WILLIAM FRY

in association with: amárach research

Global Trends in Technology & Data

An analysis of key factors driving business strategies

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Introduction

Across the world, we have all experienced transformative changes and events that will influence the way in which we live, work and engage with each other for years to come. As a major hub for many sectors, especially technology, life sciences and financial services, Ireland is in a very strong position to help shape global investment and other priorities.

In 2016 William Fry published the results of a study, *Europe for Big Data*, which concluded that companies across all industries have become, in effect, data organisations. We explored developing trends emerging from the global data revolution. It showed how companies have been actively pursuing and accelerating their investments in data driven strategies. While our report showed that approaches may differ, the business challenges and the opportunities involved clearly play a key role in decision making across all industries and sectors.

This, our latest report, looks beyond data and shows that we are truly part of a data culture; adopting fast-evolving radical new technologies that reflect the changing ways in which we now work and live our lives. In today's world, smart data analysis is, more than ever before, a key differentiator for businesses. We look at trends in how businesses are using data, what factors are affecting decision making and the extent to which new technologies are being deployed: 5G, artificial intelligence, machine learning, the internet of things and blockchain.

Our report is based on insights from a survey by Amárach research of over 300 C-suite executives from leading companies around the world.

Key findings

Top considerations when choosing a location

2021		2016	
Data-related regulatory issues	1st	Tax	1st
Talent	2nd	Ease of doing business	2nd
Legal framework	3rd	Legal framework	3rd

Digital culture

93% agree that investment in digital channels/ transformation are key to facilitating future strategy

Privacy regulation

89% feel greater EU wide coordination is essential

85% agree that concern over privacy and related issues is a key driver for locating discrete data operations in the EU

73% are increasing their investment in information security

AI/Technology investment

79% will invest significantly

Ireland as a preferred location

97% view Ireland as a favourable location for data-related investment

92% rate Ireland's data-related regulatory climate as 'good to excellent'

93% are considering data-related investments in Ireland in the next 18 months

89% rate Ireland as **'good to excellent'** for privacy regulation

According to the 2016 William Fry report, the most important drivers for international firms making decisions about where to locate data-related investments in the European Union (EU) (or investing in expansion in the EU) are: the data-related regulatory regime; access to talent; the legal framework of the jurisdiction; language and culture; political stability, and regulatory track record.

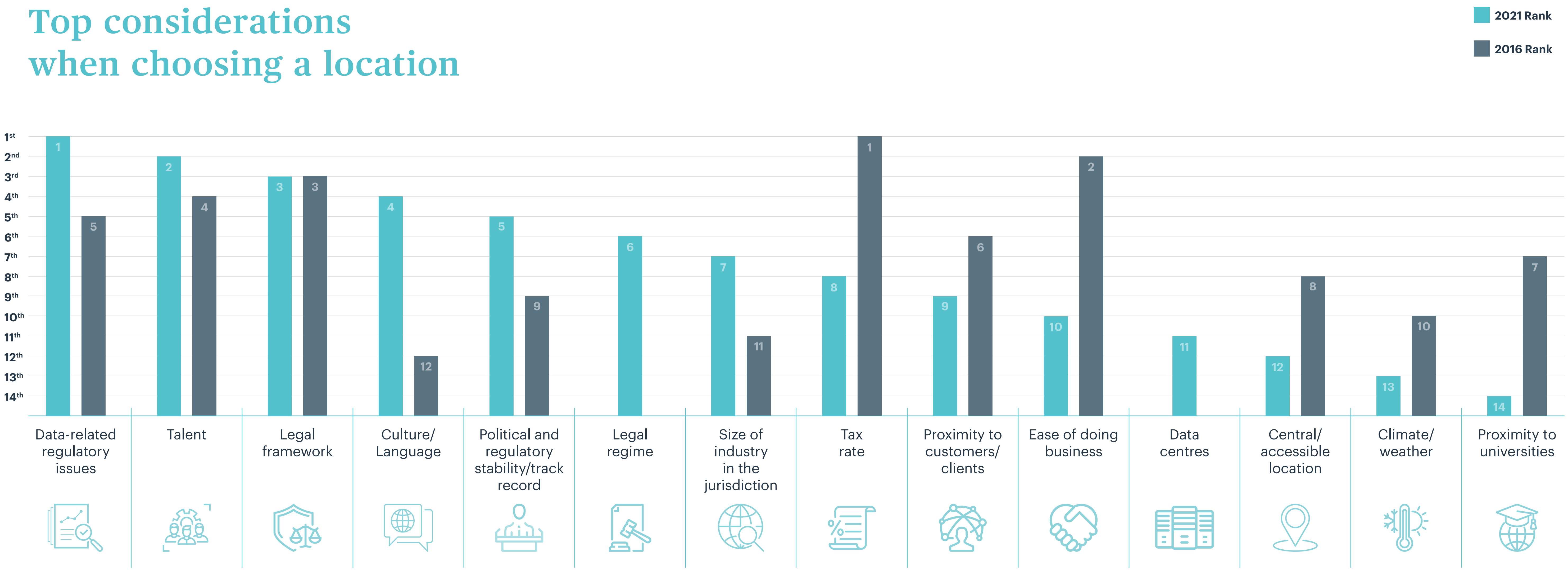
While these drivers were important factors in 2016, they have now become the top considerations. It is perhaps not surprising that **data-related regulatory issues** (including **ease of doing business in the EU**, and **appropriate data regulation**) have become the top driver for location decisions. This year's top drivers have replaced those of 2016, which were: tax rate (moving from number 1 to number 8); the ease of doing business (moving from 2 to 10); and the importance of a jurisdiction's legal framework (remaining at number 3). Companies headquartered in the US are significantly more likely than European firms to attach high importance to the legal framework in making such decisions.

Access to talent (which along with **technology** and **tax** are key factors for companies choosing Ireland as an EU location) ranked highly in 2016. Talent is now an even more important consideration for investment and expansion according to our report. The tax rate remains exceptionally important, though developments such as the UK's exit from the EU and the COVID-19 global pandemic impacted its immediate importance as a location driver.

Culture/Language has risen significantly in the rankings, up from 12th to 4th since 2016. European and US headquartered firms place a considerably higher emphasis on language than their Asian counterparts.

Talent has become even more important as a consideration for investment and expansion

Top considerations when choosing a location



If your company were to consider an EU location or a further or alternative EU location or an expansion of a current EU location, what are the most crtical considerations?

Key investment influencers

In the number one ranked data-related regulation consideration, Ireland was rated as good or excellent by 92% of participants; Ireland's legal regime received good or excellent ratings from 97%; and the ratings for language and culture (93%) and political and regulatory stability (90%) scored very highly.

There is also evidence of a significant and favourable shift in attitudes towards Ireland as a suitable location for data related location/ organisation/ investments since 2016. Ireland's score as an excellent data-related investment destination has increased significantly, from 45% to 59%. An impressive 97% of respondents deemed Ireland 'fair to excellent', placing the jurisdiction second (jointly with the Netherlands) in Europe in this regard, with Germany number one.

When asked how likely it is that their company will be making significant or further data-related investments in Ireland in the next 18 months, 62% of global C-suite executives said it was 'likely', with an additional 31% indicating that it was 'possible'. Even though globally and in the EU there has been significant disruption, it is very promising for Ireland's future inward investment community that 93% of companies are considering new data related investments in Ireland in the next 18 months.

The importance of digital culture

Our report in 2016, *Europe for Big Data*, confirmed that companies across all industries and sectors are data driven companies. Our research identified that these companies are increasingly relying on data to identify and implement commercial opportunities and generate competitive advantage. This widespread intention to engage in more strategic use of data is evidenced by the fact that 64% of the firms in our study agree strongly that they will use data and IT systems to future-proof their businesses against future pandemics.

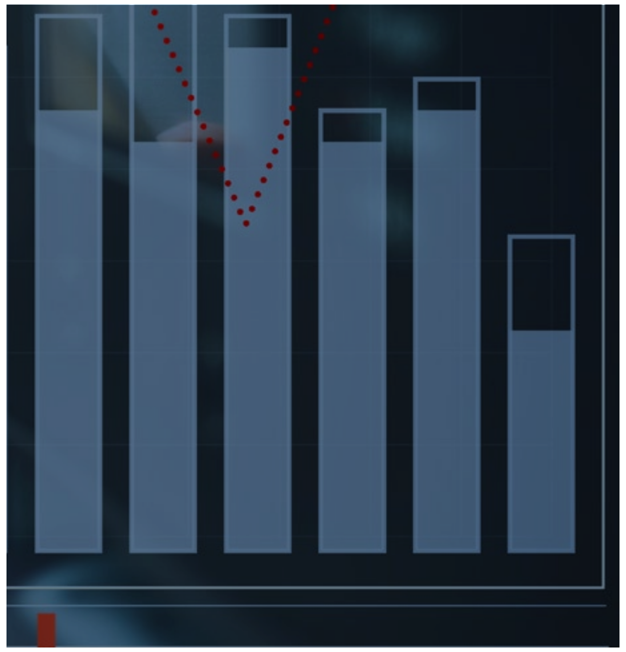
Critical to the success of data and analytics teams in driving digital and data strategies in an organisation is the presence of a digital or data-driven culture.

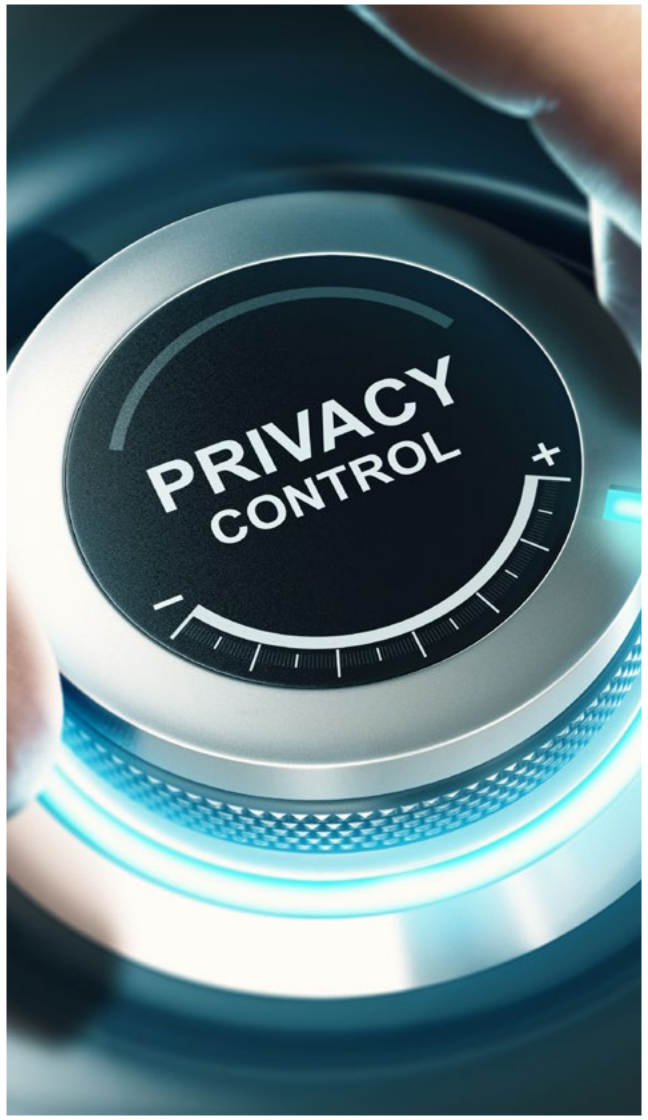
Digital or data-driven culture stimulates the use of technology and data to gain valuable insights and understand customer behaviour. It allows organisations to provide customized products and services and achieve improved efficiency in customer experience (CX).

Our report has found that there is widespread agreement among global C-suite decision makers regarding the need for future proofing through data and IT (93%), investment in flexible working capabilities (92%) and better use of big data capabilities (87%). The highest level of agreement regarding changes to future strategy was for investment in digital channels/transformation, with 93% agreeing that this was core to facilitating digital and data cultures and future strategy.

Regional hubs for regional strategy

Due to differing data regulation regimes across regions, many international organisations are deciding that their data decision making function, operations and strategies for each geographic region must be located within that same region. This has been a consistent factor since our 2016 report. What has changed though is the increased importance of data-related regulatory issues in coming to that decision. Data-related regulatory issues are ranked now as the number one issue when considering an EU location by organisations.

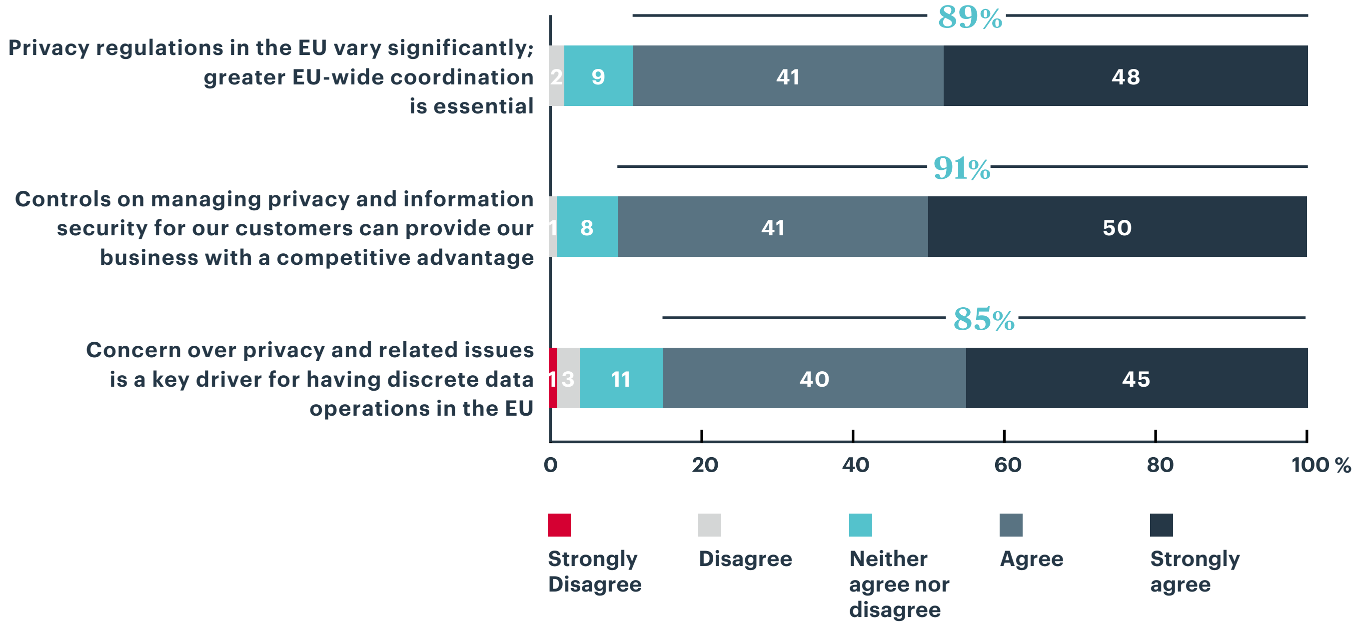




Data as the leading driver

When asked to name critical considerations for a European location, **14%** of participant organisations put data-related regulatory issues on top. To put this in context, just **5%** put the tax rate on top. The GDPR has had a positive impact on EU-based investments with **85%** of respondents (up from **81%** in 2016) noting that concern over the GDPR and related privacy issues was a key driver for having discrete data operations in the EU.

There is widespread agreement about privacy regulations and information security



How strongly do you agree or disagree with each statement?

EU data regime can deliver for business

In the years since our report in 2016, *Europe for Big Data*, significant legislative changes have happened in the data regulatory space. The GDPR and related EU data regime measures have had a significant impact on **89%** of companies' current and/or future EU investment plans.

While GDPR has been a challenge for companies and necessitated significant investment in change, the findings of our report reveal a broadly positive attitude towards it. In fact, 91% of C-suite executive decision makers agree that appropriate controls on managing privacy and information security for their customers can provide their businesses with a competitive advantage in the present climate. On the other hand, there is concern in relation to divergence in the implementation of GDPR in member states with **89%** of respondents agreeing that greater EU-wide coordination is essential. This was up from **61%** in 2016, two years before the GDPR became law across the EU on 25 May 2018.

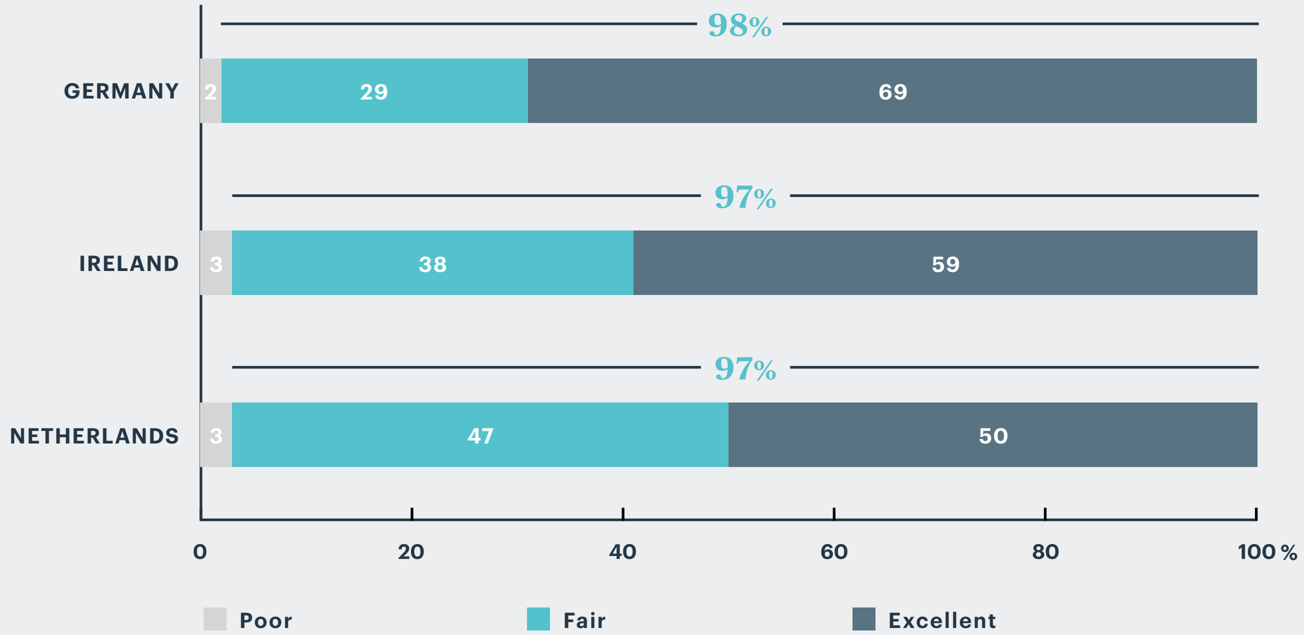
Ireland's data privacy regulatory regime is the gold standard

Ireland's data privacy regulatory regime is held in very high regard internationally with

89%

of respondents rating its data-related regulatory climate as good to excellent. Also of note is the fact that **46%** regard the regime as excellent.

Ireland still punching above its weight



How would you rate the following countries in terms of their suitability for data related location / organisation / investments?

Ireland as a place for doing business

Ireland is the sixth-best country globally to invest in and second-best on a per capita basis according to Site Selection. Its 'Global Best to Invest' rankings has Ireland in sixth place overall, behind the US, Canada, UK, Australia and Germany. On a per capita basis, it is in second place behind the US but ahead of Canada, Australia and the UK. In Western Europe, Ireland is in third place overall, behind the UK and Germany, and in first spot on a per capita basis.

Ireland has an outstanding track record for global inward investment. One third of multinationals in Ireland have had operations in the country for over 20 years, illustrating the longevity and commitment of these companies to Ireland. Ireland has been chosen as the base for EU HQs or significant operations by 9 of the top 10 US technology companies, all of the world's top 10 pharmaceutical companies, the top 5 global software companies, 14 of the top 15 medical technology companies, 8 of the top 10 industrial automation companies, and 8 of the top 10 financial services companies.

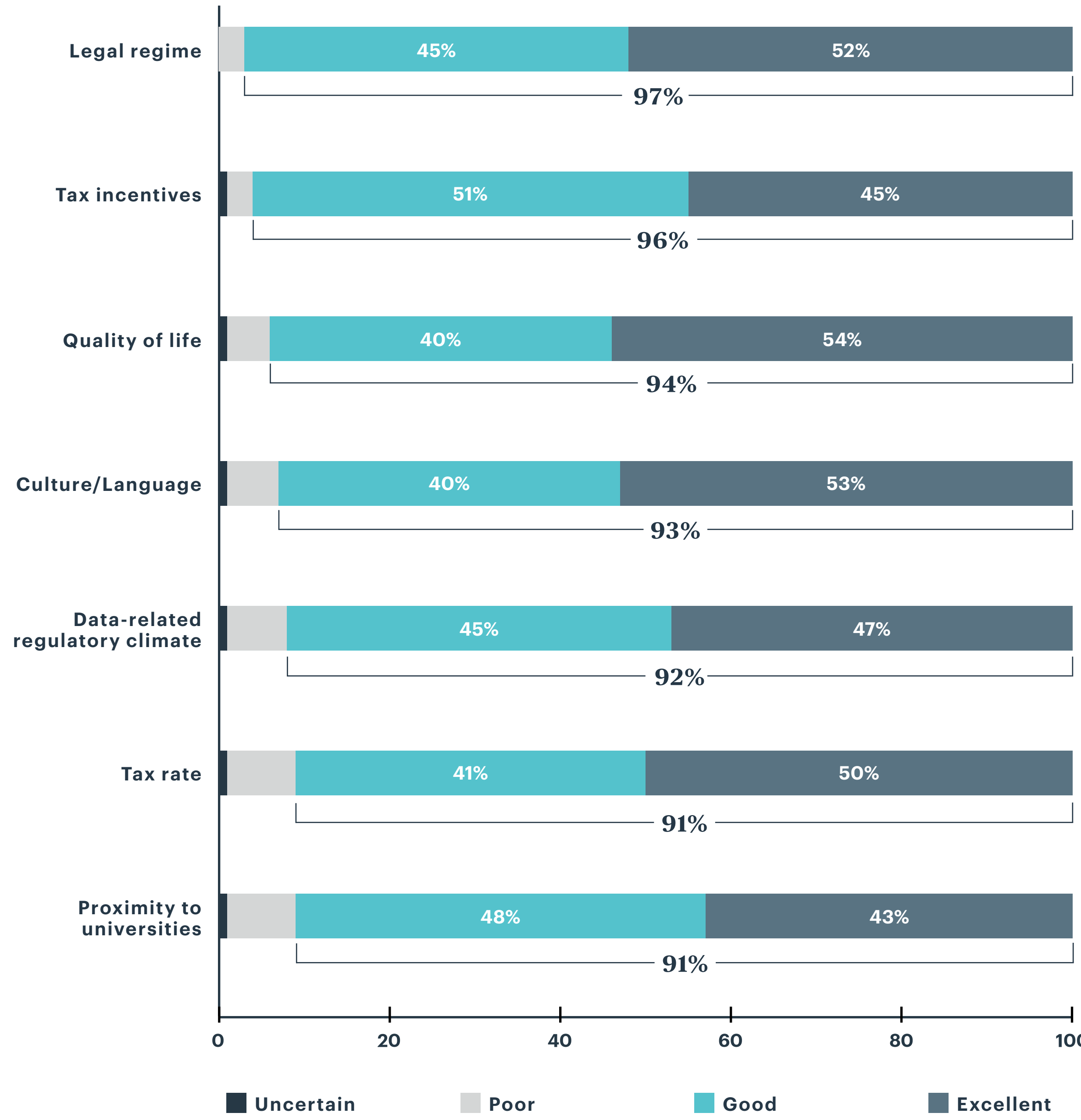
These companies have chosen Ireland for a variety of reasons, including its young and highly educated workforce, its competitive tax regime, the stable political climate and strong pro-business environment. Ireland is also in a unique position as one of only two remaining common law jurisdictions within the EU and Eurozone, and has a beneficial geographic location between time zones in the US, Europe and the Far East.

9	10	5	14	8	8
of the top	of the top	of the top	of the top	of the top	of the top
10	10	5	15	10	10
US TECH	WORLD'S PHARMA	GLOBAL SOFTWARE	MEDICAL TECH	INDUSTRIAL AUTOMATION	FINANCIAL SERVICES

Ireland rates highly across key criteria for choosing an EU location

Our report found that the most important factors for international firms considering an EU location (or a further or alternative EU location or an expansion of a current EU location) are data-related regulatory regimes, the legal framework and regime, language and culture, and political stability and regulatory track record.

Ireland continues to rate highly across all of these and other influencing criteria.



Please rate Ireland in terms of:

Importance of greater harmonisation of data protection laws

The General Data Protection Regulation (GDPR), despite vastly increased fines and a more onerous compliance regime than applied prior to its implementation in May 2018, was broadly welcomed by international companies. Indeed, 76% of respondents in the 2016 survey agreed that tighter regulatory controls over data represented the best way forward. Many international organisations perceived the EU as suffering from a lack of harmonisation, leaving organisations to pursue a complex, expensive and uncertain jurisdiction-by-jurisdiction approach. There was therefore a reasonable expectation that harmonisation would deliver cost and efficiency benefits.

The GDPR has had a significant impact on investment plans since its introduction. 73% of respondents in our previous report said they had significantly increased spending on dealing with privacy and/or information security matters while 40% said their willingness to invest in new EU data operations has significantly reduced as a result. Interest in expanding EU operations in general has significantly reduced among 37% of respondents.

More significant perhaps is the fact that firms appear concerned and even confused about some aspects of the implementation of the GDPR data regime in Europe. For example, 89% of firms now agree that the interpretation and enforcement of privacy regulations in the EU varies significantly between member states. This suggests a demand for much greater EU-wide coordination is essential. This is up from 61% in 2016, a very significant increase.

Furthermore, a similar proportion (85%) agree that concern over privacy and related issues is a key driver for having discrete data operations in the EU. This is an increase from 81% in 2016.

A natural consequence of disparities across a supposedly harmonised single market is the prospect of regulatory forum shopping with the selection of the country of regulation becoming of critical importance in investment decisions. Fortunately for Ireland, the Irish Regulator enjoys an excellent reputation being renowned as 'firm but fair' by international organisations.

89%

of firms agree that the practical interpretation and enforcement of privacy regulations in the EU varies significantly between the member states

73%

of respondents said they had significantly increased spending on dealing with privacy and/or information security matters

40%

said their willingness to invest in new EU data operations has significantly reduced as a result of dealing with privacy and/or information security matters

37%

said interest in expanding EU operations in general has significantly reduced

11%

reported no significant impact

Substantial investments made in privacy and information security

It is not surprising that our report showed 73% of organisations are increasing their investment in information security.

Regardless of the business model, country of operation, size, strategy, or industry, every company can become a victim of cyberattacks.

Secure data are a key asset in order to ensure the smooth flow of business operations and to mitigate functional risks.

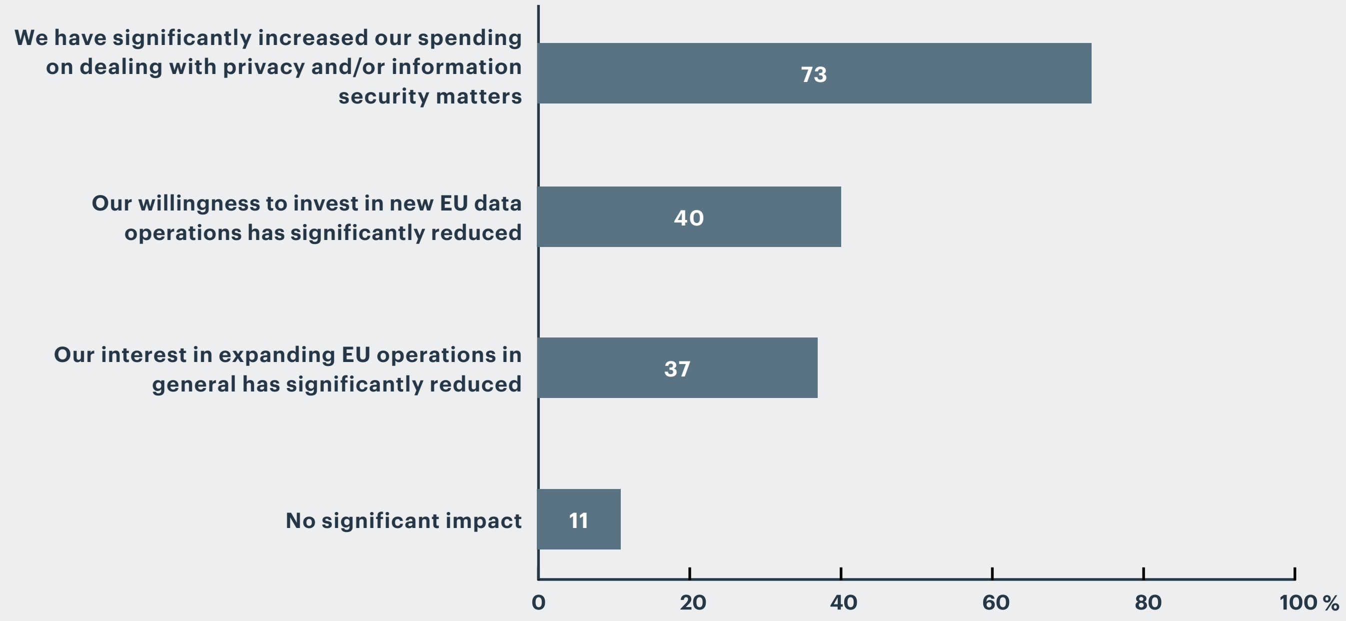
Factors driving substantial investments in privacy and information security derive from legislative change at EU level and regulators imposing penal fines on companies that have failed to implement and maintain adequate data and cybersecurity standards.

The European Commission has recognised that measures aimed at protecting key services and infrastructures from both cyber and physical risks need to be updated. It launched its EU Cybersecurity Strategy in December 2020 with the aim of bolstering Europe's collective resilience against cyber threats, to help safeguard a global and open Internet and protect the fundamental rights of all.

In tandem, European Data Protection Regulators have also imposed more than €158m in GDPR fines during 2020 bringing the total amount of such fines to more than €272m in the period from May 2018 to December 2020. Some of the largest GDPR fines have arisen from failures in meeting adequate data security and/or cybersecurity standards: British Airways (£26m), Marriot Hotels (£18.4m), Capio St. Göran's Hospital AB, Sweden (SEK30m), the National Revenue Agency of Bulgaria (€2.6m) and Ticketmaster (£1.25m).

Data are a key corporate asset; trust and security are core considerations for private and public sector entities that seek to ensure the smooth flow of business operations. When data security is achieved, data can be used to acquire competitive advantage and growth, factors not lost on almost three-quarters of our respondents.

73% stated they have significantly increased their privacy and information security spending



How has the implementation of the fine regime impacted on your company's EU investments?

Strategic technologies

Despite challenges faced in dealing with economic uncertainty and regulatory concerns, businesses are enthusiastic about the part that new and emerging technologies will play in their future success.

We are now at the start of what has become known as the Fourth Industrial Revolution (Industry 4.0) which is being driven by the combined impact of several technologies including artificial intelligence (AI) and machine learning, blockchain, the internet of things (IoT), and 5G telecommunications.

It is not unusual to see incredibly rapid development associated with all these technologies, sometimes influenced by market demands, sometimes creating entirely new markets. Different 'flavours' are emerging all the time, such as the internet of behaviours (IoB), distributed cloud and anywhere operations. Businesses in our survey set out how they are planning to deal with and make the most of these innovations. Our survey respondents identified the most significant expected impact would be on employment levels and skill requirements (90%) with privacy as a close second (86%).

AI

Businesses need to be open-minded, agile and flexible when it comes to adoption of these new technologies, which require considerable planning and investment. Our research reveals the most significant intentions for spending in respect of **AI** technologies over the next 18 months. Investment in infrastructure assets such as servers comes out on top for 79% of respondents. The next highest priority is research & development and IP for 66% of companies. A need for additional premises/ facilities came in third with 53% of respondents planning spending in that area.

As with any technological advancement or other major change, there will always be various societal and economic consequences. Some of these have given rise to ethical concerns in relation to adoption and deployment of these new technologies. We asked firms if they shared those concerns when it comes to the future of their businesses. A significant majority (78%) agreed that ethical issues were a concern.

In light of these findings, it is interesting that 83% of organisations believe that regulation will help businesses like theirs to adjust to the future impact of these emerging technologies. Perhaps at least some of them feel that the regulators will be able to deal with the ethical issues on their behalf.

Blockchain

Blockchain is commanding considerable attention at C-suite level and it is heartening to see that many businesses are planning in relation to it. 80% of companies surveyed expect significant impact on supply chain and supplier payments.

Investment intentions with blockchain are similar to **AI**, with 74% planning to spend on technology assets needed in that area. This was followed by research & development and IP (58%) and physical facilities (51%).

Tracking and tracing the supply chain (67%), protecting data privacy (64%), and alternative payment system provision (62%) were identified as the chief benefits of the technology.

Given the concerns surrounding cryptocurrencies it is not altogether surprising that 75% of organisations expect regulation to play a positive role in helping them adjust to the future impact of blockchain.

5G

5G is probably the most widespread of the new technologies explored in the survey, as many countries have already begun rolling out these new networks.

Our report shows that the great majority of organisations are already planning for the strategic impact of 5G mobile technologies on their business. 89% are preparing for changes to new product development, 81% are planning for its impact on communications security while 79% are looking at related investment priorities.

The top three investment priorities are the same as with blockchain and AI. Technology assets lead the way with 71% of companies while physical facilities and research & development are identified by 53%.

IoT

IoT is a combination of technologies including communications, devices, sensors and sometimes involve elements of AI/ machine learning. This is very much at the heart of Industry 4.0. It is also a pillar for the development of the smart cities and enterprises of the not so distant future.

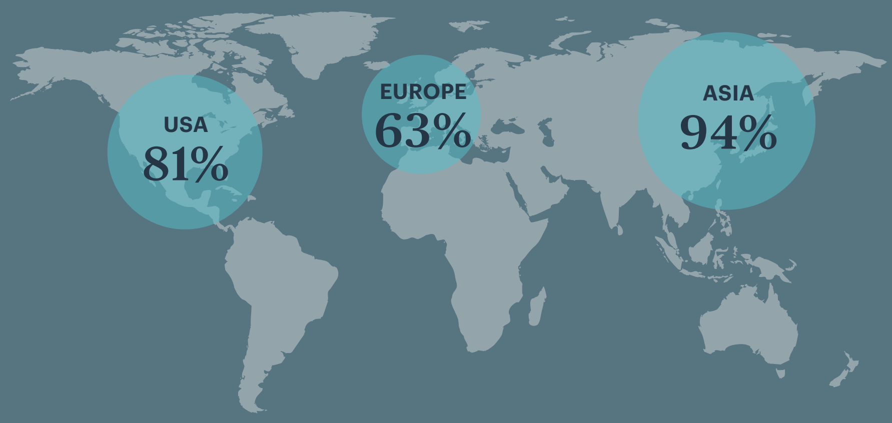
Improving just-in-time ordering and production processes (77%), capturing real-time customer feedback (65%), and reducing waste and improving sustainability of operations and production (48%) were identified as key benefits of IoT.

When it comes to investment intentions, 70% of organisations intend spending on IoT related technology assets, 63% will invest in research & development and IP activities, while 55% will invest in physical facilities.

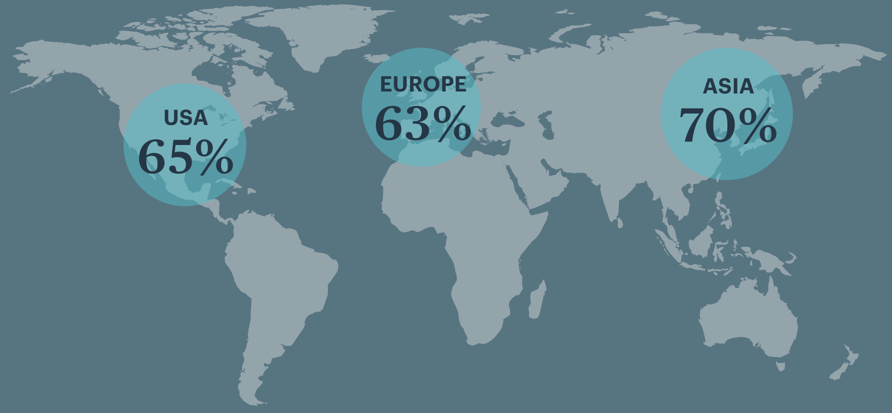
Ireland, with its highly developed technology industry both in terms of the established industry giants and a vibrant new wave of start-ups, is well place to benefit from investment in and adoption of these new technologies.

Most valuable business benefits from IoT

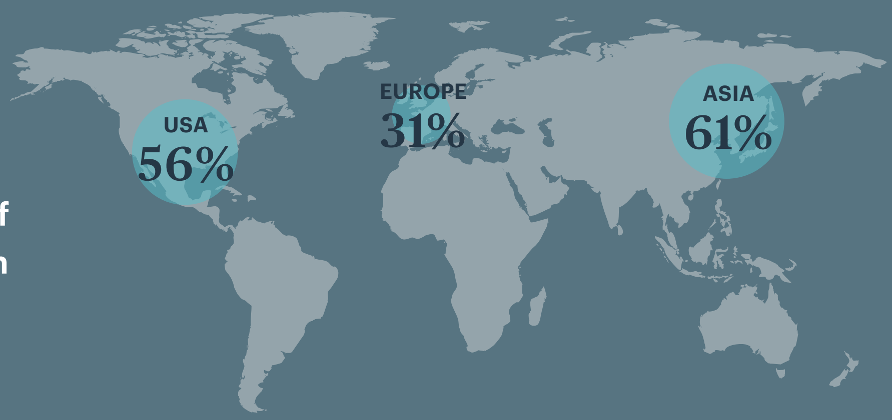
Improving just-in-time ordering and production processes



Capturing real-time customer feedback



Reducing waste and improving sustainability of operations and production



Industry view

Innovating to survive in food and farming

AIDAN CONNOLLY
Chief Executive Officer
Cainthus
President
AgriTech Capital

In the middle of a pandemic it's difficult to think about survival, but that's what the food and farming industries have had to do. Most of us have taken food security for granted, however, temporary challenges due to lockdowns during the pandemic and issues immediately following Brexit, all highlight the need for greater use of technology in the system for food production and supply.

The food industry must first face up to some very real challenges. Too many low paid jobs. Too labour-intensive. Greater demand for transparency about food provenance. There are specialised jobs in farming that haven't changed much in the past 200 years, perhaps not even in 2,000 years. In any case, this is an industry ripe for disruption and transformation.

Agriculture has been described as the least digitized industry. Despite a record 'tsunami' of investment in food tech, crop tech and livestock in the last few years, this is still the case. Application cases for robots, sensors and 3-D printing have been clear but market adoption is still limited to less than 5%. Augmented reality and virtual reality are transforming teaching and training, both in universities and on the job. While the uptake has been relatively slow, the pandemic has certainly accelerated things. Blockchain is threatening to do the same for transparency about provenance in the food chain, but even with the backing of giants such as Wal-Mart, Carrefour, Danone and others, it is still nascent.

So what does the transformed food chain look like? We are rapidly moving beyond affordability and availability, even in parts of the world that traditionally had insufficient resources. I expect that the future focus will be on what I call the 'prosumer' agenda. This would mean crops and vegetables being grown in the most carbon neutral and environmentally sustainable manner possible. We would maintain animals to ensure a minimal carbon footprint. Some would even go so far as to argue (looking at the full life cycle and inputs analysis) that milk, meat and eggs can actually be carbon positive. Aside from environmental issues, concerns about animals are increasingly focused on welfare.

Generally, especially for supermarkets and restaurants, minimising food waste, addressing labour concerns and the quality of nutrition from a human perspective, have all become much more important. The digital revolution can and has been used to assist in addressing these.

As the CEO of Cainthus and President of AgriTech Capital, it is clear to me how society is adjusting to the changes in farming that I have described. Cainthus is a company dedicated to digitizing images of livestock and delivering insights to the phones and laptops of dairy and other livestock farmers. The quality of young talent in the business now is amazing. They are motivated and passionate about a business that is truly capable of changing the world. I see the same in the hundreds of agtech and foodtech startups, creating fundamental innovation in an industry that previously had experienced only incremental change.

Industry view

How important are data and data analytics to ConsenSys?

PATRICK MCEVOY
Country Lead for
ConsenSys Ireland
and Lead Counsel

Data is central to ConsenSys and what we do. Blockchain and decentralised finance (DeFi) are growing exponentially. This can make the expanding network of protocols and applications difficult to understand and challenging to monitor.

Our full-stack Ethereum products help developers build next-generation networks and enable enterprises to launch more powerful financial infrastructure. Reliable, simplified, and actionable data is key to inspire investor confidence and alleviate the risks of engaging with crypto funds, traders, and platforms. ConsenSys software and other third party products help mitigate those risks. For example, our "Codefi Data" product powers DeFi Score, Compare, and Inspect, a suite of data and risk analytics tools designed to help investors understand the risks and trade-offs of deploying capital into the DeFi space.

When paired with Blockchain is Data Analytics enhanced (in other words how can Blockchain/Distributed Ledger Technology help data analytics and vice versa)?

The combination of data science and blockchain technology is a game-changer. Data science relies on high integrity of data and the immutability of blockchain ensures that on-chain data can never be modified. Blockchain technology therefore guarantees a high level of reliability, trustworthiness and veracity of data, allowing data scientists and others to perform better quality analysis. It can help address problems such as human error, data duplication, and false information often encountered when dealing with huge volumes of data. Moreover, because blockchain data is also available in real time and is natively digital and all API-driven, blockchain developers can now build real-time analysis tools for a variety of features, which is different than the prior web 2.0 experience of "data dumps" and retroactive analysis to determine future actions.

Better quality data allows companies, governments and organisations to make better decisions. The effects of this combination of blockchain and data science can already be seen in the DeFi world where companies are using advanced predictive analysis techniques to determine future performance of cryptocurrencies. We expect the synergies between blockchain and data science to expand into other areas too. Finally, blockchain data is publicly available with no barriers to entry, so it's accessible by everyone, not just those with privileged access or capital to aggregate it.

Which countries in the EU and globally are becoming leaders / ground breakers in Blockchain/Distributed Ledger Technology and Data Analytics technologies?

The UK, Ireland, France, Germany and Switzerland are fast becoming blockchain hubs. The desire for Ireland to become a leading player in blockchain comes from the top down. In March 2018, the Minister for Finance published a discussion paper on virtual currencies and blockchain technology. The Government also announced the creation of an internal working group to focus on the area, in recognition of the fact that blockchain technology has the potential to be a "catalyst for innovation in the financial services sector and elsewhere".

Blockchain Ireland, an initiative initially led by the Irish Development Authority, has been key to bringing together the diverse players in Ireland's blockchain community. Decisions by companies including Coinbase, W3BCLOUD, Wachsman, R3 Corda and the we.trade group to base offices in Dublin, as well as ConsenSys of course, also backs up Ireland's position as a blockchain location of choice. A stable regulatory regime, government support for blockchain and Ireland's status as the only English-speaking common law country in the EU mean that Ireland will continue to attract more blockchain companies.

ABOUT AMÁRACH

Amárach is an independent research consultancy, measuring the business implications of consumer and business trends in Ireland and abroad.

METHODOLOGY

Amárach conducted an online survey of over 300 C-suite decision makers in businesses turning over a minimum of $30 million, headquartered in six different countries (China, Germany, India, Ireland, UK and US). The sample has been weighted to be comparable with the previous study in 2016.

We would like to thank all those that contributed in making this report, especially *Aidan Connolly* and *Patrick McEvoy*, for generously giving their time and insights.

ABOUT WILLIAM FRY

William Fry is one of Ireland's leading legal and tax practices with over 460 professionals. Our client-focused service combines technical excellence with commercial awareness and a practical, constructive approach to business issues.

We advise leading domestic and international corporations, financial institutions and government organisations. We regularly act on complex, multi-jurisdictional transactions and commercial disputes.

We are ranked by international directories, clients and market commentators alike as being a leader in our main areas of work: Corporate & M&A, Banking & Finance, Technology, Litigation & Dispute Resolution, Asset Management & Investment Funds, Real Estate, Insurance, Tax, Competition & Regulation, Projects & Construction, Life Sciences & Healthcare, and Employment & Benefits.

Our Tax team brings together tax lawyers, accountants and consultants in one highly innovative team. We are also Ireland's only representative member of Taxand, a global firm of tax advisors with more than 550 tax partners who are represented in over 50 countries.

LEADERS IN ADVISING ON INWARD INVESTMENT PROJECTS

Inward investment is one of William Fry's core practice areas. With a team of commercially focused legal and tax professionals who possess unrivalled experience and expertise, we understand the challenges facing a company looking to establish and grow in Ireland. We are the leaders in advising multinational investment into Ireland. We continue to make significant investment in our overseas presence, including opening our third US office, in San Francisco. Our London office continues to grow, and as an independent law firm we avail of a strong global law firm network to service our clients at home and abroad.

IRELAND'S LARGEST TECHNOLOGY & IP PRACTICE

Our Technology team is market leading in advising on all aspects of technology matters for suppliers, users and creators. We advise on supply of goods/services, licensing, outsourcing, e-commerce, data protection and intellectual property, as well as the broader range of corporate and commercial transactions typical in a full service law firm. Our client base includes both Irish high potential start-up companies and established international brands.

FINANCIAL SERVICES & EUROPE

Our dedicated Financial Services and FinTech teams draw on our market leading Asset Management and Investment Funds, Insurance, Inward Investment, Tax, Banking & Finance, Technology & Data, and Regulatory teams to provide strategic and practical advice to both mature and growing multinational businesses.

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