

Essex Horizon Scan Workshop

Wivenhoe House, University of Essex

23 February 2016

Purpose

1. This paper provides a summary of a multi-partner workshop undertaken with partners across Essex Public Services on 23rd February 2016 in support of the Essex Horizon Scan project.
2. The paper sets out:
 - background information on the Essex Horizon Scan project;
 - an overview of the methodology adopted in the workshop session;
 - the outputs from the workshop – a long-list of future trends/issues which will shape life in Essex and the public services operating environment over the next 15-20 years; and
 - next steps for the project.

Background to the Essex Horizon Scan project

3. The Horizon Scan project aims to systematically identify and examine potentially significant medium- to long-term threats and opportunities that could impact upon public services in Greater Essex. By identifying these threats and opportunities, the project will provide a platform upon which partners can plan – individually and collectively – to meet future challenges. The project has the potential to strengthen partners collective ability to plan beyond normal political and budgetary cycles.
4. Specifically, the project aims to:
 - consider and prioritise emergent trends/issues that will impact over the next 20 years;
 - develop a set of evidence-based outputs that can be used by partners across Greater Essex to support strategic planning at the organisational and partnership level; and
 - inform long-term policy interventions to mitigate risks or exploit opportunities.
5. The Horizon Scan project is being led by the University of Essex on behalf of the Essex Partnership Board. Professor Jules Pretty, University of Essex, has been leading the project Steering Group, which includes representatives from within local government (Essex County Council), the criminal Justice system, (Office of the Police and Crime Commissioner) and the National Health Service (North east Essex CCG).
6. The RSA have been engaged to shape and deliver this project with local partners.

The workshop

7. The aim of this workshop was to work collaboratively to identify around 50 future trends or developments that will impact Essex life up to 2030.
8. In order to do this, we brought together around 40 participants, drawing on their professional and sector-specific expertise, and working as a group, to determine which trends will be most significant over the next 15-20 years. Participants came from organisations across a variety of sectors (public, private, higher education, and voluntary and community sector) and a range of disciplines (e.g. local government, health services, law enforcement, central government, and environmental protection).
9. The workshop was undertaken as a first step in preparing for a wider summit bringing together Essex's public service leaders to examine long-term challenges and opportunities on 26th April 2016.

Methodology

10. The methodology used in the workshop session was based on the following:
 - Provocation
 - Exploration
 - Gap analysis
 - Initial risk assessment
 - Risk allocation
 - Risk refinement
11. A copy of the full workshop agenda can be found at Annex A.
12. **Provocation:** the day started with a presentation (slides attached), setting out the tasks for the day and presenting three cross-cutting changes identified in the RSA's desk-based horizon scanning research. This research drew from the RSA's own analysis, analyses of Government, corporate and expert forecasting, past trends and current datasets and interviews with key individuals including RSA follows and Essex public service leaders.

The key themes identified and used as provocation were:

- **Demography and values** - encompassing issues such as demographic change, diversity, and migration;
- **Technology and Society** - looking at technological developments and how these may effect public services and employment, as well as social responses to these changes; and
- **Politics and Power** - identifying macro-level political shifts of disengagement with traditional political institutions but a rise in local-level, activist-led, highly digital forms of participation, and looking at how this shift coheres with the demands of governance.

13. **Exploration:** having set out these cross-cutting challenges, the first group working session of the day was introduced. In this session, participants were asked to reflect on what trends they foresee having a significant and growing impact on Essex up to 2030 from within their discipline. In addition to this, participants were invited to identify 'wild card' trends from outside of their field of expertise they see as having a major impact. Attendees were asked to write their identified trends onto blank cards provided.
14. **Gap analysis:** participants discussed the trends they had picked within groups of around 7/8, working as a table to identify issues that had been missed in the individual activity, and filling in additional cards collectively to fill these gaps. Having done this, each of the four groups reported back to the room the trends they identified.
15. **Initial risk assessment:** At this point, these trends were 'harvested' and placed in a gallery to facilitate an initial risk assessment. This involved participants viewing the gallery of trends, and then voting on which risks they individually felt were most likely to continue and, if they were to continue, would have the greatest impact.
16. **Risk allocation:** Once all the participants had voted, the distribution of votes was used as a basis for ranking the trends on a risk matrix.

Low Impact High likelihood	High Impact High likelihood
Low impact Low likelihood	High Impact Low likelihood

17. **Risk refinement:** Having plotted these trends based on participants' votes, participants undertook a plenary review process, discussing whether any of the trends should be placed differently. As a result of this process, a number of trends were repositioned on the matrix as participants collectively decided that they were more or less important than the initial voting process had suggested.

Following this repositioning exercise, the matrix accurately represented the how important each trend was seen to be by the group. Moving forward the trend cards and their final position on the risk matrix will be the currency of the project. The list of these trends, along with a short description are set out below.

Key trends and issues

18. The trends identified through the workshop are set out below. They have been grouped to reflect partners' collective assessment of their likelihood/impact.

High Likelihood/High Impact trends

19. The high impact/high likelihood trends identified were as follows:

- **Changing work practices** - the development of superfast communications technology and shifts in the labour market as a result of automation may make flexible working practices more feasible and attractive, with more people working remotely or from home.
- **Transformation of social care** - with an increased elderly population and technological development, healthcare professionals will need to adapt to deliver effective services accessible to all.
- **Public Sector Finance** - the public sector and local government are likely to see changes in how they are financed – this will see increased competition across administrative boundaries, and brings challenges regarding cross-service alignment.
- **Gridlock** - as increasing demand is expected over the next 30 years, strain on transport infrastructure is likely to increase. High demand could lead to the introduction of capacity management systems such as tolls and segmentation.
- **Digital Public Services** - Increased public expectation that everything can be done online will bring challenges for public services in enabling this to happen, and ensuring citizens who are not 'tech-enabled' or are vulnerable are not left out.
- **Digital Transformation: Internet of Things** - the development of the Internet of Things will bring with it possibilities and challenges. For example, how will communities respond to this change; how can public services adapt; how can we develop a data infrastructure to take full advantage of the possibilities.
- **Demography/Aging population** - by 2032 there will be a 1/3 increase in 65-84 year olds, and a 50% increase in 85+. These trends will create huge pressure on the NHS, housing, community cohesion, public service costs, and the social contract more generally.
- **Changing demands for skills** - rising demand for tech natives and reduced labour market requirements will shift the landscape for skills. More flexible forms of learning may be needed to adapt to these changes.
- **Childhood Obesity** - 1 in 10 children start school obese, with this rising to 1 in 5 by the time they leave school, leading to higher lifetime health costs.

High Likelihood/Lower Impact trends

20. The high likelihood/lower impact trends identified were as follows:

- **The Pace of Technological Change** - flexibility will be needed in infrastructure projects to ensure long-term value for money and future-proofing. Potential conflicts between the challenges of today and those of the future will need to be managed.
- **Changing nature of crime** - the current scale of cyber-related crime would not have been planned for 10 years ago. In the future, police will need to balance resources between being able to respond to cyber-related demand and to be visible and deliver results
- **Public Confidence in data-sharing** - in order to yield the full benefit of data-sharing in public services, public confidence in the use and protection of data within this system must be maintained. There may be a lack of public understanding of the full benefits of data-sharing to service quality and cost.
- **Shifts in energy production** - less reliance on traditional sources and an increase in renewable may lead to more micro-generation. Issues of energy poverty must be addressed, as must the potential increased demand on the energy system as a result of technological innovation.
- **New leisure opportunities in urban spaces** - as a result of technology-driven changes in working practices and shopping habits, town centres may develop leisure spaces, becoming primarily recreational space.
- **Diversification of types of abuse** - we may see a diversification in types of abuse, e.g. online-enabled abuse or domestic violence in older couples where dementia is a factor.
- **Wearable health** - health wearables amount to 60% of the wearables market, and the development of technology such as smart contact lenses and fitness bands. Strong customer satisfaction when used, and the possibility of peer-to-peer monitoring may lessen demand on professional services.

Lower Likelihood/Higher Impact trends

21. The lower likelihood/higher impact trends identified were as follows:

- **Designing inclusive infrastructure** - How will we design infrastructure for inclusion in the future; ensuring resilience, sustainability, and lower costs?
- **Individual-led commissioning** - Commissioning models might emerge that enable individuals to commission for themselves or collectively. In these models, the role of public services becomes one of quality-assurance or platforms for choice.
- **Loss of biodiversity** - Loss of land and lack of management of existing sites may threaten biodiversity.
- **Health demand management in the community** - there is a need to reduce demand on health services such as A+E. This may involve changing expectations, GP contracts, or developing separate community offers.
- **Risk aversion in public services** - a strong focus on accountability and being able to defend and justify decisions may lead to limited opportunities to take risks, stifling creativity or innovation.
- **Sustainable development** - development on flood plains brings significant risks, increasing the costs of flooding, impacting hardest on the most vulnerable. Co-operation with developers to ensure future development minimises flood risk is crucial.
- **Challenges for educational institutions** - Educational institutions often fail to foster and facilitate the skills necessary to enable people to thrive in the labour market. Shift of emphasis to STEM subjects not effective. The belief that University is for all having adverse effects on students.

Lower likelihood/lower impact trends

22. The lower likelihood/higher impact trends identified were as follows:

- **Increased temperature** - Increased in global temperature over the next 15 years will influence wildlife, agriculture, and human populations.
- **Public Sector structure** - attempts to bring about better co-ordination and cross-departmental organisation within the public sector may bring about possibilities for different governance structures.
- **Changing workplace patterns** - significant changes are predicted in workplace patterns, such as older people shifting career paths as they live longer, greater self-employment, and re-skilling in adult life. There will be challenges managing transitions between work and ensuring adequate skills provision.
- **Circular economy in resource management** - resource scarcity and climate change may encourage shifts to circular resource usage, keeping resources in use for as long as possible, and recovering and regenerating materials at the end of their current life.
- **Terrorism** - the threat of terrorism may become more prominent in the future, with the potential that natural resources or technology could be used as a weapon. This brings challenges for public services in the future.
- **Mental Health and loneliness** - Increased isolation and loneliness bring about mental health challenges. Technology is likely to increase this challenge.
- **Competition for land** - Competition for land between competing demands for wildlife, housing usage, and other development, is likely to intensify.
- **Workplace mobility through greater connectivity** - Greater workplace mobility may bring about reduced rush-hour congestion, as fewer people need to work in office environments to be effective.
- **Search for Authenticity** - Automation and loss of connection with nature may lead to a sense of disillusionment and loss for people.
- **Citizen Action** - Potential increases in citizen action and volunteering.
- **Prevention (not policing)** - Police agencies will focus on empowering communities and preventing crimes before they happen. Data sharing between agencies will help as a tool to identify potential dangers or harms.

- **Social Value and stewardship** - Ensuring social goods for future generations may require collective decisions about current usage – for example, of antibiotics.
- **Community Asset models of public services** -transfer of ownership of community assets.
- **Impact of environmental change on wellbeing** - environmental changes or damage could detrimentally impact the wellbeing of the population. Air pollution and coastal erosion, for example, both impact on wellbeing.
- **Behavioural change for social good** - changing behaviours on land and resource use, consumption and lifestyle will be a necessary element of tackling climate change – how do we effectively bring about this behaviour change?
- **Hubs of expertise** - Towns may be able to develop ‘hubs of expertise’ – for example, the insurance industry in Chelmsford and Creative arts in Colchester. Local education providers may be able to work to provide young people with the relevant skills in these areas.
- **Visibility of data improving personal outcomes** - The emergence of big data and wearable health technology makes up-to-date health data available to individuals, opening up the possibility of more effective early intervention and crowdsourcing of analysis.
- **Autonomous vehicle technology** - Autonomous vehicle technology may bring about opportunities to change usage patterns, reducing car ownership and transforming freight movement. It may provide opportunities to reshape towns and urban spaces.
- **Systemic economic shocks** - Local government and public service may be at greater risk of economic shocks as the bulk of funding for local government will be raised locally from 2020. These shocks could stymie local growth and receipts for local services.
- **Managing demand on emergency services** - Emergency services may need to work more closely in the future. There may be greater scrutiny and higher public expectations, bringing their own challenges.
- **Data storage and security** - The cost of data storage and security may increase over time, as will the cost and importance of transfer data across storage technologies as software and hardware systems develop.
- **Hospital villages** - Building communities of care linked to all hospital and health services may enable more effective healthcare for older people.
- **Housing Tenure Shift** - Projections suggest that current patterns of housing tenure will see the percentage of all households in private rented accommodation surpass owner occupation in the UK. This has impacts on intergeneration poverty and inequality.

Next steps

23. The outputs from the Horizon Scan workshop will form a basis for further research, to be carried out in advance of the Essex Challenges Summit on 26th April.
24. Beyond this date, the outputs will feed directly into a report on the Horizon Scan study and a suite of online-resources that can be used to assist partners, organisations and individuals in planning for the next 15-20 years.
25. **Looking forward to the next steps of the project, there are a few things that you can do to strengthen this project**
 - **Give feedback:** Have we missed any key trends that will impact on Essex up to 2030? If you think we have, please let us know at horizon.scan@rsa.org.uk
 - **Give data:** If you have access to Essex-specific data on existing trends or future forecasts that you think may be of relevance to the project, please let us know.
 - **Give your support:** Please sign up to the Summit on 26th April. This Summit will look to narrow down the trends identified in the workshop to some key priority issues and ensure a legacy for this project across Essex.

Annex A

The full schedule for the workshop is set out below

10am	Welcome and Introductions Tom Scotto			
10:10	Plenary presentation – Trends and Issues for 2030 Anthony Painter and Rowan Conway			
10:30am	Systematic forecasting Breakout Chair: Alastair Gordon Facilitator: Anthony Painter	Systematic forecasting Breakout 2: Chair: Pam Greene Rowan Conway 8 delegates	Systematic forecasting Breakout Chair: Carly Fry Facilitator: Joe Bonnell 8 delegates	Systematic forecasting Breakout Chair: Tom Scotto Facilitator: Paul Buddery 8 delegates
11:15	Tea Break			
11:30	Fill the horizon Breakout Partner work to create 5 more futurecards	Fill the horizon Breakout Partner work to create 5 more futurecards	Fill the horizon Breakout Partner work to create 5 more futurecards	Fill the horizon Breakout Partner work to create 5 more futurecards
12:30	Lunch and networking			
1:30-2:30pm	Ranking the 100 Gallery carousel – participants review all of the challenges on the wall Giving a risk rating for likelihood/impact with stickers provided			
2-3pm	Risk Matrix Challenge selection			
3pm	Tea Break			
3:15pm	Next steps Grand challenges summit plan – your role			
4pm	Close			