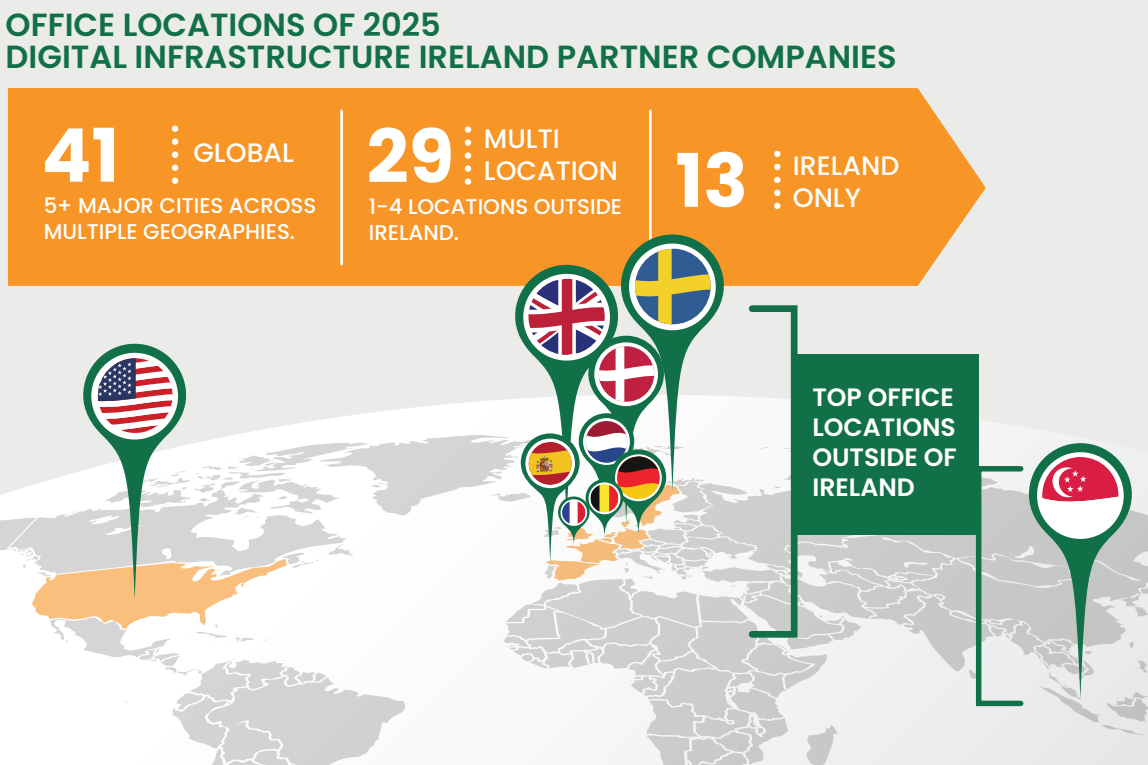
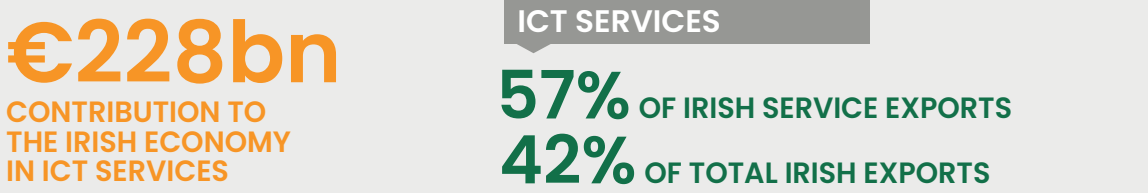
The largest cohort of Digital infrastructure Ireland partners equip data centres with the IT equipment, infrastructure, HVAC and other

operational systems as they move from the construction to the operational phase of the data centre.

Finally, our partners own and operate data centres and are responsible for the daily functioning of services to and for a data centre, as well as the raising of capital to refresh older data centres and the building of new ones.



DIGITAL INFRASTRUCTURE IRELAND IN NUMBERS





digitalinfrastructureireland.com



[@digitalinfrastructureireland](https://www.linkedin.com/company/digitalinfrastructureireland)



**European Data
Centre Association**

