



EY

Building a better
working world

Delivering Digital Enabled Home Health

November 2020



Connected**Health**

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Executive summary

Digital-enabled home health care

Digital-enabled home health care

We are entering an era of transformational change in health care. Driven by an aging population, shifting power dynamics within the value chain, increased demand for services and changing consumer expectations, a new health ecosystem is emerging.

To succeed in this new ecosystem, organisations must adopt a new mindset and broader perspective, and embrace a new dual pathway to growth. A pathway that takes into account the changing business reality of today and the emerging opportunities of tomorrow.

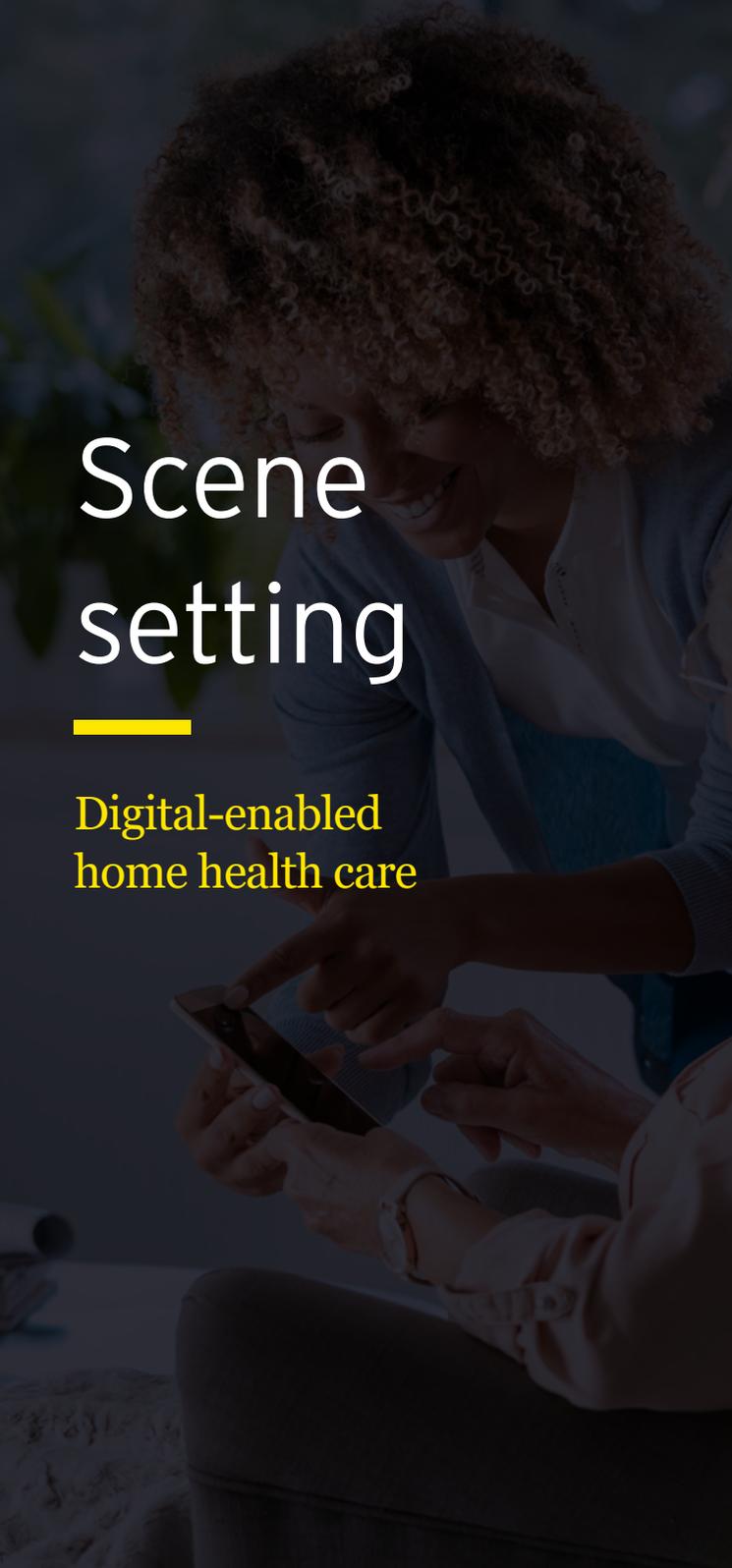
Traditional health systems are under pressure from rising costs, growing consumer expectations and new technologies. The future of health care lies in bold changes to business models, policies and funding strategies that enable consumers to play an active part in their own digital health ecosystem.

As digital health moves from future to current state, health providers and payers confront a rapidly transforming landscape. Succeeding in the digital health ecosystem may require changing not only how health care organisations operate, but how they view the world.

Health care spending is on an unsustainable trajectory, thanks to demographic shifts and globalisation. As a result, health systems are focused on sustainability and outcomes driven by value, as they strive to balance three fundamental imperatives: expanding access, improving quality and managing costs.

Health providers can thrive in the transformative age by embracing business intelligence solutions, new technology and advanced analytics capabilities to bridge the gap between data and actionable insights. Doing so will allow providers to improve the quality of care; reduce fraud, waste and abuse; drive down costs; deliver care in new ways; and enhance the patient experience.

In this report, ConnectedHealth and EY Ireland discuss the drivers that are providing and delivering digital-enabled home health care, the key benefits, and why it is important for health care providers and private sector organisations to support the acceleration of this effort.



Scene setting

Digital-enabled home health care

Demographic

Ageing is inevitable. With today's longer lifespans, we have the potential to age better than ever before. Chronological age is losing its power to define us, with ageism considered a prejudice against the future self.

The average life expectancy in Ireland is 84 years for women and 80.4 years for men. The number of people aged over 65, continues to grow, a trend which has implications for future planning and health service provision and delivery:

- ▶ People aged 65+ make up 12.7% of the population and 53% of hospital stays
- ▶ People aged 85+ represent 1.4% of the population and 13.5% of hospital stays

The COVID-19 pandemic

The COVID-19 outbreak has emphasised the absence of alternative options to nursing home care and generally the need for change in elder health care. Multi-occupancy rooms and outdated premises in some nursing homes pose challenges in protecting residents against infections such as COVID-19.

With the aging population increasing and the number of hospital beds decreasing, the number one choice for people to advance their years at home is with health care delivery provided at their doorstep.

Chronic disease

The trend for chronic disease to affect affordability of health care is world wide. Emerging technology and ecosystem networks make it increasingly possible to drive early interventions to better manage health outcomes and risks.

New solutions

Health care organisations are increasing the provision of quality hospital care to acutely sick older persons in their homes, improving outcomes, reducing health care costs and enhancing the person centred experience - safety, quality, and satisfaction. In countries such as the UK, Australia and the US, it is referred to 'hospital at home'. In Ireland, some models of health care at home are available through private health insurance and private providers. Vhi provides an accredited consultant-led hospital in the home service for its customers. Laya healthcare offers a nurse-led home care under the direction of a hospital consultant.

Providing hospital level care in the home takes pressure off acute hospitals by freeing up beds in the hospital system. More importantly, people prefer to be treated in the comfort of their own home with their family and friends around them.

VHI estimates that from 2010 to 2017 more than 6000 customers in Leinster were treated in their homes instead of hospital, equating to a saving of 78,000 hospital day beds and a claims cost of more than €27m.

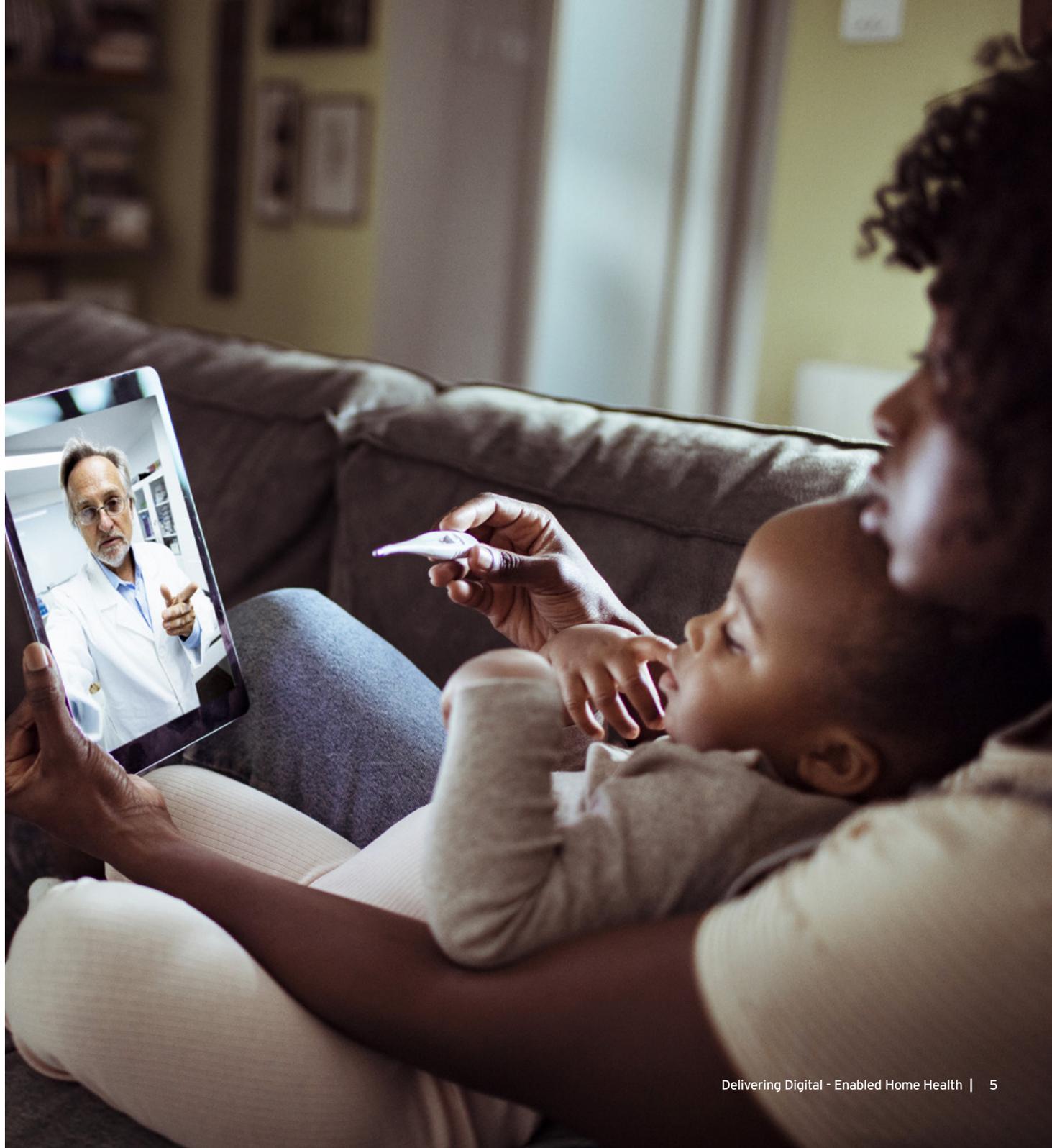
Digital-enabled home health care

Digital-enabled home health care is an evolving market, with a range of services that use cutting-edge smart technology and devices like assistive technology, telemedicine, mhealth and rehabilitation, all designed to deliver, maintain and improve care in the home.

The key benefits are:

- ▶ Bridging the gap between individuals and their care providers
- ▶ Allowing the demand for care to be achieved at affordable cost

People can live better quality lives in their home environment and live longer with guided preventive and self-management techniques. Care givers can be supported to provide and better carry out care using telemedicine technologies, which is becoming a major part of digital home health care for telemonitoring of people with chronic conditions, teleconsultations for the less mobile and fall protection and alert services for older people. Broadly speaking, digital-enabled home health care will benefit all those with health care needs in society.



Traditional models

Digital-enabled home health care

Nursing Homes

There are approximately 585 nursing care homes (443 private and 142 public) in Ireland providing long-term care to 31,969 people, with almost €1 billion per year spent on the Fair Deal scheme alone. The gap between home health care and hospital and nursing home care is seen as a place where alternatives can be found, examples include new graduated step levels of care and wider societal solutions like smart homes. Home health care is viewed as an attractive solution in the midst of the COVID-19 crisis as it keeps vulnerable, older people out of higher risk settings.

Nursing care home environments bear some similarities to both the home (residential nursing home care) and the hospital (long-term nursing home facilities) in terms of presenting risk of infection. In the home, residents share space and engage in activities that bring them into daily contact with a relatively constant group of individuals. In hospital, the pool of potential contacts is large and includes clients who have received extended antibiotic therapy.

The nature of infections such as COVID-19 can make it difficult to prevent and contain in long-term nursing home care environments, with people in them disproportionality likely to contract it given that their health is more vulnerable. Lower respiratory tract infections and urinary tract infections occur in nursing care homes with a frequency equal to that seen in acute hospitals. In addition, bacteria, resistant to antibiotics can cluster in individual units among clients with invasive supportive mechanisms, for example, urinary catheters. These individuals can serve as a source of infection as well as be at higher risk when admitted or readmitted to hospitals.

Many nursing homes operate as medical institutions

There are challenges with the current nursing home model and many are not homely. The nature and evolution of long-term nursing home care is based on a medicalised model developed within a medical culture. Even though a nursing home is profoundly limited in the type and amount of medical care it actually offers, it still functions as a medical institution, medicalising the person's life. The ethos of long-term care environments is intended to be homelike - not sterile and antiseptic. Most are not equipped to provide basic medical care like parenteral administration of antibiotic therapy, which usually necessitates hospital admission.

Home care packages

The Cash for Care Programme, first launched in Ireland in 2001, is a precursor to the current trend towards home care packages. It was introduced to strike a balance between institutional care and care provided in the home and community. The Health Service Executive (HSE) has operational responsibility for planning, providing and delivering home and community based support services. It is estimated that 20% of the population aged 65 years and over, receive these services. They include home help services, home care packages, nursing and therapy services, short stay residential care, day care and meals on wheels. Services are delivered either directly by the HSE, or on its behalf by private and voluntary not for profit providers. Unlike other European countries such as Scotland, Netherlands, Sweden, and Germany, home care and support services for older people in Ireland are not subject to regulatory oversight in the monitoring of the quality of care delivered.

Change drivers

Digital-enabled home health care

Incentivising home health care

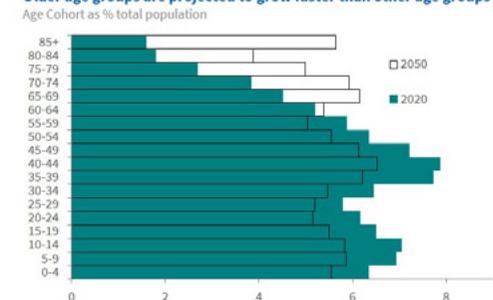
The shift to virtual health during the COVID-19 outbreak, demonstrates the role technology can play in freeing up resources and capacity in hospitals while caring for people at home.

Enabling people to stay at home for as long as possible needs to be advanced through new funding models. A state of the art integrated model of community care and acute care is required, functioning as a testing ground for technologies like robotics, smart homes and artificial intelligence to enhance day activities and mobility, meals in and out of home, independent living objectives and outcomes, home health care and enhanced home health care. A different design philosophy is needed that considers the application of technological innovation and health care, supporting and enriching the provision and delivery of home health care with human connection at its core.

Aging populations

Around the world, the health sector is being reimaged in the face of aging populations, increased prevalence of chronic diseases, growth in emerging markets and shifting reimbursement models. The COVID-19 crisis has also produced a strong impetus for healthcare organisations to address these challenges through accelerating their need to adopt and master the digital innovation that offers both opportunities and threats. Technology empowers patients, real-time analytics improves care and enables a mind shift towards prevention, opening the door to new non-traditional competitors.

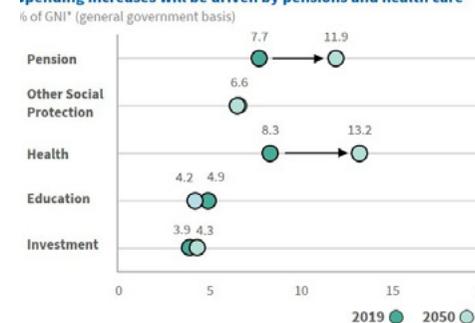
Older age groups are projected to grow faster than other age groups



The rise in public spending on health and pensions primarily reflects an ageing population. Older people will represent a higher share of the population, with the share of ages 65+ increasing from 14 per cent in 2020 to almost 27 per cent by 2050.

Sources: CSO; and Fiscal Council projections. Note: The bars are in terms of shares of 5-year age cohorts, except for the 85+ age category. The underlying total population is 4.9 billion in 2020 and 6.0 billion in 2050.

Spending increases will be driven by pensions and health care



The increase in government spending as a share of GNI* primarily driven by areas affected by ageing and high health costs.

Under current policies, government spending on pensions would rise from 7 per cent of GNI* to 11.9 per cent in 2050. Health spending would rise from 8.3 per cent to 13 per cent.

Sources: Eurostat; CSO; Department of Public Expenditure and Reform; Department of Finance; and Fiscal Council projections. Note: Pension includes public sector pensions; Health includes long-term care.

Source: (2020) Long-term Sustainability Report - Fiscal challenges and risks 2025-2050 (Irish Fiscal Advisory Council)



National Healthcare strategies - Sláintecare

Improving the digital capability and capacity of healthcare providers and how technology can support people to experience better health and social care is a priority for Irish Healthcare leaders.

It is an enabling component of the Department of Health's Sláintecare long-term plan to provide a Pathway to Universal Healthcare in Ireland. At the heart of the plan is reorganising care out of hospitals and into the primary care, and community and home settings.

A €20 million Integration Fund has been committed this year to test and scale ideas that demonstrate the Sláintecare goals of the right care, delivered in the right place and at the right time.

Sláintecare's ambition is to provide as much care as possible, close to home, in alignment with the national Integrated Care Programme for Older People.

Under the plan, a number of national initiatives are being supported, helping older people to:

- ▶ Better manage their own health and wellbeing
- ▶ Prevent being admitted to hospital in the first instance
- ▶ Come home from hospital quicker, limit readmission to hospital and remain living independently at home

Healthcare policy in Ireland is moving towards a digital enabled person centred home health model. The initiatives bring together ideas around care for the older person, putting the older person first and foremost at the centre of activities to support:

- ▶ Positive health and wellbeing outcomes for them and their families
- ▶ Wider hospital healthcare system

A woman with short white hair, wearing a white lab coat and glasses, is looking down at a smartphone she is holding in her hands. The background is a blurred indoor setting, possibly a home or a care facility.

Client Testimonials

Digital-enabled home health care

What people and families want

For many families, home health care can be just the support they need to help manage caregiving responsibilities while avoiding caregiver burnout. People who have travelled to and from hospital can find the experiences to be stressful, with the majority attributing their stress to parking, public transport, distance travelled and associated costs.

The vast majority of healthcare is still delivered in a traditional hospital setting. While convenient for the healthcare professionals providing the services, hospitals are often not the most appropriate or preferred locations to receive care for people.

ConnectedHealth is one of the largest providers of homecare services in Northern Ireland with clients who testify to the importance of technology in enabling home health care.

“

My carers know when I've had restless nights and are able to check on me to see if there's anything wrong if there is unusual activity levels, I know someone cares and checking in on me.

Client about PacSana

“

Easy to use, we don't have to remember key codes anymore, it's great and allows us access to the clients home with ease.

Care Worker about Phoniro

Benefits and risks

Digital-enabled home health care

Benefits

Technology and service innovation targets a number of the weaknesses of traditional models of health care by delivering a range of services to:

- ▶ Support functional assistance for independent and safe living at home
- ▶ Support and monitoring vital signs and activity levels
- ▶ Set personal independent living objectives and outcomes
- ▶ Reduce hospital admissions and readmissions through a specific focus on:
 - ▶ mobility
 - ▶ fall management
 - ▶ medication compliance
 - ▶ dehydration prevention
 - ▶ continence management
 - ▶ acute and chronic pain management
 - ▶ Infection management and prevention

Providers such as Connected Health via their inhouse 'Living Lab' pilot and test solutions in safe and live environments by engaging groups of older people to appraise new products and service innovations. This offers vital feedback to inform solutions and deliver better client outcomes.

Efficient Health Care Ecosystem

Hospital health care providers benefit by maintaining people's health at home with the ability to improve clinical outcomes with real time and predictive monitoring. This reduces the cost of delivery of care, up to 19-30% compared to traditional inpatient care, especially when factoring in reduced hospital admissions, a reduced hospital footprint - capital and operating costs, and a reduced carbon footprint and energy costs.

Cost-effective

Studies suggest that the cost of Home Health is significantly lower in terms of reducing hospital admissions and readmissions and the associated costs of adverse outcomes as a result of hospital stays.

Home health will gain wider acceptance as a model of delivery of acute care. More sophisticated models of home health will develop with future investment in new, less invasive technologies that reduce the need for health management in hospital, increasing the range of conditions suitable for diagnosis and treatment from home. Current funding models such as Fair Deal, incentivise institutional care. Digital-enabled home health needs to be recognised and funded to allow people and families to access their preferred home health option.



Benefits

Workforce

Digital-enabled home health will transform workforce experience with human-centred digital design. It will support local communities through providing employment with the ability to remotely access specialist health expertise. An outcomes-based approach is shown to be favoured by employees, they find it more rewarding. Teams prefer working with the outcomes-based approach versus the task and time based method. The person-centred focus provides more flexibility and variety within their roles. Staff say there is more opportunity to build rapport and stronger relationships with individuals, to focus on their holistic needs and aspirations, rather than just addressing their medical requirements.

Risks

Information breaches

There is a perception that smart tech can be a pervasive and powerful presence with the risk of reducing people and lives to data streams. This together with the application of commercial and market values has the potential for health care to lose its human expression.

As it stands, service users have the right to ownership of their personal data. Technology and information management must adhere to an individual's rights under data protection legislation. These rights must be effectively protected by measures such as consent, education and consultation to ensure that services users are included in the journey to capture and use their data.

Safety and unquestioning trust in technology

It is important to acknowledge that apps and devices are here to support people and human decision making, not to take their place. Technology such as Electronic Health Records rely on accurate information entry by clinicians.

The simple truth is, no matter how great the technology, how automated and cutting edge our health care systems, tech will never replace human reasoning. There is a need for robust processes and contingencies to mitigate risks such as power outages and technology failures, for example.

Making it happen

Digital-enabled home health care

Making digital-enabled home health care happen

Health care is moving towards a participatory health ecosystem, one that puts people at the centre of their own care journey. To be at the forefront of this emerging and disruptive trend, healthcare systems need an appetite for ambitious transformation. Tough decisions are required in many areas, for example legacy organisations – where to divest, revitalise or pursue innovation. A key decision is the level of investment in technology. Disruptive digital health technologies can accelerate change on two fronts; shifting the care location to anywhere, anytime and the care model to preventive, personalised and participatory. However, investment and effort is required to realise these benefits.

There is a growing recognition that the full range of health care interventions need to be organised around the home rather than traditional institutions, but few healthcare systems have successfully made this a reality. In order to meet growing citizen demands, healthcare systems must invest in new technology enabled models of home health care. These models need to look at centring the delivery of solutions, first and foremost, towards end users' needs and how best technologies can be customised in their homes. The testing and adoption of new technologies is now required in the home health sector through:

- ▶ Learning from other digitally transformed home health care organisations who are digitally transforming. In Japan, Toyota is building a 175 acre smart city where residents will test out technologies like AI, robotics and smart homes
- ▶ Incentivising digital mindsets and person centred innovation
- ▶ Accelerating digital transformation, looking beyond optimisation
- ▶ Aligning the role of leadership in digital transformation, exploring the challenges and how to navigate them

Healthcare systems also need to introduce changes to business and operating models, policies and funding strategies that enable people to play an active part in their own health. Changing citizen expectations are translating to new health care expectations. Healthcare providers must introduce a model to move services from traditional settings to provision and delivered everywhere, including our homes.

To remain relevant and to accelerate progress in a fast-changing environment, government policy leaders, health care leaders, funders and public and private health care providers will need to tackle the duality of growth: taking care of the health care organisation of today while innovating to build the health system of tomorrow. This requires hard decisions around where to invest and a deep understanding of the transformative impact of digital health technologies on health care ecosystem and the populations they serve.



Adding value

Value-based reimbursements, favouring lower-cost settings are transforming the health ecosystem, prompting in part the rise of alternative care locations. This includes walk in clinics located in supermarkets and pharmacies.

Non-traditional players - entrepreneurs, retailers, telecommunications and technology companies, are entering the health field and drawing on their core capabilities in logistics, vertical integration and a deep understanding of consumer behaviour to develop consumer-oriented services. The convenience of healthcare in non-traditional settings appeals to consumers. It offers the opportunity to reshape the primary care system for consumers, reducing avoidable hospitalisations for older people and those with chronic conditions by expanding and managing complex care at home using telehealth technologies.



¹ recovery / living with chronic conditions through Lifestyle and condition specific digital Applications

² medication, exercise, dietary, continence support

³ falls, incontinence

About EY

About ConnectedHealth

Home Health and Enhanced Home Health create a connected, intelligent and personalised model of care fit for the 21st century

About EY

Digital-enabled home health care

Going digital In Health

As digital health moves from future to current state, health providers and funders confront a transformed landscape. Succeeding in the digital health ecosystem may require changing not only how health care organisations operate, but how they view the world.

What EY can do for you

We help clients strategise around the use of disruptive technologies – cloud, mobile, social media, analytics and automation – to better connect health organisations, their networks and patients; improve operations and quality; reduce risk; curtail costs and generate insights that drive better care. Some ways we work with our clients include:

Participatory health

Globally, health systems are under pressure from rising costs, growing consumer expectations and new technologies. The future of health care lies in bold changes to business models, policies and funding strategies that enable consumers to play an active part in their own digital health ecosystem.

Operating Models design and application

We help clients to reimagine how health care in the 2020s can better serve people, families and communities by designing and applying digital-enabled business operating models and agile process approaches. These empowering health care organisations to accelerate their transition to the strategic capabilities and culture they need to succeed in a digitally disrupted world.

Technology

EY's technology team supports clients to design technology-enabled services, with fully integrated virtual care into patient pathways, optimising the design of a person-centred health care delivery system, connected by sensors, real-time data, AI decision support and digital modelling to meet the evolving needs of service users and the workforce.

Analytics as a service (AaaS)

EY's business intelligence solutions and advanced analytics capabilities bridge the gap between data and actionable insights, allowing clients to improve quality of care; reduce fraud, waste and abuse, drive down costs, deliver care in new ways and enhance the customer experience.

Cybersecurity

More and more information – like electronic health records, data on drug and device R&D and pharmacy claims is held virtually and in cloud-based environments. We have a simple, effective approach to identifying security failures and mitigating potential breaches.

About ConnectedHealth

Digital-enabled
home health care

What Connected Health can do for you

Homecare innovation

Connected Health is at forefront of Homecare innovation in Ireland, developing hybrid physical care and innovative solutions in ways which add value and augment, blur and transcend the existing boundary lines between health and social care. This expertise and data on existing pilots is immediately available to related stakeholders. This first-hand experience and data assists in the formation of policy and strategy in the short, medium and longer term.

Digital new solutions

The application of Homecare technology, enhanced home-based clinical services (Hospital at Home and Hospital to Home) and innovative digital solutions is accelerated due to COVID-19. Early data would purposefully indicate that Homecare has delivered an incredibly robust and effective outcome for staff and clients alike. The Connected Health virtual and physical 'Living Lab' can potentially be utilised to test, evaluate and deploy alternative, innovative and new approaches to Homecare. The Living LAB test facility and client focus and test groups could be of significant value in the future assessment of Homecare policy, solutions and strategy.

Innovations delivering people empowerment

Digital homecare leverages innovations in clinical care technology, making possible real participatory care, enabling clients and patients to remain at home and receive quality care. The following are examples of how innovation can deliver patient empowerment;



airCeption

Connected Health has developed a non-invasive continence monitoring and detection device 'airCeption'. The device utilises patented technology to monitor, detect and alert clients and carers to any form of incontinence, without the need for pads or near skin sensors – reducing the risks of infection and providing clients with enhanced clinical and personalised hygiene outcomes.

Key innovation highlight

Uniquely airCeption is a no-contact device. It works by scanning the air for a key compound associated with urinary and faecal incontinence. Utilising a proprietary, patented algorithm airCeption is capable of distinguishing diffusion profiles of the target compound, and consequently transmits a wireless alert when incontinence is recognised. To this end, airCeption benefits users through facilitating prompt and well-managed care responses.

- ▶ Notification of incidents to appointed carers, next of kin and users
- ▶ Availability of trend data to help predict events and promote preventive action
- ▶ Ability to function within multiple environments including nursing care homes and homes with all alerts centralised to one or multiple recipients
- ▶ The potential for the technology to be applied within paediatrics

Benefit to Patient

- Timely response to incidents.
- Less risk of skin damage
- Supporting personal dignity and confidence
- Identifying trends and timely interventions



Phoniro

A digital key system for carers to use their mobile phone rather than physical keys to access clients' homes. A digital lock is fitted inside the door. This discreet solution gives the client more privacy and means that the care giver does not need to handle physical keys. The client will still use a regular door key, but for the carers, there is no need to remember to replace the key. The digital lock is operated by the carer's mobile phone, which allows the office to remotely and securely send and remove the digital key.

Key innovation highlight

The Phoniro system is widely used in Scandinavia and has been in operation since 2004. It is reliable and well-proven, with digital locks installed in 100,000 homes, providing improved safety for clients and more efficiency and convenience for care givers.

- ▶ Improved safety because there are no physical keys to lose
- ▶ Better security because the digital keys can be cancelled remotely
- ▶ More privacy for the client if they replace a lockbox which is on an outside wall
- ▶ Accurate digital record of when the care giver arrives and leaves.
- ▶ Faster access for care givers as there is no need to remember lockbox codes
- ▶ More flexibility for care givers to receive digital keys remotely.
- ▶ Digital record keeping provides an audit of events
- ▶ Digital Key Management increases staff efficiencies and workflow

Benefit to Patient

- Increased safety and security, and peace of mind
- Improved outcomes for high-risk clients by the reduction of missed visits
- Reduction in missed visits means more time for care



PacSana

PacSana Bracelet is a silicone wrist band that records unexpected or sudden changes in movement patterns in the home, enabling active older people to extend their independence. It remains in constant contact with two or more gateways located around the home.

Key innovation highlight

- ▶ By keeping a watching brief on activity and comparing it to historical levels, PacSana can help inform Domiciliary Care Teams when allocating resources
- ▶ PacSana will identify changes in patterns, which can indicate possible issues or upcoming health events, e.g. several days of having not left home, or poor sleep patterns enabling the triggering of domiciliary care interventions.

Benefit to Patient

- Show users movement level at home, providing the user with a metric target to hit and to exceed, incentivising movement and increasing wellbeing.
- Provides insights to patterns of movement as they develop and change over time
- Shows sudden changes in these patterns that could be an adverse event
- Allow the user call for help if they are unable to move after an adverse event



CareBox

Connected Health has developed and built 'CareBox' a new product and service which provides medication reminders and prompts, a 24/7 Virtual Carer via video call, as well as a host of additional functionality.

Key innovation highlight

- ▶ CareBox, works in tandem with the client's TV delivers audio, visual and then live support across anything from medication, to next of kin escalation, carer support
- ▶ The CareBox device is complemented by a user friendly remote control with simple buttons and built in mic to assist with poor hearing and better interaction.
- ▶ Operated through patient's TV - overriding current TV show or standby and automatically switching back when the prompt/Virtual care support is complete

Benefit to Patient

Provides medication management, including medication prompts/reminders with escalation to a Virtual Carer if necessary

Peace of mind for client and their next of kin with Virtual Care Support 24/7 and Mobile App enabling video call, confirmed check in calls and a range of patient centred data

Ease of use for the patient due to operation through patient's own TV, providing familiarity and minimal learning required for use

About EY

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