An aerial night view of a city, likely Dublin, Ireland. The scene is dominated by a large, white, multi-story building with a curved facade and a prominent glass-enclosed tower. A bridge with a lattice structure spans a river in the foreground. The city lights are visible in the background, and the overall atmosphere is illuminated by the warm glow of streetlights and building lights.

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This survey of 1,000 consumers and 200 business decision makers in Ireland was conducted by Censuswide in May and June 2019.

The business decision makers came from organisations in the retail, manufacturing, financial services, transport, utilities and public sectors. Consumers were aged between 18 and 64.

# Foreword

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As the proverb says, may you live in interesting times. We certainly do. This generation, possibly more so than any other, is defined by the rate of societal, environmental, economic and political change which it is living through.

In the last 5 years we have been posed with political and societal questions, to which the eventual answers and their consequences will define not just this generation but several more to come. These changes will affect us all, impacting the way we work and the way we live, as well as Ireland's economic prosperity and political stability.

For workers, consumers, or for us privileged few as business leaders, this rate of change that we are experiencing, driven largely by technology, has been radical. How we collectively respond to these changes will have a major bearing on the success of Ireland over the coming decades. Adaptability, agility and flexibility will be essential.

To get a better understanding of the extent, effect, context and attitudinal response to these radical changes, we have commissioned a survey of 1,000 members of the public and 200 business leaders in Ireland. Their responses provide context to the changes of the last five years; our hopes and fears for the future; the transformational impact of technology; the influence of organisations; and the significance of trust in driving a positive, thriving future.

The majority of the Irish public believe that the way we manage change today is vital to the health and success of future generations. Organisations lie at the heart of this, playing a critical role in our nation's future development and success.

There is an onus on us all but particularly on tech organisations and governments to help people come to terms with the radical change that lies before them. Our ability to adapt and thrive through these changes will have a major bearing on how we tackle challenges such as climate change. We need to increasingly fulfil the promise to work and operate as both responsible and sustainable businesses. That is the expectation that the public has made known to us.

Fujitsu has always been a company that thrives on change by adapting and helping our customers to plan and manage this process by getting the most out of digital technologies. It's never been more important that we get this right. With a greater understanding of the public's experiences and expectations, leaders can respond to change in the right way – and ensure that as a nation, we succeed together.



**Tony O'Malley**  
CEO, Fujitsu Ireland

# The public vs. business leaders

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## A view from the public

The public believes that in the last five years, life has changed in Ireland; in fact, 49% believe the pace of this change is faster than anything that they've experienced before. And while some of this change has been positive – like technological innovation (60%) – much of it has been negative, such as political uncertainty (54%) and economic uncertainty (49%). And when citizens look to the future, although a quarter feel positive, nearly as many feel nervous about what's ahead.

Technology has been a key part of this change, but the public has a complicated and nuanced view on its role. Most people say that technology has been the most positive development of any in Ireland (60%), benefitting their education, relationships with family and friends and their careers. In fact, one in three people couldn't live without tech for more than three days.

There are signs, however, that the public simply doesn't understand a number of emerging technologies, from quantum computing to artificial intelligence, and can't see the role they will play in national life. There are also technologies that some citizens aren't prepared to use, ever, including driverless vehicles (29%), cryptocurrency (24%) and drone technology (23%). People are concerned about many of the impacts of technological change, such as the risks of data sharing and whether we will become too reliant on tech. But nonetheless, half of citizens want organisations to adopt technology more quickly (52%), for fear that Ireland could miss out.

Looking to the future, people are acutely aware of the importance of navigating this period of change successfully; the majority believe it will be critical to

the health and success of future generations (61%). But there are serious doubts about the readiness of organisations to lead the country through. Just a third think that organisations are ready for the radical change ahead. Importantly, many members of the public have lost trust in public and private sector companies, citing issues with accountability and data breaches as the cause.

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## Technology is the greatest positive change people have experienced in the last five years.

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The public believes that the primary purpose of an organisation should be to have a positive impact on life in Ireland (40%), but more than half think that companies do not truly care about their impact on the world (53%). To secure success in the years ahead, organisations will need to build greater trust amongst the public – their customers and employees – by putting humanity at the heart of their transformation.

## The view from the country's business leaders

In the last five years, leaders have seen significant change to their own organisation (96%), with nearly half describing that change as radical. But unlike the public, most felt prepared for that change (59%), with plans in place for their overarching business strategy, operations and product innovation and development. Perhaps as a result, the words that most leaders felt summed up change are positive progress (48%) and excitement (20%). Even so, half admit that despite their plans, their organisations have struggled to adapt to the changes they have experienced.

Technology has been a significant and positive driving force for change in many organisations (79%). Organisations have invested an average of €671,874 in technologies including biometrics, artificial intelligence and robotics. The majority feel that technology will also be vital to their future success (68%), and it's AI that leaders believe will have the biggest impact (36%).

But many are concerned about missing out on the benefits of innovation due to inadequate planning. And concerns about responses to technology have been a concern in the past, with the majority admitting that public or consumer nervousness has previously stopped them from adopting certain technologies (46%).

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**We must collectively do more to show we are responsible businesses and lead on important societal issues.**

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Looking to the future, the majority of leaders are positive about what's to come (73%) but are clear about the need for adaptability. Two thirds believe that the ability to plan for change will be critical, and most organisations have shortened their planning cycle. But nonetheless, leaders admit that they cannot predict what their customers will want (41%) – or what their sector will look like (41%) – in five years' time. Almost half say that in its current form, their organisation will be unable to cope with radical change (48%).

Companies are increasingly recognising their own importance in Ireland, with the majority saying as an organisation they are responsible for driving positive change (67%). Organisations are making efforts to improve their social impact, with three quarters agreeing that they have become more responsible over the last five years. However, leaders recognise

that there is an issue with public trust, with nearly half admitting that people trust their organisation less than five years ago. Some leaders simply conclude that the public's demands are too high – and a quarter don't think they will ever be able to meet them (31%). But with consumers increasingly making purchasing and employment decisions based on an organisation's social impact, responsibility may well become a key determinate of which businesses succeed and which do not.

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**Adaptability will be a determining factor on which businesses survive and thrive during radical change.**

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# Comparing the UK and Ireland

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## A view from the public

Like the Irish public, citizens in the UK believe that life has changed in their country in the last five years, with two fifths agreeing that this transformation has been faster than anything that they've experienced previously. But although the British public agrees that technological innovation has been positive (49%), they are more negative about changes like political uncertainty (62% compared to 54%) and economic uncertainty (56% compared to 49%).

And overall, the mood in the UK is more negative than in Ireland. Although one in four are positive about the future, equalling Irish citizens, the majority of British people are nervous (27%), disappointed (23%) or fearful (11%) about what lies ahead.

Like their Irish counterparts, the UK has a nuanced view on the technology that has been a key driving force behind change. Technology is still deemed to be the most positive change that has taken place in recent years, although this is a view held by slightly fewer UK citizens (39%) than Irish (60%).

As well as its benefits for their education and relationships with family and friends, British people point to the advantages of technology for their personal finances – in contrast to Irish citizens, who more frequently point to benefits for their careers. Just as in Ireland, one in three British people now couldn't live without tech for more than three days.

However, there are suggestions that the British public is having a similarly difficult time understanding emerging technologies, such as quantum computing and artificial intelligence. And UK citizens are even more reticent to use certain technologies than their counterparts in Ireland, including driverless vehicles (31% compared to 29%), drone technology (31%

compared to 23%) and cryptocurrency (30% compared to 24%).

The UK public shares Irish concerns about the impacts of technological development, such as the risks of data-sharing and becoming too dependent on tech. But just like in Ireland, there's a desire for organisations to adopt technology more quickly, for fear that the country could miss out; however, this view is held by fewer UK (36%) than Irish (52%) citizens.

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## Public trust in organisations is a shared concern showing the body of work we must undergo to enfranchise the public on this journey of change.

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Similarly to Ireland, most UK citizens believe that navigating this period of change successfully will be vital for future generations (46%). But the British public is even more sceptical about the ability of organisations to successfully steer the country through its current challenges. Only a quarter think that public and private sector organisations are ready for what's ahead, compared to a third of Irish citizens. Like in Ireland, data breaches have been a driver of this loss of trust, but while Irish citizens also point to a lack of transparency in organisations, British people are more likely to cite loss of faith in leaders.

Both British and Irish citizens agree that the primary purpose of organisations should be to have a positive impact on life in their countries – and around half agree that companies don't truly care about their impact on the world (43% in the UK and 53% in Ireland). Organisations in both countries face the same challenge of building greater trust amongst the public in the years ahead.

## The view from the country's business leaders

In many ways, organisations based in the UK have had a similar experience to those in Ireland over the last five years, with almost all organisations experiencing change (93%). The majority of leaders felt prepared for that change (57%, close to the 59% in Ireland), with plans in place for their overarching business strategy, operations and product innovation and development.

As a result, the mood amongst organisations in the UK is much more positive than the public; like their Irish counterparts, leaders point to positive progress (42%) and excitement (20%) as the words best summarising the changes they've experienced. However, there are distinctly unsettled undertones in the business community, as 44% say that the sheer pace and scale of change in the UK has led them to consider moving to another country.

Business leaders in the UK exactly mirror their Irish counterparts in pointing to technology as a significant and positive driver of change (79% in each country). But UK organisations have invested more than double as much in technology, at an average of £1,322,275 (€1,476,107) per organisation compared to €671,874 in Ireland. In both countries, artificial intelligence and biometrics have been key focuses. But it's 5G that UK leaders believe will have the biggest impact (38%) – in contrast to Irish leaders, who point to artificial intelligence (38%).

However, leaders of UK organisations admit that their adoption of some technologies has been hindered by concerns about the nervousness of consumers or employees; this has impacted more British (58%) than Irish (46%) organisations.

Looking to the future, leaders at organisations in the UK are even more positive about what's to come than their Irish counterparts (79% compared to 73%). But

at the same time, UK leaders are more prepared to admit that they don't know what their customers will want (46% compared to 41%) or their sector will look like (48% compared to 41%) in five years' time.

The need to plan for change is underlined in both countries. Three quarters of leaders at UK organisations say adaptability will be critical, compared to two thirds in Ireland. Almost half of both British (47%) and Irish (48%) leaders go so far as to say that in its current form, their organisation will be unable to cope with radical change.

Like their counterparts in Ireland, organisations in the UK are increasingly recognising their importance to life in the country. The majority of leaders agree that their organisation is responsible for driving positive change, although in the UK this figure is lower (53%) than in Ireland (67%). And while three quarters of Irish organisations have made efforts to become more responsible in the last five years, in the UK this falls to two thirds.

This may be because there appears to be less of a sense in the UK that public trust has eroded; almost twice as many organisations in Ireland (46%) as in the UK (26%) believe that people trust their organisation less now than five years ago. But in both countries, there is a significant proportion of leaders who believe that the public's expectations are too high, and their organisation will never be able to meet them (31% in Ireland and 27% in the UK).

With corporate responsibility a priority for both the British and the Irish public, it will be up to organisations in both countries to focus on improving their social impact if they are to succeed in the uncertain times ahead.

# Industry Trends

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**Every industry has faced disruption in recent years, as both public and private sector leaders grapple with the immense pressures they face to satisfy demand from their consumers and citizens.**

## Financial Services

Financial services leaders are the most likely to say that their organisation has experienced radical change in the last five years (51%), but that change has also been the most beneficial of any sector – with 100% of respondents deeming it positive or very positive. Firms have invested an average of €827,389 in technology over the last five years. Nearly every leader believes that technological innovation has benefitted them (84%), and within the organisation, the greatest change has come within business operations (39%). Looking ahead, 5G is expected to have the biggest impact on financial organisations. However, employee acceptance of any change is predicted to be the biggest stumbling block (46%), underlining the importance of considering the workforce during transformation programmes.

## Manufacturing

Manufacturing business leaders are generally pleased with the changes over the last five years, with a third describing them as very positive for the business (36%). Innovation has been a prominent theme, as product development is the area that has seen the most change – while technology has had a positive impact on 76% of organisations.

Manufacturers have invested an average of €650,254 and believe that in the future artificial intelligence will have the biggest impact on the business. But despite a positive view of what's ahead, manufacturers are most concerned that employee acceptance of change could hinder their success (46%), rendering the

way that technology is implemented and employee communication critical.

## Public Sector

Leaders of public sector organisations seem to have had the most challenging time adapting to some of the changes of the last five years, with three quarters stating that political upheaval has had a negative impact on them. Public sector organisations are also the least likely to have felt the benefits of innovation, with a quarter saying that technology has had a negative impact. This is despite the fact that these organisations have spent €1,246,874 on technology the most of any sector. This might reflect challenges with employee mindsets, as leaders believe their biggest challenge in the future will be the organisation's cultural discomfort with adapting to change. But with the public eager to see technology used to improve public services (27%), it will be important for organisations to develop dynamic people strategies.

## Retail & Hospitality

The retail sector has perhaps felt the impact of technology the least within the business, with a fifth saying that innovation has not had any impact on them at all (20%). Nonetheless, retailers have invested €551,201 in technology over the last five years, with nearly half implementing biometrics (44%). But going forward, the majority believe that artificial intelligence will have the biggest impact on the sector (35%). Retailers don't feel particularly

prepared for the future, with many pointing to their biggest challenge as lacking the plans needed to help them adapt. A third say that they simply can't predict how the sector will look in five years' time.

## Transport

Leaders in the transport sector are the least likely to report that their organisation has experienced radical change, although that figure is still one in three (31%). Transport organisations feel the most positive about the impact of technological change (92%), and technology has clearly impacted people strategies, as the biggest change in the business has been the training or reskilling of employees. Leaders have invested a relatively low figure of €411,538 in technology over the last five years. Looking ahead, perhaps predictably transport leaders foresee that electric vehicles will be the most influential technology in their sector. However, more than half admit that they cannot foresee what transport will look like in five years' time, rendering adaptability critical.

## Energy & Utilities

Nine tenths of the leaders at utility companies believe that the changes of the last five years have been positive, with half in fact stating that political upheaval has been good for their organisation. Almost all agree that technology has benefitted the business (90%), although leaders invested the least of any sector at €226,249, and the biggest change has come in the way that people work (50%). Looking ahead, utility companies believe that 5G (50%) and virtual reality (50%) will be the most influential technologies in the business, perhaps underpinning the creation of a smart network or improved maintenance operations. However, leaders are concerned about having the culture and the operational infrastructure that can cope with change (both 60%), rendering a dynamic transformation strategy critical.



# A radically changing world

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The Irish public is experiencing a period of greater change than ever before, and although much of the change has been positive there is underlying uncertainty about what has happened – and what's to come. Organisations are more excited about the future and many have changed their approach to planning. However, business leaders still harbour some doubts about their future-readiness, as plans have failed to meet expectations in the past. Adaptability will be key, but given the public's less optimistic view of the future, organisations must consider carefully their approach to wider Irish society as they respond to change.

There has been so much discussion about change in the business world recently that it's almost taken as a given. But it's important to remember that, at work and at home, people's lives have changed radically in a handful of years and even months.

So as we consider where we're going, it's insightful to gauge where we've come from in the last five years and our views on that change to date. And both citizens and leaders are clear: the foundations of every day life have been shaken up, with negative and positive consequences – and the ability to transform will be pivotal to the future.

## A time of great change

The public and the wider business world certainly agree that change has happened. The vast majority of leaders say that their organisation has changed in the last five years (96%), with nearly half describing that change as radical (46%).

The public is seeing that transformation too, with three quarters agreeing that life in Ireland has changed in the same period (88%). The sheer extent of that change, however, has been unexpected. Almost half of citizens have been surprised by the amount of change they've seen (47%), compared to

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**Change is happening faster than ever before. Business leaders and organisations must provide assurance to the public to ensure they are prepared and at ease with this state of flux.**

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just 15% who have not. In fact, 49% would go so far as to say that the scale of this change is greater than anything they've experienced before.

By contrast, the majority of the business community feel they were prepared for the change in Ireland (59%), compared to just 17% who were not. Leaders feel that they had strong strategies in place for their overall business plan (49%), operational strategy (45%) and product innovation and development (45%).

Nonetheless, over a third (35%) believe that their overall business strategy could have benefitted from more focus – and half admit that they have struggled to adapt to the changes they have experienced (50%).

This perhaps suggest that although leaders were confident in their plans, they failed to meet their needs when change actually took place.

## What's new?

So how has life changed – and what do we think about it? According to the public, change has been multifaceted, with some trends for the good and some for the bad.

Technological innovation is the most positive change selected by the public (60%) and leaders (76%) alike. The public also highlighted the benefits of culture change (57%) and workplace change (45%).

The public has also seen a range of changes in their everyday life, including the way they shop (40%), the way they bank (39%) and the way they access media and entertainment (37%).

Day to day operations within organisations have changed too, with leaders pointing to developments in their working environment (35%) and service delivery (31%), followed by product innovation (31%).

Citizens see the most negative developments as political upheaval (54%) and economic uncertainty (49%), which are views echoed by business leaders (29% and 22% respectively).

Interestingly though, a third of leaders view political upheaval – including Brexit – as being positive for their organisation (33%), underlining that uncertainty can have unexpectedly positive, as well as negative, consequences.

There are some differences in attitudes between the general public and business leaders. The words that organisational leaders feel best represent the changes they have experienced are 'positive progress' (48%) and 'excited' (20%).

By contrast, although a quarter of the Irish public selected 'positive' (25%), this was closely followed by 'nervous' (23%).

Overall, 96% of leaders feel positive about change over the last five years. But while half of the public says change has been positive (54%), a quarter view it as negative (27%). Most citizens say that the change in their lives has been 'very negative' (33%). Only 28% of citizens feel that the Irish public was fully prepared for the changes taking place.

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**Cultural change, including diversity and inclusion and the advancement of women's rights, are seen by the majority of Irish people as a positive change.**

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## Continuing transformation

Change certainly isn't expected to slow down. Over the next five years, the public expect that life in Ireland will change much more noticeably because of technological innovation (60%), economic uncertainty (54%) and political upheaval (53%).

Our companies will continue to change too. Business leaders predict that their organisation will see the greatest transformation in their product innovation and development (50%), training and re-skilling of employees and service delivery (45%).

Perhaps notably though, the areas where leaders would like to see the most change are different; the way people work (44%), internal communication (39%) and customer communication (39%).

This underlines the very human impact of organisational change – and the need for employment and communication strategies that can keep up.

## Coping with change

To contend with the greater pace of change, many organisations have already evolved their approach to planning. The majority said that their planning cycle has shortened (46%), in order to:

- **Deliver what their customer needs (27%)**
- **Maintain their focus on overall goals (23%)**
- **Help them to cope with radical changes in the industry (18%)**

That said, a significant proportion of business leaders report that their planning cycle has got longer (41%), suggesting a potentially less reactive attitude to change.

Despite their planning, leaders acknowledge that their organisations' success could be put at risk by difficulties keeping up with the changing customer and new technology. Leaders say the biggest risks they face is understanding and targeting new customers (36%), keeping up with technological developments (32%) and fulfilling the needs of existing customers (30%). Interestingly, cyber-attacks and data theft represent leaders' next most common concern (30%).

There are also worries about the readiness of organisations to transform. A third of leaders are concerned about their employees' (41%) and customers' (38%) acceptance of change. A further third are worried that they simply don't have the plan in place to help them adapt (36%).

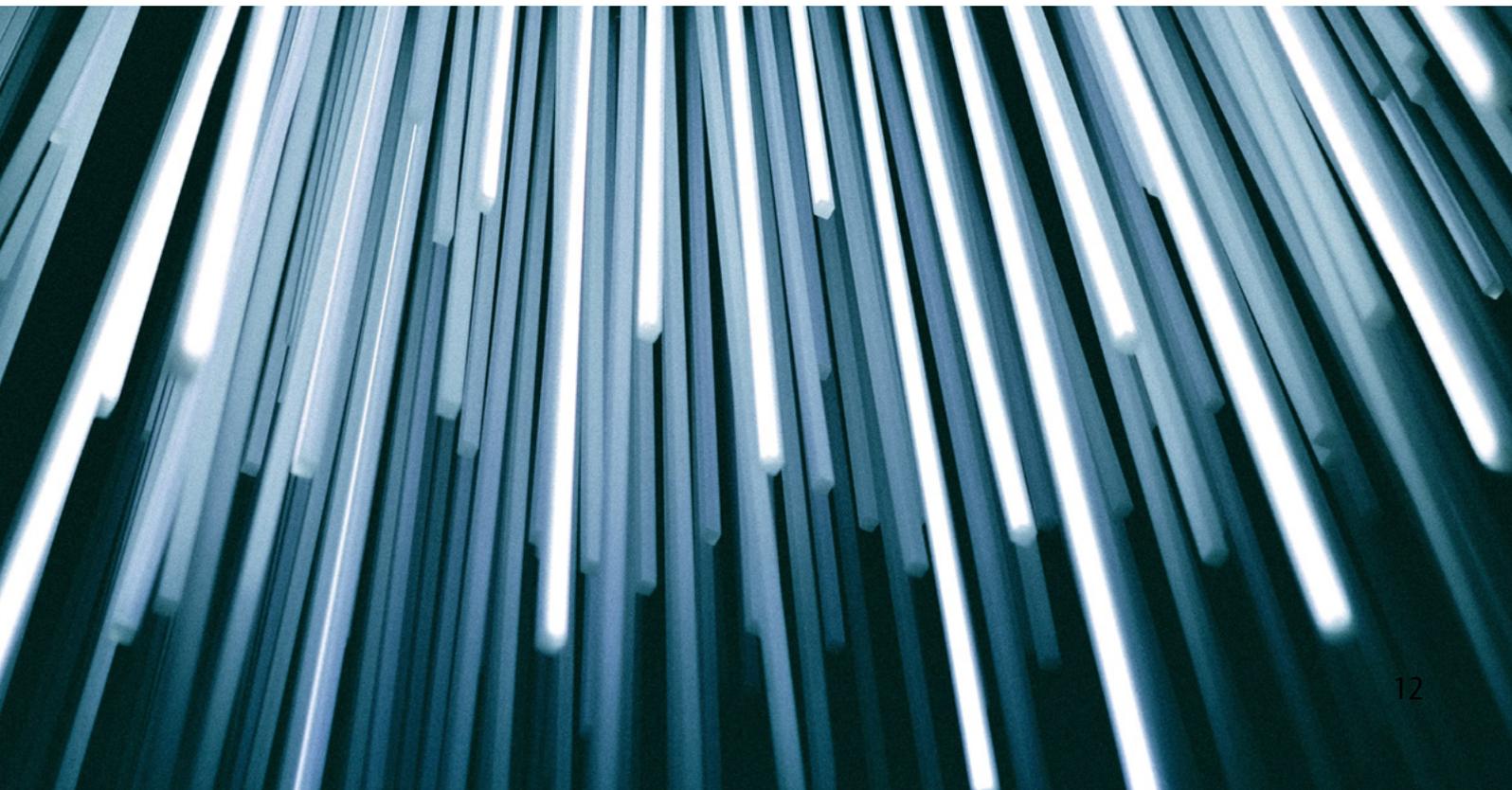
Despite these challenges, the majority of business leaders are positive about what's ahead in the next five years (74%). But critically, just one in four of the public agree with this bright view of the future (25%).

This represents a significant tension between public and private sector organisations and their employees, customers and the public – and should be an important consideration going forward.

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**Transparency and positive communications will play an increasingly important role in how businesses relate to a discerning and nervous public.**

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# The trouble with tech

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**The public is generally positive about how technology can change life in Ireland – and is eager to ensure the country doesn't miss out because of a slow rate of adoption. But nevertheless, many citizens are unsure and even uncomfortable about certain technologies. It's up to public and private sector organisations to guide citizens through, balancing speedy implementation with education, so that everyone can share the benefits of technology.**

Technology is a pivotal driving force, impacting and underpinning much of the wider change in Ireland. But the public has a complicated and nuanced view on technological change.

Despite feeling the benefits of new technology in many areas of their lives, citizens still lack an understanding of the innovations around the corner – and are nervous about their impact. Nonetheless, the general public remains keen for organisations to adopt and offer the latest tools.

As the public and private sector forges ahead with transformation, business leaders will need to consider how change is implemented to ensure it works in everyone's interests.

## Tech and change

Citizens and organisational leaders are in agreement that technology has been a good thing for Ireland. Three quarters of business leaders say that technology has positively impacted their organisation (79%). Meanwhile, the majority of citizens say that technology has created the most positive change of any developments in Ireland (50%) and that it has improved their daily lives (60%).

The rising influence of technology can be seen in levels of investment in the last five years. Organisations have invested an average of €671,874

in digital technology, including emerging technologies such as biometrics (52%), artificial intelligence (42%), and robotics (34%).

Technology has helped to transform areas including service delivery (63%), product innovation (60%) and financial operations (54%). Leaders believe that the performance of digital projects has been mixed, however, with less than half deemed successful (44%).

Beyond the business world, citizens consider the greatest positive impact of technology in their personal lives to be improvements to their education and overall knowledge (68%), followed by their relationships with family and friends (52%) and their career (49%).

Whether at work or at home, technology has become so central to life that one in three Irish people admit they could not live without it for more than three days (30%) – and 5% couldn't live without it at all.

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**People are most excited about the changes to their everyday lives such as a better network to perform their daily tasks.**

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## Getting to grips with tomorrow's tech

Both business leaders and the public already have an idea of how they will use technology in the future. Considering their investments over the next five years, the technology that's on the radar of most business leaders is artificial intelligence, with 36% planning to use it.

Similarly, business leaders believe that artificial intelligence will transform their organisation the most (36%), followed by 5G (34%) and virtual reality (24%).

The public is more enthusiastic about 5G, with the majority (58%) planning to adopt the technology in the next five years. People believe that this new wave of connectivity will have a positive impact on their personal lives, improving the way they access entertainment (36%), shop (21%) and bank (21%).

The next most popular technologies are electric vehicles (54%) and 3D printing (37%).

## Citizens' uncertainty

There are signs that the public doesn't fully understand new technologies and their future role in Ireland. The majority of people say that they simply didn't know enough about technologies like quantum computing (57%), blockchain (55%), augmented reality (50%) and artificial intelligence (44%) to assess whether they will benefit the country.

Interestingly, there are some technologies that citizens are not prepared to use – ever. Almost a third say they will never adopt driverless vehicles (29%), cryptocurrencies (24%) and drone technology (23%).

The public seems to have a limited comfort zone when it comes to trusting new technologies. A third of respondents say they would be happy to be picked up by a driverless car (36%), while just one in four would

happily put their child into a driverless car on their own to get to school (23%).

There are similar sentiments when it comes to robotic assistants, as 50% of the public would be open to owning and using a robot for tasks like housework, while only 23% would let an assistant care for their child.

These attitudes underline the fact that excitement about technology is one thing, but educating consumers and building up enough trust to use it is another.



## Attitudes to adoption

Despite some concerns about individual technologies, over half of Irish citizens want organisations to get faster at technology adoption (52%) – compared to 10% who are happy with the pace of change.

This seems to come down to the fear that Ireland will miss out on the benefits of technological innovations, because organisations are too slow to adapt to them (46%).

Most organisational leaders agree with this need for speed. Two thirds believe that technology is vital to the future success and health of their organisation (68%), while 39% are worried they could miss out on the benefits of innovation because of inadequate planning.

But despite this hunger for faster adoption, the majority of leaders state that public or consumer nervousness has stopped their business from adopting certain technologies in the past (46%).

And it's true that the wider public is concerned about elements of technological change. Considering their biggest worries, citizens point to:

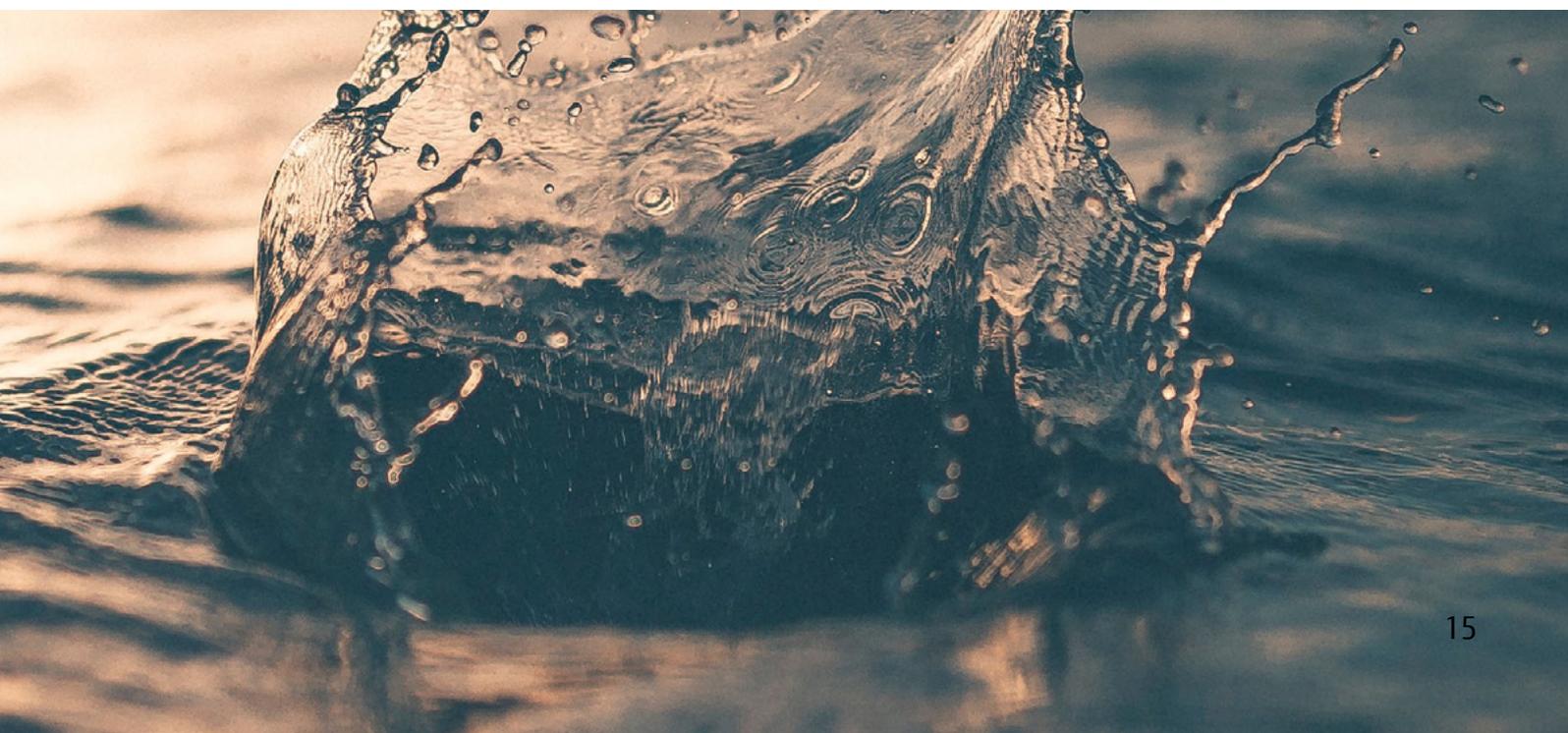
- **Security concerns relating to the sharing of personal data (42%)**
- **A lack of trust in organisations' use of personal data (39%)**
- **A lack of education about how to best use technology (36%)**

The privacy and security of data is clearly a major concern, which in some cases reflects people's personal experiences; a quarter of Irish citizens have had their personal data lost or stolen (26%).

Nonetheless, the majority admit they don't read the terms and conditions on data online (51%), so are perhaps relying on businesses rather than their own actions to protect their information.

Both organisations and the public share a concern that we may become too dependent and trusting of technology. The majority of citizens are worried society is becoming too reliant on technology (55%), compared to just 15% that disagreed.

And alongside their eagerness for transformation, even business leaders fear that their organisation has become too reliant on tech (46%).



# A future based on trust

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**There's a consensus between the public and organisational leaders that organisations have a role to play in driving positive change, and an expectation that government, businesses and technology companies will work together to ensure Ireland succeeds. But organisations aren't sure about what's around the corner and how to navigate the change ahead. Equally, the public is picking up on their uncertainty and is worried about their ability to cope. To foster greater comfort and confidence about the future, change is needed in the dynamic between organisations and the wider public.**

Given the extent of the transformation we're experiencing, there are a wide range of views about our readiness for change and who is responsible for driving it. Organisations and the public see further change coming – and there are doubts about whether Ireland will be ready.

What's clear is the desire for strong leadership, and a balance between business and government to navigate the years ahead.

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**With more large scale change inevitable, flexibility must be at the heart of all change.**

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## Are organisations ready?

Business leaders are well aware that there's change to come – and they are trying to plan for the impact on their organisation.

Three quarters of leaders expect their organisation to experience more change in the next five years than in the previous (73%), and two thirds believe the ability to plan for change will be vital to their success (65%). In anticipation, three quarters of organisations (74%) say they have a plan in place to navigate radical change.

Many organisational leaders appear initially confident they can succeed. Nearly three quarters agree that their employees are prepared to take advantage of change in the future (73%).

However, beneath this confident exterior, leaders admit to some doubts about the future. The majority admit that socio-political uncertainty makes it difficult to plan (52%).

Equally, most admit that they cannot predict what their customers will want (41%) – or even what their sector will look like (41%) – in five years' time.

And others believe that further transformation will be critical. Almost half admit that in its current form, their organisation will be unable to cope with radical change (48%).

## And what about the public?

The public has mixed views on the future. Considering the changes Ireland is likely to go through, the public is most excited about:

- **The positive impact of sustainability efforts (37%)**
- **New job opportunities (34%)**
- **Improvements on the delivery of public services (27%)**

Learning new skills (26%) and opportunities for financial gain (26%) are also seen to be likely positive developments in the coming years.

Many citizens do feel confident that they can benefit from the changes taking shape in Ireland. Half say that they can personally take advantage of changes in national life (52%), while 46% say they have the skills to make the most of technological change – compared to just 18% who don't.

Nevertheless, there are undertones of nervousness about what's ahead. After worries about financial stability (42%), the public is most concerned about data being used without their knowledge and consent (36%) and lack of progress in sustainability efforts (31%).

Importantly this is followed by a lack of trust in the organisations driving change (27%) – and just a third believe that Ireland's organisations are ready and prepared to embrace radical change (36%).

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## **More than ever before, businesses must listen to customers and service users.**

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And the public is acutely aware of the importance of getting this right. The majority of citizens agree that the way we, as a society, manage the vast changes we're experiencing is vital to the health and success of future generations (61%).

## **Where responsibility lies**

The public clearly recognises the scale and the importance of the changes taking place. But who do they feel is responsible for ensuring that Ireland and its people benefit?

The majority of the public believe that central government holds the greatest responsibility (28%)

for guiding the country through change. This is followed by the public themselves (19%) and technology businesses (18%), with just 9% selecting local government.

This in part reflects the organisations that the public believes to hold the greatest power today. While central (37%) is believed to have the great impact on life in Ireland, this is followed closely by Google (33%) and Facebook (29%).

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## **It is clear that organisations must play a prominent role in guiding the public through this process with responsible leadership.**

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The public was also asked to consider whether that influence is positive or negative. Technology companies are believed to be having a particularly positive influence, with Google (30%) and Facebook (20%) scoring the most highly – compared to 25% for central government.

Public and private sector leaders also point to the importance of technology providers themselves for maximising the potential of new technology in society (34%). However, leaders are also coming to acknowledge the responsibility of their organisations for life in the country, as private sector organisations followed closely at 26%.

Overall, the majority of leaders agree that as an organisation, they are responsible for driving positive change in the Ireland (67%).

# The human touch

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**Organisational leaders appreciate that there are growing demands for social responsibility, but many appear unaware of quite how high the public's expectations are. The public places positive social impact above everything else, and right now there are major trust issues that lead citizens to doubt the intentions of organisations and their leaders and their ability to impact society positively. Organisations must go beyond traditional CSR and put humanity at the heart of their transformation in the years ahead, for the benefit of the country as a whole.**

The public has high expectations about the role of organisations in delivering success for Ireland, and as a result it's important to understand their perceptions of institutions' behaviour to date and where their focus should lie in the future. And when it comes to what an organisation should prioritise, there's a significant gap between the beliefs of the public and those who lead them.

Trust will be critical in the years ahead, but the public has some serious questions about the behaviour of both public and private organisations. These institutions will need to develop proactive strategies in the years ahead, to rebuild relationships with the public and drive positive change for the county.

## Organisations' purpose

The public has clear views about the importance of public and private sector companies to the country. When asked what they believe the primary purpose of an organisation should be, the majority of Irish citizens say to have a positive impact on life in Ireland (40%). This is followed by providing great service to customers (23%).

Younger people also place a greater emphasis on organisations' responsibility to progress society through innovation, which was selected by 18% of 18-24 year olds and 16% of 25-34 year olds.

This differs from the views of organisational leaders. The majority believe their company's primary purpose is revenue generation and making money (20%), followed by providing great service to customers (19%).

The disparity between the views of the public and organisations appears to have grown recently, as most citizens agree that their expectation for organisations to make a positive impact on society has grown over the last five years (38%).

Of course, generating revenue is normally critical to organisations' continued existence – and arguably, by providing employment, delivering services and contributing to taxation, organisations are making a positive contribution to life in the country.

But the public clearly wants more from organisations in Ireland, and this expectation gap could be seriously damaging in the years ahead.

## A loss of trust

Changes in the public's expectations of organisations in recent years might be contributing to an overall loss of trust. The majority of Irish citizens admit that they have less trust in organisations now than they did five years ago (32%) – with 12% saying that they trust organisations a lot less.

There are a range of reasons behind this loss of trust, depending on the organisation in question, but a perceived lack of transparency figures highly:

- **Private sector business: Lack of accountability (48%)**
- **Central government: The public doesn't trust organisational leaders (42%)**
- **Local government: Lack of accountability (40%)**
- **Technology businesses: Data breaches (51%) and inappropriate use of data (49%)**

The majority of citizens believe that the organisations gathering and using personal data should be regulated more closely by the government (66%).

Across the board, most Irish citizens agree that technology developments aren't being governed well enough at all (53%).

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## **An ability to build and maintain trust in what an organisation is doing and how it is doing it will determine its level of success.**

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The public's loss of trust is clearly being felt by many leaders on the ground. Nearly half admit the public trusts their organisation less than it did five years ago (46%). This appears to be a particularly pronounced feeling in Ireland; for context, in the UK this figure is 26%.

## **Demanding more than CSR**

Organisations are trying to respond to the public's rising expectations. Almost three quarters of leaders feel their organisation has become more responsible over the last five years (74%). Individual issues are also coming to the fore, as most are confident that their organisation is taking sustainability seriously (29%).

But despite this, the majority of Irish citizens believe organisations do not truly care about their impact on the world around them (53%). A further third disagree that organisations always have the best interests of the customer at heart (34%).

This might reflect the fact that corporate social responsibility (CSR) has not formed a key part of planning in the past. Nearly a fifth of leaders agree that over the last five years there hasn't been a clear CSR strategy in place in organisations (17%), with a further 37% admitting it deserved more focus.

However, there are also suggestions that leaders believe that the public's demands are simply too high. The majority in fact state that organisations are being put under too much pressure to drive change in society (49%). Three tenths of leaders don't feel that their organisation will ever be able to fully satisfy the public's expectations (31%).

Social responsibility is about much more than an organisation's reputation. Consumers are increasingly making purchasing and employment decisions depending the social impact of businesses – and this is more important to millennial and Gen Z consumers than any others.

Social responsibility, then, is likely to become a key determinate of which businesses succeed and which do not.

# From chaos to clarity

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This report presents two very different views of the Ireland's future. Public and private sector leaders are generally very positive about the change that's happened, and the change that's still to come.

By contrast, much of the public is nervous and uncertain. While they can see a bright future ahead, powered by technology and new possibilities, citizens are unsure of how we'll get there.

Because the reality is that, fairly or unfairly, the changes of the last five years have altered the relationships between organisations and the public – and ultimately eroded trust. The public is relying on institutions to guide Ireland forward, but is unsure they can succeed and wary about their accountability. And the views of these employees, consumers and citizens will have a very real impact on organisations' futures.

Organisations have struggled to respond to change effectively. Now, with greater and faster change on the horizon, it's time for businesses to plan more effectively for their transform in the years ahead. That means recognising and planning for the wider impact of their actions, including the environment, the supply chain and employees.

But it also means carefully considering their approach to technology, which both leaders and citizens agree will be vital to Ireland's prosperity.

The public wants to see technology adopted quickly, to improve life in Ireland and keep the country competitive. But at the same time, citizens want organisations to implement technology responsibly – to explain how it works and ensure that everyone can share in the benefits.

Technology and innovation will be at the heart of change in Ireland, but the way that organisations use and deploy these new tools is critical for rebuilding public trust and ultimately securing commercial success.

Organisations need a radical approach to technology planning, with a strategy that gains the most value from emerging technologies, but equally ensures that humanity is at the heart of every innovation. Transparency – including communicating with employees and the public – is an imperative.

That might seem daunting for leaders – but it's absolutely possible, particularly through expert partnerships. By drawing on a deep understanding of technology, the wider private and public sector environment and how to put people first, organisations will succeed.

These are undoubtedly challenging times, and perhaps more is being asked of our organisations than ever before. But there's also an opportunity for institutions to shape positive change in Ireland, to work with the public and create a more prosperous future.

That is the change that we're excited to see.



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