

2026 Trends that impact sustainability and social inclusion in Ireland

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Introduction

2026: Trends

Achieving a more sustainable and socially-inclusive society is work that requires determined collaboration, dialogue and informed trade-offs between all sections of society – government, business, academia, civil society and more.

As Ireland enters 2026 in a global mood of trepidation, it is important to remain focused on the issues that are within our own control, that are medium - to long-range, and that form the building blocks of a more sustainable future society.

In this paper, Business in the Community Ireland (BITCI) identifies five trends that will shape the future of sustainability and social inclusion in Ireland, through 2026 and beyond. It aims to frame them briefly and evenhandedly, setting out opportunities as well as challenges and highlighting areas where dialogue and collaboration will be most valuable.

The five areas cover:

- Defence and Security
- Housing, Migration and Community Cohesion
- Infrastructure Development and the Natural Environment
- Tech, Energy Demand and the Transition to Renewables
- Human Rights and Decent Work

Given the remit of Business in the Community Ireland, our paper suggests opportunities for business actions – generally voluntary, but with potential strategic benefits – that can create improved societal outcomes. We look forward to the conversations, and to the actions, that this paper will prompt.



1 Defence and Security

What are the issues?

The world is experiencing a historic upheaval in security assumptions and alignments. Global conflict is at its highest level since World War II, with 110 armed conflicts underway at the end of 2025 (i).

Long-standing assumptions about international alliances and guarantees are eroding, with the January 2026 standoff over Greenland emphasising the extent to which the old order has splintered.

The new US National Security Strategy, published last December, crystallises the US's withdrawal as Europe's primary security backstop, and demands that EU allies rapidly raise defence spending to 5% of GDP (Ireland's is currently 0.25%) (ii).

When the European Commission's €150bn fund for defence investments closed at the end of November, it was fully subscribed. Up to €800bn will be mobilised for defence spending in Europe by 2030 (iii).

Countries across Europe, especially to the East and in the Baltics, are strengthening civilian preparedness for possible conflict (iv), as Russian incursions into maritime areas and airspace increase (v) and the US expresses ambivalence about Russian intentions towards Europe (vi).

Ireland has historically been on the margins of European and global security considerations. In this new environment, its limited defence capabilities combined with its strategic technology and communications role, looks like a potential regional vulnerability.



What does it mean for business in Ireland?

Defence and security are likely to become more interwoven with business and policy discourse through 2026. There were signs of this in late 2025 – notably in IBEC’s call on government to give security assurances to business (vii).

Ireland is a hub for multinational technology, finance and advanced manufacturing companies that depend on secure global connectivity – both in physical logistics and cyber. Around three-quarters of all undersea cables in the northern hemisphere pass through Irish marine territory; we also rely on subsea connections for energy imports. As such, the lack of national maritime surveillance and security capability becomes a relevant business concern.

As defence budgets increase, there will be abundant business opportunities to provide defence-related goods and services. In some cases, these will be weapons; more often they will be dual-purpose technologies, cyber security services, or logistical and technical supports. This is a new reality for current generations, and companies looking to compete for defence-related contracts may encounter friction from staff, communities and civil society.

In this new environment, security is also being reframed as a public good. Defence firms, long outside the remit of responsible investing and ESG, are starting to be reassessed. There will be increasing inclusion of defence firms, and firms selling defence-related products, in ESG funds and labelling schemes. This raises ethical considerations and may further confuse ideas about what ESG stands for.

Finally, with increasing areas of the world in conflict or adjacent to conflict, companies with international footprints will face additional requirements around supply chain due diligence and business continuity planning.

What does it mean for communities and society?

The new emphasis on defence poses yet another challenge to getting public buy-in for climate action. At EU and Ireland level, security, deregulation and economic competitiveness are increasingly framed as the hard-nosed priorities. Climate action and other sustainability imperatives risk being portrayed as naïve or unrealistic. There is a challenge to those working for climate, biodiversity and Just Transition to frame these imperatives in a way that cuts through in this environment.

Increased focus on defence in popular discourse has the potential to be politically and socially divisive, given the deep-seated commitment of many Irish people to the principle of neutrality. With information warfare now a standard tool for disruptive actors, the issue is open to manipulation and incitement via social media. Government will have a choice as to whether to attempt to inform and persuade the public, or whether to act ‘discreetly’ but risk accusations of bad faith.

As conflict becomes more prevalent around the world, many people will be left with little choice but to look for safer locations. Fear of conflict will influence those with the means to consider pre-emptive relocation. As such, the issue of migration into perceived safe countries like Ireland is unlikely to diminish.

Housing, Migration and Community Cohesion

What are the issues?

Ireland's headline economic figures paint a picture of relative prosperity, yet social discontent remains prevalent. Housing shortages, high living costs and overstretched public services coincide with – and have in some cases been exacerbated by - a decade-long surge in immigration.

Ireland's population has grown from 3.5m to 5.5m in the past 35 years. In the decade since 2016, this has been driven strongly by net migration, with average annual arrivals of 65,000 (and over 100,000 in most years since 2021). Countries of migrant origin have changed in that time, with many more people coming from outside the EU (viii).

There is a national housing shortfall of up to 256,000 dwellings. The Department of Finance has stated that the housing crisis will likely persist for another 15 years, with demand growing until the early 2030s. Average house prices rose by 91% from 2015 to end-2024, and open market rents by 78% (ix). The situations of many people in rental accommodation are increasingly precarious. 41% of people in rented accommodation are in poverty or at risk of poverty after rent is paid (x). Over 16,000 people were in emergency accommodation at the end of last year – more than double the number in 2015 (xi).

Meanwhile, a surge in population has not been matched by an increase in health and education provision. There are persistent teacher shortages. GP numbers have grown by a third of the number needed to maintain patient load at the level it was a decade ago (xii). In the past two years there has been an upsurge in anti-migrant sentiment on- and offline, and in projections of more narrowly-defined nationalist identities. This has at times spilled over into social unrest. Frustrations over housing, prospects for young people, and quality of life have been conflated with the more visible presence of immigrant communities. Tensions have been exacerbated as many of those seeking international protection have been housed in economically disadvantaged areas of Dublin and in small provincial towns. Economic migrants also tend to gravitate towards these relatively affordable locations, placing further pressure on local services and infrastructure.

The country is at a crossroads and must find a way to balance labour needs, humanitarian responsibilities and social stability.



What does it mean for business in Ireland?

In-migration is an inescapable reality if Ireland is to meet housing and infrastructure needs, balance its demographics, and provide healthcare and retirement obligations for an ageing population.

The Fiscal Advisory Council estimates that up to 80,000 additional workers are needed to meet housing and wider infrastructure targets (xiii). Other sectors increasingly reliant on migrant labour are health and social work, and technology and communications – the top two sectors for non-EU work permits. Employers therefore face the complex situation of needing to recruit overseas workers to build houses and provide services, knowing that those workers will themselves need accommodation and services. They will potentially also face a less welcoming society.

For skilled and highly skilled vacancies, companies will continue experiencing rejections by some international candidates due to concerns about accommodation and affordability. If social tensions are not managed effectively, employers may also have to address candidate concerns about safety and wellbeing. With progress likely to be slow in addressing housing and public service gaps, some companies may need to provide accommodation directly. They may also face higher expectations to provide more benefits to workers and their families.

Social tensions risk surfacing in the workplace in the form of polarised discourse, political organising, and physical and mental health impacts arising from socio-economic stresses. All of these will require companies to develop robust policies and staff supports, and demonstrate inclusive leadership.

There is opportunity for companies to do more through targeted community and social investment, replacing short-term charity support with longer-term partnerships and coalition-building in support of meaningful social impact. There is also space for more business advocacy for policy solutions that can uplift all – for example around urban regeneration, tackling dereliction and creating quality jobs.

What does it mean for communities and society?

Attitudes in Ireland towards refugees and immigration have improved significantly since 2010 and remain largely positive, both in historical comparison and when contrasted with other European countries (xiv). There remains a significant difference between the organised and virulently aggressive anti-migrant sentiment spread on social media and the genuinely held attitudes of most people.

However, migration is now a political issue in a way it has not been previously, and we only need to look at the UK to see how concerted populist campaigns can lead to a rapid hardening of positions. It is also easy for moderate people to be cowed into passivity by thinking that aggressive sentiments are more widely held than they are.

Government, business and other societal actors have a vital role at this juncture. They can speak up to promote balanced narratives centred on solidarity, fairness and inclusion. And they can support thriving community, sports and cultural foundations that improve quality of life across the board, while giving migrants a positive framework in which to integrate.

Infrastructure Development and the Natural Environment

What are the issues?

The status of natural ecosystems in Ireland is an ongoing cause for concern, and it will require concerted multi-actor efforts to turn around the current stark picture. Recent surveys show that 85% of Ireland's protected habitats and almost one third of protected species of flora and fauna are in 'unfavourable' condition and continuing to decline (xv). Over half of native plant species are in decline and more than 50 bird species are of high conservation concern; 48% of surface waters are of moderate, poor, or bad ecological status.

At the same time, significant infrastructure upgrades are needed to keep up with increasing demand and underpin social stability and competitiveness. Ireland's capital stock is 25% lower than the average for a high-income European country, with four key areas of deficit: housing, health, transport and electricity (xvi). The government last year set out more than €275bn of infrastructure spending planned by 2035 (xvii).

The progress made on key infrastructure development will influence whether growth in population and economic activity can be managed and smoothed, or whether they exacerbate areas of tension and dysfunction. But our declining natural environment will be further threatened by development that does not sufficiently take account of biodiversity needs.

Government reforms are targeting more streamlined planning rules and centralised decision-making authority, with possible new limitations to public participation and judicial review (xviii).

However, despite the evident importance of upgraded infrastructure (including, ultimately, for greener transport and energy infrastructure), there is a balance to be struck. It will be important that infrastructure needs do not override or dilute legitimate environmental concerns, and that there are fair channels for public-interest environmental cases to be made.



What does it mean for business in Ireland?

There are particular considerations for companies that will be involved in the development of new national infrastructure. As regulatory requirements are streamlined and limitations potentially placed on public objections, companies will benefit from taking a proactive “licence to operate” approach. This puts the onus on meaningful consultation, community partnerships and social value creation to mitigate risks of social tension and disruptive action. Nature and the environment can be key elements of this.

At BITCI we increasingly see leading Irish companies taking a voluntary interest in Biodiversity Net Gain principles (xix) (whereby developers deliver at least a 10% increase in biodiversity compared to that which is disturbed by the project). Lessons from other countries show that Net Gain is most effective when the gains are local to the project and meaningful to nearby communities – rather than an ‘offsetting’ approach that funds projects in other regions.

Moreover, as physical effects of climate change begin to manifest more strongly, the relationship between climate and nature will become more apparent. Companies delivering infrastructure can help to future-proof developments and reduce the risk of community backlash by working with nature. Practices such as hard landscaping, canalisation of waterways, degradation of wetlands and dunes will all reduce natural shock absorption, while nature-positive approaches can in many cases support climate adaptation and infrastructure resilience.

It is true that the big picture for nature in Ireland is disheartening. But nature can start to recover quickly, and companies have the possibility to make meaningful local improvements within timeframes that are motivating for staff and communities. Initiatives such as wetland restoration, pine marten recovery, Hares’ Corner projects, or the incorporation of artificial reef habitats into undersea infrastructure, are all tangible examples of positive progress (xx).

What does it mean for communities and society?

In an atmosphere of generalised frustration at the speed of infrastructure progress, environmental concerns can be framed in parodic terms; the roads delayed or the homes blocked because of concern for bats or toads. But the dichotomy of people vs nature is a false and dangerous one.

The value of nature to society, and of incorporating nature into public developments, should not be underestimated. Research in Ireland and the UK has shown that connecting with nature makes people feel happier, less stressed and more motivated to be active (xxi) (xxii). However, this too is an area of social inequity. Across Europe, there is “less and lower quality green space typically found in communities of lower socio-economic status (xxiii).

Notably, “Public Acceptance” is a main pillar of Ireland’s new Accelerating Infrastructure Report and Action Plan, published last December (xxiv). Foregrounding nature and linking infrastructure development to personal, societal and environmental wellbeing – rather than cost, imposition and disruption – should be a key element of this.

4

Tech, Energy Demand and the Transition to Renewables

What are the issues?

Ireland is at the heart of Europe's ICT industry. Sixteen of the twenty largest global tech firms have European HQs or key data infrastructure here (xxv), and Ireland's 89 data centres represent around ten times the European per-capita average (xxvi).

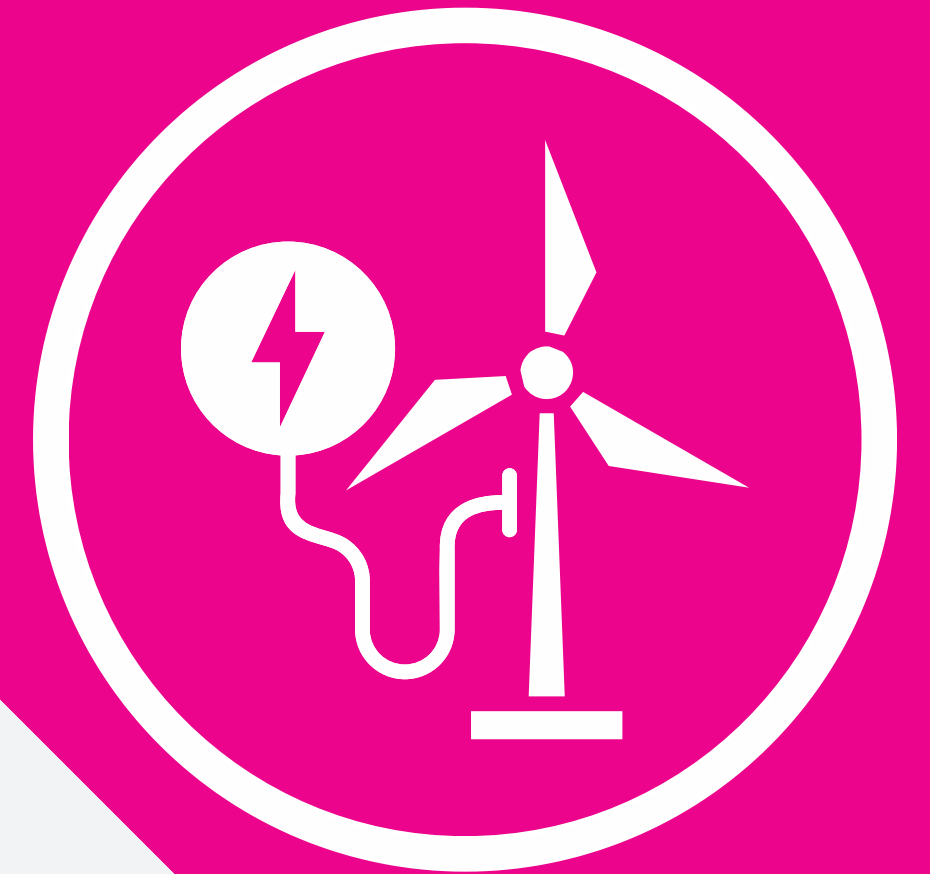
The surging AI-driven demand for data centre capacity means that data centres will account for up to 30% of Ireland's electricity supply by year-end (xxvii) (the next highest is the USA with 3.5%) (xxviii).

At the same time, while Ireland is making progress towards renewable energy targets, it is not moving fast enough. The parallel consumption increases and connection requirements arising from data centre demand risk creating an impression that we are running to stand still.

There is industry appetite for more data centre construction (notwithstanding the pause on new connections in and around Dublin until 2028) (xxix). At the same time there are challenges to the rapid scaling of renewables. Ireland currently has a little under 2 GW of solar capacity, with a 2030 target of 8 GW. The pace of growth there is largely on track (xxx). But offshore wind capacity has lagged significantly, with the target of 5 GW by 2030 looking out of reach, and an unclear pathway to the 2040 goal of 37 GW. There is also insufficient grid capacity to fully absorb even the current rate of renewable generation.

There are many knock-on issues in play here. One is whether green energy will be able to power decarbonisation through electrification of transport and industrial processes – in line with government and private sector targets. This is material to Ireland's ability to meet its binding EU climate targets by 2030 (xxxi). There is also the politically thorny issue of household energy costs.

While data centres undoubtedly deliver economic benefits and will be a long-term part of Ireland's business landscape, these interlinked issues raise questions as to whether and in what scenarios they can deliver a net return to society.



What does it mean for business in Ireland?

The questions around data centres and AI are challenging, because the sector is integral to innovation and competitiveness in the Irish economy. The questions are still being defined, and necessary accommodations between the sector and wider society may well evolve over time. Examples such as the Tallaght district heating scheme that runs on waste data-centre heat provide models (xxxii). Discussions about the circumstances in which new data centre connections can be authorised are taking in options such as interruptible supply schemes, whereby data centres would give way to other customers during periods of high demand.

Responsibility for data centre energy demand lies with demand drivers as well as centre operators. AI adoption will be a major demand driver. But companies that integrate AI into their operations and services will increase their emissions profile and wider environmental impacts. Moreover, they run the risk of backlash if their AI adoption drives energy use without achieving wider efficiencies, or without improving staff and customer experience. Holistic climate transition planning, designing integrated approaches to responsible technology use, energy planning and climate action, will be crucial.

On the wider question of green energy supply and grid capacity – across sectors, most companies have goals to reduce their direct and indirect carbon emissions. This relies on them (and their suppliers) being able to source renewable power for their sites and offices, and to electrify processes such as manufacturing, heating, cooling, and transport.

Progress will be slower without sufficient increase in green energy available through the grid. This may see larger companies with ambitious commitments taking on more direct responsibility for emissions reduction, by contracting their own renewable energy through private Power Purchase Agreements (PPAs). It is possible too that future data centres could have direct connections to generation sources – such as biomethane plants – rather than being grid-connected.

What does it mean for communities and society?

Household bills are the sharpest way in which people experience issues in the energy sector. Rising power demand requires larger and more complex energy infrastructure, driving higher system costs that are a factor in driving higher consumer energy bills (xxxiii). The scale of demand associated with data centres can create a perception of direct correlation between tech sector growth and household costs (xxxiv).

EU polling indicates strong public support for greater sectoral transparency, with 85% of respondents calling for disclosure of data centres' environmental impacts, energy use and energy sourcing (xxxv). These concerns have become visible in public action, including “Energy for Who?” protests (xxxvi).

The government and tech companies will want to avoid a perception that AI and data centres are at odds with the national good. The sector contributes ~18% of Ireland's gross value added and employs more than 106,000 people, (~4% of the national workforce) (xxxvii). Many of these are highly skilled and high taxpayers. But if the right balance is not found, or trade-offs not communicated well, companies may well find themselves facing increased opposition.

5 Human Rights and Decent Work

What are the issues?

2025 and early 2026 have seen the rapid and ongoing dissolution of international institutions and permanent alignments – for example in the much-reduced role of the UN in addressing conflict situations, and the withdrawal of the US from multiple multilateral agreements.

In their place are coming more ad hoc arrangements and transactional decision making. In some cases, “coalitions of the willing” may be positive – for example, the post-COP 26 efforts to advance action on fossil fuels and deforestation, even in the absence of an international consensus. In other cases though, the peer encouragement is more problematic. This is particularly evident in trends to normalise lower, or differentiated, human rights standards. Increasingly, this is apparent in reduced institutional protections and wilfully increased hostility towards refugee and migrant communities.

It is also apparent in a labour context. The 2025 annual Global Rights Index found a “stark and worsening global crisis for workers and unions.” Average country ratings deteriorated in three out of five global regions, with Europe and the Americas recording their worst scores since the Index began in 2014.

The report notes that “the data shows a sharp escalation in violations of fundamental rights, including access to justice, the right to free speech and assembly, and the right to collective bargaining. ... [A] growing number of state authorities are adopting legislation that criminalises civil society organisations – and, potentially, trade unions [...]” (xxxviii) Meanwhile, the CSRD and CSDDD - EU Directives that sought to operationalise key human rights instruments such as the UN Guiding Principles on Business and Human Rights - have been significantly diluted.

There is still often an idea that human rights not a domestic issue for Irish business. But the environment has changed markedly over recent years with factors such as new and potentially vulnerable migrant communities, zero hours contracts, labour shortages, the housing crisis, and the cross-border spread of organised crime.



What does it mean for business in Ireland?

CSRD and CSDDD requirements may have been weakened, but systematic risk-based due diligence still a key tool for responsible businesses and governments. In a climate where formal human rights programmes and civil society support for vulnerable groups are being defunded, we are likely entering a more volatile time where scandals will be triggered by media investigations or whistleblowing through social media. Effective due diligence will help companies avoid surprises and demonstrate sectoral leadership.

One area where legislation is strengthening, and having real-world impact, is in Forced Labour bans. Recent US trade agreements have included strong clauses on elimination of forced labour in supply chains. The EU Forced Labour Regulation is in the process of being implemented across member states, to take full effect in 2027; there is also a spate of due diligence legislation emerging in Asia Pacific. This again highlights the need for effective due diligence for companies trading across borders.

Much of the logic that currently drives companies' supply chain engagement and purchasing behaviour assumes a predictable environment, where buyers have optionality and can drive low margins and responsive delivery. But global volatility is increasing, and factors as diverse as tariffs and climate extremes can disrupt supply chains as well as having potential knock-on effects for human rights.

Companies may now start to see increasing benefit now from longer-term relationship building with suppliers, that focuses on consistent standards and identifies mutually-beneficial ways to improve supply resilience. This will also improve the feasibility of effective due diligence and help to manage human rights risk. Responsible governments can lead by example if they integrate human rights into public procurement and support the development of good practice and pooled resourcing for due diligence.

What does it mean for communities and society?

Decent work, secure work, and labour rights have meaning for the general public even where terms such as Sustainability or CSR fail to resonate. They want this for themselves and their families, and employers in Ireland should be mindful of the potential cumulative human rights impact of trends such as mismanaged workplace AI, app-based work and casualisation of employment.

As consumers, people also have an interest in the rights of the workers who produce their goods. However, this can be obscured in an environment where living costs are high and consumer focus is on prices for groceries and other goods. Anger at price rises is often directed at retailers and governments, without dialogue on the climate and human factors that can affect them. This has been the case for example with cocoa and chocolate through 2025.

As global instability rises and climate impacts increase, human rights will be threatened in many different ways. Companies should consider how a stronger public understanding of supply chain realities and the people behind the products on shelves may help to inform future dialogue with better-sensitised consumers. This could help both to smooth supply shocks, and increase demand for more transparently and responsibly produced goods.

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At Business in the Community Ireland (BITCI), we bring together business, government, and communities to make a real difference in sustainability and social inclusion.

We provide collective action platforms, expert advisory, events and closed-door dialogues. Through these, we build business capability and help companies to solve their sustainability problems and meet their targets – in ways that keep social inclusion front and centre.

This paper was written by Laura Morrison, BITCI Head of Responsible Business, with contributions from our Sustainability Advisers across the Responsible Business Team.

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