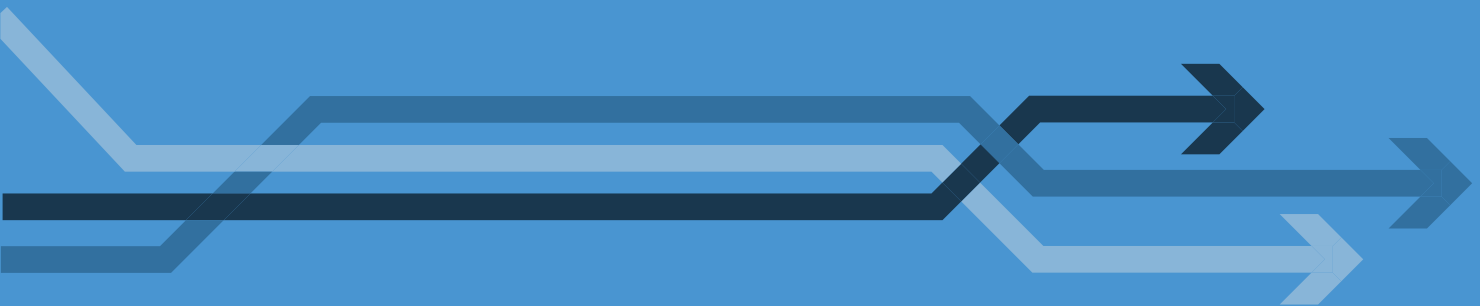


Future Transport

# Gridlock



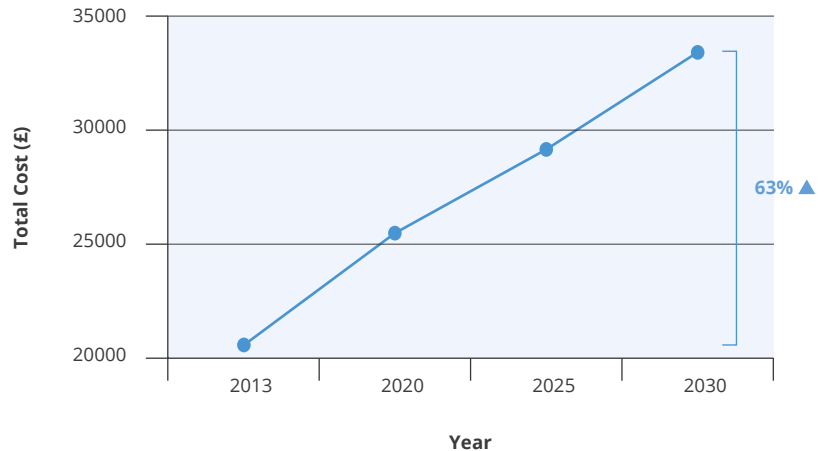
With increasing urbanisation and high demand on road usage, the cost of gridlock and congestion for the economy is likely to increase.

It is estimated that between 2013 and 2030 the total cost of UK gridlock will rise by 63%.

This cost may act as an incentive in the accelerated development of 'smart' forms of transport management, such as driverless cars and the use of big data in transport systems.

- **What will be the impacts of increasing gridlock on the economy and wider life of Essex?**

**Total Cost of UK gridlock**



Source: CEBR (2014)

Future Jobs

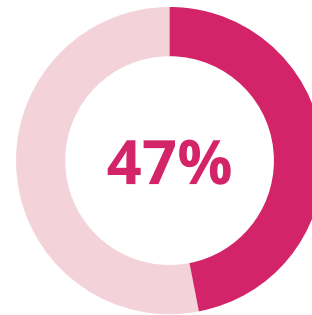
# Automation



Rapid technological development has led to predictions that significant numbers of routine jobs will be automated over the coming decades.

Frey and Osborne have found that 47% of jobs are at high risk of automation, with an increasingly high value placed on non-routine, creative, or analytical skills. Other studies, such as from the Bank of England and McKinsey Global Institute, have found the same potential impacts.

- **Which key sectors in Greater Essex are most vulnerable to automation?**
- **Is this an area of major risk for Essex and it's people?**



**of jobs at high risk  
of automation**

Future Jobs

# Self-employment



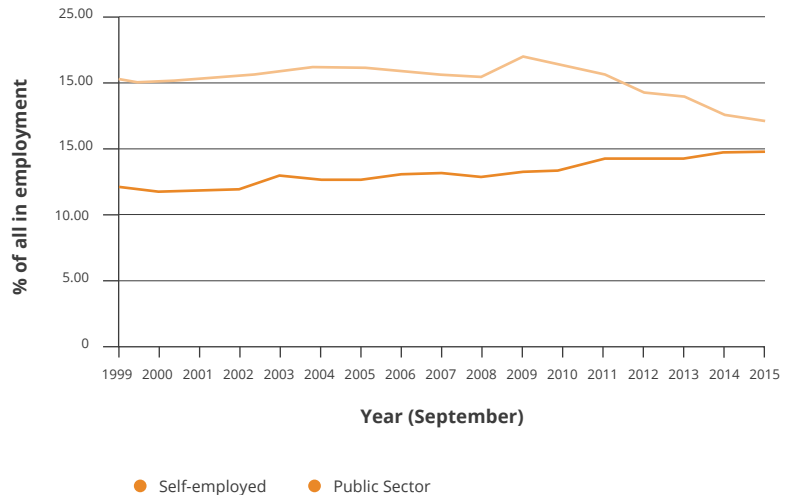
Recent years have seen a shift towards self-employment, with some forecast scenarios even seeing the number of self-employed workers in the UK outstripping the number of public sector employees by the end of the decade.

The number of self-employed workers in the UK is at an all-time high, with 4.62m people self-employed in November 2015.

- Is the growth we have recently seen in the self-employed likely to continue?
- If so, what impacts will this have on Essex?

4.63m

Self employed  
in Nov 2015



Source - ONS (2015)

Future Climate

# Food Security



With unpredictable weather events becoming increasingly frequent, ensuring high agricultural productivity and food security could become increasingly challenging.

It is estimated that UK farming has suffered significantly as a result of extreme weather events this century, losing £603m in 2000-1, £66m in 2007, and £1.2bn in 2012. This unpredictability is likely to impact local economies and could cause unpredictable agricultural yields.

- **Is Essex's agricultural sector prepared for climate change? If not, could this be very costly for the county's agriculture?**
- **How significant could rising food prices be for Essex and its most deprived people including pensioners?**



**Lost in 2012 due to  
extreme weather events**



Future Health

# Mental Health

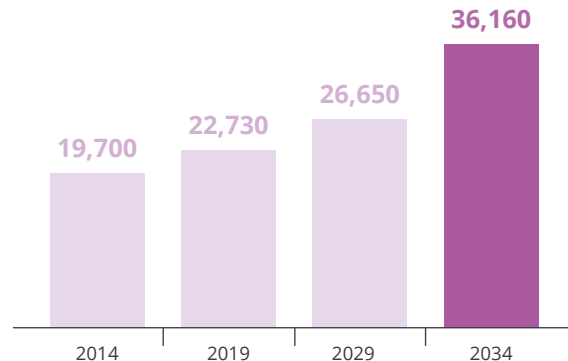


Mental health issues have seen unprecedented publicity and popular awareness in recent years. However, the costs of treating mental illness are likely to rise in the coming years, particularly among older people.

In Essex it is estimated that the number of people living with dementia will rise by 84% between 2014 and 2034, with cases in Braintree, Maldon and Uttlesford more than doubling.

- **What is the added cost to people and public services of not effectively dealing with mental health issues?**
- **Will a rise in mental health concerns create significant new challenges for the NHS, public services, communities and families?**

**Number of people living with dementia**



Source: Essex County Council, p 49 (2014)

Future Health

# NHS Demand

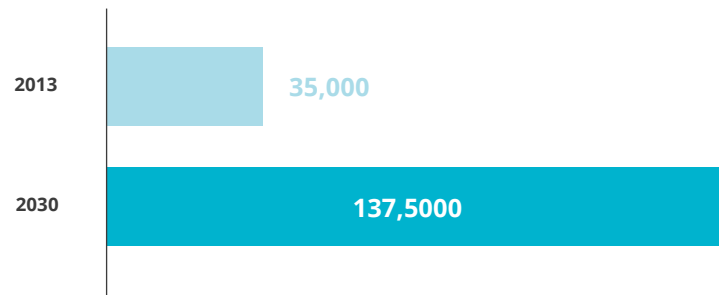


With an ageing population, the demands on health and social care services look set to increase in the coming 15 years.

The number of people in Essex needing social care support is expected to rise from 35,000 in 2013 to 137,500 by 2030, with health services likely to feel similar pressures of increased numbers of older residents, squeezed budgets, and stretched infrastructure.

- **Are Essex's NHS and social care systems ready for increased demand?**
- **What will be the consequences of failing to adapt? Is there a risk of failure?**

**The number of people in Essex needing social care support**



Source – Who Will Care Commission (2013)

Future Housing

# Housing Demand

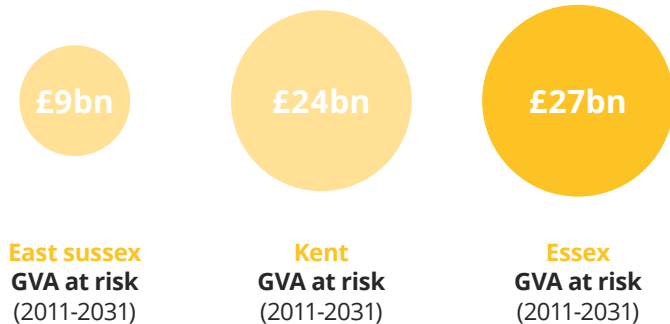


Housing demand is likely to rise in Essex, as the number of homes being built has missed targets in recent years and may continue to do so.

Within the context of rising demand and the further sprawl of East London into the west of Essex with the completion of Crossrail, housing challenges are likely to become more severe. It has been estimated that up to 2031 around £27bn of GVA in Essex is at risk due to a failure to adequately respond to housing needs. Essex's housebuilding programme is already at less than half of what is needed in terms of completions.

- **What are the implications of failing to meet the demand?**

**GVA in Essex at risk**



Future Society

# Age of no retirement

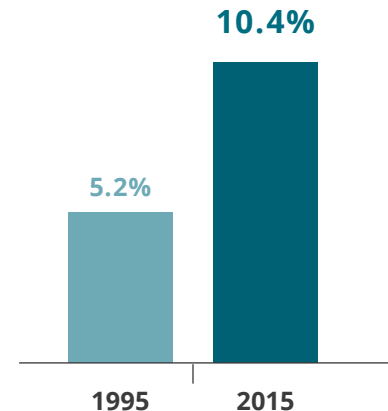


The combination of a probable rise in the pension age for current workers due to demographic shifts may bring about increased part-time activity and self-employment among older workers who never 'formally' retire.

From 1995 to 2015 the employment rate for people aged 65+ rose from 5.2% to 10.4%; as the retirement age for women rises further above 65 in the next 20 years, this is likely to increase.

- **How can public services change to provide more flexible working opportunities for older workers?**
- **Will this trend be a boost or drag on the local economy?**

Employment rate for people aged 65+



Source - DWP (2014)



Economic Scenario 1

# Goldilocks



# Goldilocks

**This scenario sees steady, stable economic growth at pre-crash levels.**

- Productivity increases at a low but steady rate (1.5%-2%).
- Technological change is continuous, though at a slower pace than in a high-growth scenario.
- Public finances are slowly repaired, though increases in the number of very young and very old act as a continued constraint.

Economic Scenario 2

# Point Break



## Point Break

**In this scenario, economic growth is erratic and volatile, distributed unequally across sectors and society more broadly**

- UK private debt continues to expand rapidly, driven by global capital flows, to which the UK is highly exposed.
- Public service planning is fraught, and trust in local and national decision-makers is low. Growth, investment, and financial policy are stop-start, with little long-term certainty.

# Economic Scenario 3

# Sloth



# Sloth

**This scenario is characterised by secular stagnation.**

- The public sector remains weak and poorly financed, and the private sector is nervous about investment.
- It is a low innovation environment, and when innovation does occur it is low risk and entrepreneurial rather than systemic.
- The 2020s are seen as another lost decade but not a catastrophic one, characterised by trepidation and fragility.

Economic Scenario 4

# A new growth paradigm



## A new growth paradigm

**In this scenario, the UK is at the centre of a global eruption of technological innovation.**

- A string of large-scale, high-impact innovations (such as green infrastructure, automated and connected transport technologies, and automated manufacturing) are developed and implemented at a rapid pace.
- New careers and consumer markets emerge, and productivity surges to over 3% a year. Public finances repair and resources for greater investment in innovation are freed up.
- The effect of these shifts for most people is positive, but huge challenges face those people and places left worse off.



Future Crime

# Future Crime



It is likely that in the coming years police forces will need to work more closely with other agencies on both a local and national level. This collaboration may lead to possibilities for different methods of crime detection, investigation, and prevention; for example, harm identification and reduction with regards to violent crime may become an increasingly cross-sector challenge, with the sharing of information across agencies a key feature of such a shift.

- **What are the main obstacles to taking on a cross-agency approach?**
- **What will be the consequences for police services for failing to shift to this approach?**

Future Climate

# Extreme Weather

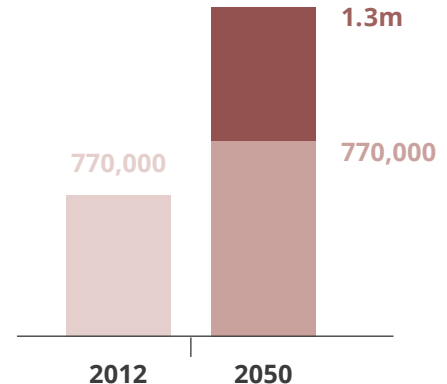


A changing climate is likely to bring significantly increased risks of extreme weather events such as flooding or droughts, which will impact on individuals, transport infrastructure, and vital economic sectors.

It is estimated that the number of properties at significant risk of flooding in the UK will rise from 560,000 in 2012 to between 770,000 and 1.3m in 2050.

- **Will Essex face increasing flood risks in the coming years?**
- **Is the cost to Essex's communities and economies likely to increase?**
- **Is this one of the major risks that Essex faces in the next decade or so?**

**Number of properties at significant risk of flooding in the UK**



Source - UK Climate Change Risk Assessment (2012)

Future Public Services

# Commissioning



Due in part to likely budget reductions in the coming years, commissioning models are shifting towards collaborative, data-led, whole-system forms of working.

The importance of data-sharing in collaborative commissioning models may lead to agencies working more closely together; it also opens up possibilities for the use of behavioural insights in informing service models or predicting demand.

These budgetary pressures might also lead to increasing vertical integration between agencies.

- **How quickly can public services move towards these forms of commissioning over the next decade?**
- **What will be the consequences for Essex of services failing to move in this direction or moving too?**

# Future Essex

