

A close-up photograph of a rowing team in a boat on water. The rowers are wearing white tank tops and dark blue long-sleeved shirts. They are holding oars with yellow grips. The boat is dark-colored and has a white seat. The water is dark and rippled. The background is a bright, overcast sky.

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# Essex Horizon Scan: Final Report

Volume One:  
Top 20 trends affecting Essex

August 2016

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This report has been prepared by the RSA on behalf of the Essex Partnership Board.

It has been prepared as an input to the Board's collective planning and to the wider development of strategic policy within Essex. It does not necessarily reflect the views of the Essex Partnership Board or its members.

## Introduction

**This is the final report of the Essex Horizon Scan.**

1. In December 2015 the Essex Partnership Board initiated a multi-partner 'Essex Horizon Scan', under the guidance of a multi-partner steering group. The project was designed to systematically identify and examine trends, issues, threats and opportunities that could impact upon public services in Essex. The project aimed to provide a platform upon which partners could plan – individually and collectively – to meet future challenges.
2. Specifically, the aims of the project were to:
  - a. consider and prioritise emergent trends and issues that will impact over the next 10-15 years;
  - b. develop a set of evidence-based outputs that can be used by partners across Essex to support strategic planning at the organisational and partnership level; and
  - c. inform long-term policy interventions to mitigate risks or exploit opportunities.
3. Essex partners have been working with the RSA to deliver this project. They invited the RSA to design a process of research and consultation to draw on the expertise of partners and engage them in thinking through future challenges and implications.
4. The purpose of this report is two-fold:
  - a. To present the top twenty trends identified through an iterative and consultative process. There are further challenges which were identified in the process and these appear in Annex One.
  - b. To analyse what these top-twenty trends might mean for Essex: its leaders, its businesses, its civil society, and its citizens.
5. A volume two of this report outlines the general strategies that might be adopted to respond to the opportunities and challenges posed by these trends. A summary of the top twenty trends is also available as a set of power point slides.
6. The trends can be summarised as follows:
  - a. **An economy which is re-structuring** with new industries, jobs and opportunity but uncertain foundations and likely transitional stresses including adaptation to anticipated UK departure from the EU.
  - b. **Technology changing our relationships** with each other, work and services.
  - c. Public services facing new possibilities but **new demands and expectations** with still limited resources.
  - d. Governance with **new powers** at the local level **but uncertainty** about how they can be best deployed and a search for new models of systemic leadership.

- e. A changing population that exhibits **dynamism** and enjoys **longevity**, but creates new **demands**.
- f. A society that is **plural but divided in many ways** creating stresses and some conflict.

## Methodology

7. The project's methodology was designed to blend rigorous research and analysis with wide partner engagement. The RSA worked with Essex partners through the following stages:
 

**Stage 1:** a set of long-term trends, issues, threats and opportunities were identified through a literature review and interviews with public service leaders;

**Stage 2:** a multi-partner workshop was held with around 40 representatives from academia, public service, and the private and third sectors in February 2016. This workshop invited participants to share trends and issues from their own areas of work and, through facilitated discussions, to reach consensus on their likelihood and impact on Essex; and

**Stage 3:** further research and analysis was carried out on the 'top 20' trends identified through the workshop and follow-up discussions with participants.
8. In early 2016, the RSA worked with Essex partners to:
  - a. explore available data and literature from HM Government, academia, commercial organisations, NGOs and think tanks on likely trends over the next 10-15 years;
  - b. consult with key Essex partners and others on possible change scenarios;
  - c. explore, through a day-long workshop with more than forty Essex partners the most significant trends for Essex, exploring potential impacts and their likelihood; and
  - d. develop further the top trends and consider how they might interact with macro changes such as the economy, technology, demographics and politics/governance.
9. In April 2016, a large group of over 100 Essex leaders came together for a Horizon Scan summit where they worked through this information with a view to:
  - a. gaining and sharing further insight on the trends, identifying gaps, risks and opportunities;
  - b. beginning the process of exploring how Essex might contend with the changes that have been identified; and
  - c. helping to establish the networks and bonds that will enable Essex to think through collaborative strategies and responses to future challenges and opportunities.
10. This report sets out the thinking that was developed during this process on the challenges that Essex faces in the years ahead.

## Context: Three decades of change

11. Looking at the last two decades we can identify broad trends that help signal the likely direction of travel in the next decade.

Theme	2000s 'the great calm'	2010s 'the great storm'	2020s 'a rocky settling'?
Economy	Benign growth and hidden risk	Volatility and austerity	Continuing volatility, digital tech economy and global power shifts, with potential impacts from Brexit?
Technology	IT, internet 2.0 and mobile	Total connectivity	Artificial Intelligence, automation, and spread of data analytics?
Public Services	Steady growth and centralization	Austerity and devolution	Resource limited but more collaborative and broad outcome oriented?
Governance	Central target-setting	Responsibility spreading to more local level	Even stronger local, county and sub-regional leadership?
Demography	Baby-boomer prime, migration flows	Baby boomer retirement, migration flow continue	Young bulge, more diverse, older still.
Society	Mass consumerism	Some fragmenting of mass culture into more niche identities of a variety of forms	Growing divisions or growing respect for difference?
Environment	Global impact of the long term effects of climate change.	Transnational agreements on fossil fuels start becoming more urgent and frequent.	Potential for further and more damaging effects of climate change, in Essex and across the globe.

12. The first decade of the 21<sup>st</sup> century was a time of public investment and benign economic growth. Society was generally prosperous; the digital sector was developing with rapid growth of mobile technologies. Government was confident in its role to drive improvement through centralised policy and target setting and relatively active in providing social support. Migration

was not seen as threatening prosperity or stability though it became a growing political concern as the decade progressed.

13. The global financial crash of 2008 and the following period of recession triggered a shift in economic attitudes and outlook. While the immediate political response was interventionist – using public resources to stabilise and consolidate, a change of Government in 2010 ushered in a new era of austerity with greater responsibility devolved to regions, localities and individual institutions. Greater insecurity heightened social division, for example around issues like migration, and exacerbated pressures of ageing, poverty and physical and mental health on public services.
14. Looking ahead to the 2020s, we expect the economy to become ever more digital and global, with growing application of automation, artificial intelligence and data analytics transforming whole sectors- some of which will disappear while new industries are born. The pace of these changes is uncertain but they will occupy the minds of the public, business, and political leaders locally and nationally.
15. Without an unforeseen spike in national productivity, public services are likely to remain ‘cash poor’ and will need to collaborate in, often complex, networks of provision or face a public sphere with diminishing capability and impact. The 2020s could see large parts of the population disengage with formal politics (much as we have seen throughout the 2000s and 2010s) but leaders are likely to experience challenges as large sections of the population unite around specific issues or popular causes enabled by social media.
16. This distrust of formal politics is something that has been in sharp focus during the EU referendum. There are likely to be challenges for leadership as the pressures from campaigns, which emerge suddenly, challenge decision-makers around narrow populist issues and mobilise large numbers through social media and online petitions, become more acute.
17. Tensions will remain between long-term planning to meet needs and immediate public demands. Indeed, these tensions could well intensify in a context of differential needs between generations, public resource scarcity mixed with increasing demand, and a diversifying population in terms of values, ethnicity, and expectations. Demands placed on public leaders are not insurmountable but they do demand different skills and behaviours from those traditionally required. Leaders will need to be more entrepreneurial. They will need to mobilise their organisations to respond quickly to public demands while at the same time working carefully and consistently to build new forms of cooperation – between public organisations, with the private sector, and with the public. It is absolutely right that Essex’s leaders are already considering their response to this environment.
18. This report is designed to present the core trends that will impact Essex and consider, at a very initial stage, how the county’s leaders can approach a challenging decade and a half.

## The key trends

### Introducing the trends

19. Initial research and consultation identified a long list of potentially important future trends. These were ranked and scored through discussion with over forty key partners, and further analysed through research. Through this process the RSA were able to identify the key trends that seem to be most significant for Essex (the twenty key trends themselves are identified in **bold**).

### Population and demographics

20. We know that **Essex is ageing**. By 2031, people aged 65 or over will make up 28 per cent of the total of Essex population, with the number of those over 85 more than doubling, from 31,000 to 77,000<sup>i</sup>. One-in-six of the UK population, 10 million people, are over 65, and by 2050 one in-four will be. These trends bring mounting pressure on the NHS, housing, community cohesion, public service costs, and the social contract more generally.
21. Proximity to the capital will influence development as Essex absorbs **London overspill**. Essex is already seeing high annual increases in house prices as many London workers move out and this trend is likely to accelerate as the push of house prices and the pull of transport improvements encourages commuters to move further out of London. As Essex house prices begin to approach those in London in some areas of the county, growing numbers of people, including key workers and first time buyers, will find it increasingly difficult to afford to buy a home within reasonable reach of where they work.
22. House prices have risen rapidly but not evenly across the area. Overall house prices in Essex rose by 9.9% in the year to April 2016, compared to 13.9% in Greater London.<sup>ii</sup> During 2015, house prices rose by 14% across Essex, with the biggest increases in Basildon, up by 21%; Chelmsford, up by 17.5% and Brentwood, up by 11.5%.<sup>iii</sup>
23. Boosted by Crossrail, which starts running in 2018, house prices in Brentwood rose by 15% in the first quarter of 2016 with average house prices at £480,000 following close behind London and well above the average for England and Wales.<sup>iv</sup> Brentwood and Shenfield are the final two stations in the north-east section of the line, and passengers will be able to travel right into the West End without having to use the Tube.
24. Other towns in Essex with good transport links to London are becoming increasingly attractive for first time buyers looking for more affordable property. In the 12 months to February 2016, Basildon saw a 50% increase in the numbers of first time buyers, followed by Brentwood up 35% and Chelmsford up by 25%.<sup>v</sup> Thames Gateway South Essex, arguably Europe's largest regeneration area, has been identified as the Government's top priority for regeneration and growth. Employment in the area is planned to increase by 55,000 from the current 230,000. Although 55,000 people commute into London every day, over 70,000 commute into the Thames Gateway area to work.<sup>vi</sup>
25. These changes will contribute to an increasingly **diverse population – in many dimensions including values, ethnicity, and age mix**. Some areas, particularly in the west of Essex that

experience rapid population growth will increasingly see a demographic mix that looks more like London with a wider range of cultural, socio-economic and ethnic diversity.

26. The younger age groups are more ethnically diverse. 5.6% of the overall Essex population are black and minority ethnic (BAME), compared to 11.1% of 0-19 year olds and the consistent trend is towards greater diversity – particularly in Essex’s urban areas.<sup>vii</sup> The most diverse areas are in the west of the county, such as Harlow, Epping Forest, and Brentwood. In Harlow and Epping Forest around a quarter of school children are from a BAME background. The numbers of children in Essex from black and minority ethnic backgrounds almost doubled between 2001 and 2011 from 18,257 to 36,291.<sup>viii</sup>
27. West Essex faces the highest increase in the number of school places required, predicted to need between 16 and 22 per cent more secondary school places by 2020.<sup>ix</sup> As young people and their families move to Essex from London, this impacts Essex’s age and diversity profile significantly.
28. Colchester has 17% of pupils from BAME backgrounds and is also facing up to 20% increase in need for secondary school places. In contrast, Basildon and Brentwood, which have relatively diverse younger populations (16% and 20% of school pupils are from BAME backgrounds), but are seeing population growth from first time buyers attracted by transport links to London, are predicted to require relatively small increases in school places.<sup>x</sup>
29. However, numbers of young children are forecast to increase substantially, especially in Braintree, Chelmsford, Colchester, Basildon and across West Essex. Forecasts based on the 2011 census show that the number of 5-9 year olds in Essex will go from being the smallest group in 2012 to by far the largest group in 2017.<sup>xi</sup>
30. The proportion of pupils with English as an additional language (EAL) has also risen in recent years across all districts in Essex. In 2012, 9,000 pupils had English as an additional language, more than 170 languages are spoken, and Polish is the most commonly spoken language after English.<sup>xii</sup>
31. The drivers towards the trend of increasing diversity – differential house prices vis-à-vis London, improved transport links and Essex’s position as an alternative to London- are well set to continue between now and 2030.
32. Accompanying these changes, there are major **shifts in values** across the generations, particularly in attitudes to public services. The Baby Boomer generation, now aged 50-70, are broadly positive: 65% agree with the statement that “public services are Britain’s proudest achievement”. However, the younger Generation Y, aged 16-36, are much more sceptical. Only 25% agree with the statement.<sup>xiii</sup> This may reflect different expectations from this generation about how services are provided based on their day-to day experiences of digital sharing, creation and communication. Generation Y is seen as less deferential, more comfortable with distributed power and peer-to-peer networks, and more likely to want to be producers of their own services.



## Work

33. We are likely to see continued growth of the **home workforce**.
34. By 2014, 4.2 million or 14 per cent of the total working population were home-workers.<sup>xiv</sup> Home-workers tend to be older, with three quarters in higher skilled roles and 63% self-employed. Trends point to 5.7 million homeworkers in the UK by 2030 which would mean 130,000 homeworkers in Essex<sup>xv</sup>. By 2019, 95% of Essex premises should have superfast broadband connectivity.<sup>xvi</sup> By harnessing this trend, there could be a chance to rethink local geographies and community life. High streets might find new demand for high-quality niche retail.
35. There will be growing **demand for skills** in tech, creativity, empathy and problem-solving. The UK has the largest internet based economy (as a proportion of GDP) in the world.<sup>xvii</sup> Two-thirds of businesses believe tech knowledge is key, but 21% of employers in the South East Local Enterprise Partnership area who reported skills shortages found basic IT skills lacking in candidates.<sup>xviii</sup> Over the next 15 years, a lack of high-tech skills at all levels could become a severe drag on Essex's growth potential.
36. Numbers of **self-employed could overtake public sector employees** in the 2020s. Self-employment accounted for more than half of jobs growth from 2008 to 2014. Essex currently has 109,600 self-employed people, or 11.3% of the working population, which is above the UK average.<sup>xix</sup> By 2030 it could become the dominant form of work for younger generations. The 'gGig' or 'sharing' economy is expected to have global revenues of £230 billion by 2025.<sup>xx</sup> These new forms of 'on demand' work in transport, home services, professional services, and hospitality could create a rapidly expanding cadre of 'flexible' workers that could change the shape of demand for infrastructure, increase self-employment further, and shift demands on public services. These changes interact with and accentuate trends such as homeworking. As people work at an older age, moving through different workplaces and career paths more frequently, attention will need to be paid to ensuring training is appropriate for all ages and those in periods of career transition.
37. Generational divides between the 'digitally native' young workforce (though entering their forties in the 2020s) and older 'print' generations will play out, for example, in the form of different demands upon services, expectations of life opportunities, and diverse workspaces. Essex's position as a thriving economy blended with valued public services depends on meeting these diverse needs. Currently, Essex has a GVA gap with the East of England of £2000 per head and over £4000 per head with the rest of England. These gaps may remain and could increase further unless a compelling employment, skills, local services, and business opportunity environment can be crafted.<sup>xxi</sup>

## Housing and infrastructure

38. The era of "Generation Rent" will see growing numbers locked out of property ownership. **Private rentals** could overtake mortgage-holders in the 2020s on the current trajectory. As younger people are increasingly reliant on short-term private rents and as property values

continue to rise, the gap between those unable to get onto the property ladder and property-owners may widen, hampering social mobility and exacerbating inter-generational conflict.

39. Half of 20-39 year olds live in private rented property, up from 20% in 2000. First time buyers have been hit by rising house prices and withdrawal of higher Loan-to-Value mortgages – increasing average deposits to £50,000. Housing completions have fallen markedly in the UK in last five years.<sup>xxii</sup> Essex has a more mixed picture currently, although some analysts point to a potential shortfall in housing of between 16,000 and 24,000 homes by 2022. Catching up in the rest of the decade will be difficult if this does indeed transpire.<sup>xxiii</sup>
40. At present, 11% of households in Essex live in privately rented accommodation<sup>xxiv</sup>. On current trends almost 30% of households (and the majority of 20-39 year olds) will be renting privately by 2030. On the other hand, more than 35% of the population, mainly older people, will own their homes outright - thus property wealth and the associated benefits are locked in to an affluent, older generation while younger working age people are excluded from ownership. This could be a source of tension and could stymie Essex's growth potential and lead to young buyers looking elsewhere for the opportunity to buy a home. It also undermines the long-term cost on services as younger generations fail to build a sufficient asset base to support their needs later in life.
41. Current rates of building will meet less than 60% of future housing need.<sup>xxv</sup> Essex has significant un-met need for affordable housing. There are more than 100,930 social homes in Essex, but there are almost half again, 47,233 people, on housing waiting lists. Around 7,880 have been waiting more than five years.<sup>xxvi</sup>
42. Growth in Essex could create increasing road and rail infrastructure challenges, which without major investment at pace, could lead to **gridlock**. Peak demands will push parts of the road and rail network beyond capacity by 2023.<sup>xxvii</sup>
43. Rail services on the Great Eastern Mainline will see up to 80% of standing capacity utilised at peak times between Chelmsford and London Liverpool Street by 2023. Services on the West Anglia Mainline will experience similar capacity issues between Harlow and Tottenham Hale. Capacity on the Essex Thameside line will reach critical levels by 2023.<sup>xxviii</sup>
44. Essex has the third highest road traffic use in Britain. Between 2013 and 2030 total passenger vehicle miles in the UK are expected to increase by 32%.<sup>xxix</sup> Key radial routes connecting Essex's main towns and cities are already a constraint with some routes exceeding their capacity at peak times. Without a significant shift in travel behaviours or modal choices, Essex's road and rail infrastructure could become a constraint on growth and opportunity.
45. **Replacement energy systems** are needed by 2030 to meet carbon obligations. Two-thirds of existing power stations are set to close by 2030, and capital investment on-and off-shore in Essex is forecast to exceed £40bn.<sup>xxx</sup>

## Health and well-being

46. **Obesity** is a major challenge. In Essex, 8.1% of children aged 4-5 and 17% of those aged 10-11 are obese. On current trends, by 2030, 1 in 5 school age children and 1 in 3 adults could be obese, with a high correlation with **poverty**.<sup>xxx</sup>
47. The NHS faces even greater **hospital overload** in the 2020s on current trends. In January 2016, 212,136 patients waited more than four hours in A&E – the highest number ever - yet 15 per cent of A&E admissions could have been treated in the community.<sup>xxxii</sup> Deployment of connected, assistive care incorporating new connected devices could help to manage some of these demands but will require investment, patient engagement and training.
48. Essex faces a quadrupling of **social care** need by 2030. Long term health conditions – rather than illnesses susceptible to a one-off cure – now take 70% of the health service budget. By 2030, the number of people needing social care in Essex is expected to rise from 35,000 to 137,500.<sup>xxxiii</sup>
49. **Personalised healthcare** could accelerate leading to a reconfiguration of services around patient-led demands. New technologies such as synthetic biology and gene editing could raise ethical questions, and questions about the allocation of resources.

## Environment

50. **Climate change** could bring notable impacts on agriculture, wildlife, communities, and migration by 2030. Essex has an extremely large coastline of over 350 miles. If sea levels were to rise, Essex could feel the effects more keenly than any other county. In Essex, more frequent incidence of **flooding** could lead to much higher costs and loss of homes and businesses by 2030. There will be significant demands on agriculture to deliver higher yields, with land and resources expensive and scarce, and frequent weather events threatening yields on a more regular basis.
51. Forecasts suggest that agricultural productivity will need to rise by 60% to feed the rising global population.<sup>xxxiv</sup> Governments have already begun to explore the potential for agri-tech to help meet this demand, with the development of precision agriculture techniques seen as a possible avenue.<sup>xxxv</sup>
52. There are also related health issues. Up to 1910, ague, a form of malaria, was common in the marshlands and lowlands. If malaria were to come back to the UK it could come to Essex and Kent first. The impacts of climate change and population growth both globally and locally specific are likely to be felt increasingly in Essex throughout the 2020s. It is likely to be a test for its community resilience, economic prosperity and ecological systems.

## Public safety

53. Forecasts suggest that cyber-attacks could cost the global economy up to \$90 trillion by 2030.<sup>xxxvi</sup> Police forces may need to work differently to combat both global **cybercrime and terrorism, and highly localised domestic violence** and safety issues around addiction and mental health. These safety concerns are often described as ‘hidden harm’ and they create

pressures on individuals, families, **communities** and services. Between 2011 and 2015, reports to the police of sexual abuse of children rose by 60% in England and Wales<sup>xxxvii</sup> with police forces struggling to cope with the extra demand. From a global perspective the worsening problem of human trafficking requires the police to work with agencies from many other countries far more effectively. Prosecutions for this offence are currently extremely rare.<sup>xxxviii</sup> Different challenges such as mental health, dementia, addiction, and domestic violence cross-over creating an increasingly complex picture over time. The complexity is not new but the degree to which it has become visible as data, professional training, and cultural norms shift is new. These trends and a welcome new culture of reporting 'crimes against the person' are driving increased demand for police and other services.

### Technology

54. Rapid increases in the number of **connected, autonomous and intelligent things** may start to impact on the way services are delivered. Robots that 'think' are likely to share the workplace or even take on some human roles by 2030. The World Economic Forum predict that 5% of cars will be driverless by 2025.<sup>xxxix</sup> Ubiquitous, connected devices (some estimates place this at 100 billion devices by 2025 including cars, appliances, public transport, energy systems, supply chains, health devices, agricultural machinery and much more besides) will collect **huge quantities of data**, which, combined with growing computational power and **analytic capabilities**, present many new opportunities for targeting interventions and influencing behaviour.<sup>xl</sup>
55. The convenience and immediacy of digital information and services, in turn creates new expectations and demands for public services to meet individual convenience and need. This raises questions about the digital 'have nots' who will diminish in number but still retain significant needs throughout the next decade and a half. Essex's leaders could take a laissez-faire approach to technology and its economic and social possibilities. The risk of such an approach is that Essex's people are placed in a position where they struggle to adapt to change and the potential benefits from better targeted, smarter systems of public services are missed.

### Public Finance

56. The **squeeze on public finances** is likely to remain. The response to anticipated Brexit may smooth the gradient of the decline as the 2020 central Government surplus target is suspended but, ultimately, it is forecast to prolong austerity.
57. With a loosening of national controls on borrowing and investment and greater control over some local taxes, a move to self-funding over the next decade is seen as a realistic proposition. Many councils are setting up housing development functions, using land and investment powers to meet housing need, including new social care housing, and generate income.
58. The combination of spending cuts and growing demand is placing existential pressures on public service organisations, forcing councils to think creatively and plan for a very different financial future. Rather than satisfying central government requirements for grant funding, councils will need to focus on the tax and revenue they can raise locally.

59. This will require them to focus much harder on building relationships with and between residents, businesses and service users, demonstrating responsiveness and value for money at every stage. It will be important to explain that each individual's position as tax payer or beneficiary of local services changes over their life time. A risk is that those who are required to fund services are unable to see direct benefits to themselves and clear benefits to others who receive the services they fund. The ability of public sector leaders to forge a stronger local consensus between funders and beneficiaries will be a high priority.
60. Through the devolution plans being agreed in Manchester and elsewhere we can see emerging models for public service collaboration designed to increase the efficiency and effectiveness of spending by enabling joint budgeting and planning. In the absence of such deals, local public service leaders must find ways of increasing the effectiveness of public spending by aligning budgets that are managed through different funding streams and accountability regimes. Leaders will have to increase the scale and depth of collaboration and find ways to focus all public resources on achieving shared priorities.
61. A key point to note here is that public budgets are distributed in an array of forms. For example, NHS budgets are designed to meet demand but local authorities, with a reserve base or with funds acquired through fees and charges, asset sales or planning gain, may have more scope to undertake capital investments to secure future revenues and social outcomes. Coordinating these capital and revenue flows, for example in health and social care, in new ways will be necessary if cuts are not to be felt in an even more severe fashion.
62. There is a danger that in an ongoing environment of financial constraint, public services focus on supporting the vulnerable at the expense of providing good quality universal services which are valued by all citizens. This can lead to resentment from those paying the taxes. Getting the right balance is an ongoing challenge for political and service leaders. It requires an ongoing debate with the community about what is most valued and how public resources are best spent to enable communities and individuals to flourish.
63. The drive for savings is likely to push the adoption of **digital public services**. The Cabinet Office estimates that making transactional government services digital by default could save between £1.7bn and £1.8bn.<sup>xii</sup> But applying digital technology to existing services (designed for an earlier age) is the wrong way of looking at it and can increase costs - leading to poor services, expensive implementation and frustrated service users. Rather, leaders need to ask "what are the problems that digital solutions can help solve?" By involving the users of services from the outset, services can often be radically simplified, exploiting digital technologies to enable rapid coordination, improve communication and cut administrative costs.
64. To move public services to a new digital culture of self service will require upfront investment in skills and infrastructure. A fully digital public service will require shared strategic platforms:
  - a. to support community collaboration and communication around shared issues or local areas (e.g. village forum, MumsNet);
  - b. to enable effective shared management of individual cases (e.g. for at-risk children);

- c. to support employees to collaborate and work flexibly out in the community using mobile technology (e.g. multi-professional teams working with elderly people or domestic abuse); and
- d. to enable sharing of data and analysis so services can constantly learn, adapt and improve (e.g. to tackle child obesity).

## Culture and society

65. **Loneliness and social isolation** reduces life expectancy, increases cognitive decline and depression and leads to greater use of health services. The number of people who are lonely is forecast to grow to 1.5 million by 2035,<sup>xliii</sup> with over 15,000 households in Essex currently at high risk.<sup>xliii</sup> An ageing society is one driver of this isolation but by no means the only one - it also affects younger groups.
66. More than half the population now use on-line **social networks** with the highest use in younger age groups. Ofcom's data shows the prevalence of social media in daily life, with 72% of adult internet users having a social media profile. Facebook is the most used service and 20% of adults say they use it more than 10 times a day. Young adults (aged 16-24) have a more extensive breadth of use of social media and are adopting newer sites and services such as Twitter (40%), WhatsApp (37%), YouTube (32%), Instagram (35%), Snapchat (26%), Tumblr (8%) and Vine (4%).<sup>xliv</sup> The difference between the younger and older generations is that the younger users who have grown up in a world with ubiquitous social media and connectivity experience the internet and social networks in a completely different way. Augmented reality is part of the way young people experience their day to day life, as opposed to older generations (although they are using social media more and more) where it is an add-on to their lives to a large extent. They are also much more likely to understand, and be concerned about, their privacy on the internet with a far greater amount of younger users changing their privacy settings away from the default settings compared to older people.<sup>xlv</sup>
67. Young people in particular are seeing themselves more as global citizens with 47% of those in the UK agreeing with the statement "I see myself more as a global citizen than a citizen of my country".<sup>xlvi</sup> In the EU referendum, 75% of young people aged between 18 and 24 voted to remain in the European Union whereas 61% of those over 65 voted to leave.<sup>xlvii</sup> Youth participation in national elections has increased in recent years at a higher rate than the general population with 38% of 18-24 year olds voting in 2005 rising to 58% in 2015.<sup>xlviii</sup> Policy makers need to engage in a more effective way with young people to ensure that they are involved in the political process.
68. Social media is ubiquitous, but its impact is neither fully realised nor yet understood. A survey for Anxiety UK found 53 per cent of respondents changed their behaviour due to social media, and 51 per cent said the change had been negative, with some symptoms similar to addiction.<sup>xlix</sup> According to Enough is Enough (EIE) - an organization that aims to make internet use safer for children and families - 95% of teenagers who use social media have witnessed forms of cyberbullying on social networking sites and 33% have been victims of cyber bullying.<sup>1</sup> Some

researchers believe social networking sites could have positive effects on mental health. Research from the University of California San Diego (UCSD) found that happy status updates encourage other users to post happy status updates themselves.<sup>li</sup>

- 69. Social networks change the relationships that people have with one another for good or ill. The challenge for Essex is to understand how to use the potential power of citizen voice and peer-to-peer contact through social media in a way that reduces isolation. Essex’s educational, cultural, policing and political leaders will want to ensure that social media is used to bring people and communities together whilst minimising any potential harm from bullying, cultural antagonism, and corrosive attacks on the public interest.
- 70. Public **confidence in data-sharing** is fragile - 44 per cent of the population are more worried about risks to their privacy and security than the potential benefits.<sup>lii</sup> This is not surprising when according to IT governance, a website that logs cyber attacks “The number of data breaches is growing every day. While organisations struggle to keep their and their customers’ data safe, criminal hackers are already selling that data on the dark web.”<sup>liii</sup>
- 71. Debates about data will no doubt rise up the agenda over the next few years. For example, a recent article argued that citizens have insufficient control over their personal and medical data and to restore individual rights we might consider the idea of a “data trust”: a mutual organisation formed to manage data on its members’ behalf.<sup>liv</sup>

**An overview of likely challenges emerging from the trends**

- 72. If we apply the key trends to our earlier assumptions about broad direction of travel in the 2020s then a more detailed picture of the likely future begins to emerge.

2020s ‘a rocky settling’?	
<b>Economy</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Complete connectivity, AI, automation and big data analytics are highly likely to create new economic opportunities across all sectors in Essex.</li> <li><input type="checkbox"/> From an individual perspective, these opportunities will create <b>new forms of work</b> – some highly advantageous, some highly uncertain.</li> <li><input type="checkbox"/> A changing pattern of work creates challenges of adaptation for Essex – its skill base, its ability to form growing businesses, its ability to move into nationally and internationally competitive markets.</li> <li><input type="checkbox"/> Technology and global power shifts will test the post-crash economic management/regulation model and there is very likely to be continued volatility.</li> </ul>

Technology	<ul style="list-style-type: none"> <li>❑ Technological changes we are seeing are likely to have wide impacts by the end of the 2020s (compare our relationship now with 2000 and imagine even faster change).</li> <li>❑ <b>Our relationship with technology, with our sense of ourselves, with one another</b>, with work and enterprise, with public services, health, education, and welfare <b>will all be changing</b> as they are now - but likely to be <b>at a faster pace</b>.</li> <li>❑ These changes will create both opportunities and pressures for individuals, communities, politics, public services, and other employers.</li> <li>❑ For public services particularly, digital by default will impact service efficiency, professional roles, our relationship with the public, and the ability to foster wider social, personal and economic impacts.</li> </ul>
Public services	<ul style="list-style-type: none"> <li>❑ A local landscape facing <b>continuing service stretch</b> as demands increase and change (not least through user expectations).</li> <li>❑ The Whitehall legacy is likely to remain with service fragmentation and division despite cross-service challenges.</li> <li>❑ Where demands change rapidly and resources are not forthcoming, service short-falls become increasingly likely.</li> <li>❑ Resources can become more volatile on a local level as finances become more locally determined- especially if the economy falters.</li> </ul>
Governance	<ul style="list-style-type: none"> <li>❑ Leadership will be pulled in two directions - both under greater popular pressure and needing to co-ordinate and act for the long-term.</li> <li>❑ There will be <b>mismatches and uncertainty</b> between structures of different services, and tensions between layers of governance (local, sub-regional, regional, national, global).</li> <li>❑ Leadership will emerge in many different ways – sometimes it may not be from formal structures.</li> <li>❑ The ability to innovate new forms of systemic and collaborative leadership between services, business, the voluntary sector and the community come to the fore.</li> </ul>
Demography	<ul style="list-style-type: none"> <li>❑ An <b>old and young population ‘bulge’</b> creates demands and needs to which society and services will need to respond BUT increasing expectations of the <b>middle majority</b> should not be underestimated.</li> <li>❑ Migration continues to flow from both London and overseas with an impact on both the profile of the population and, consequently, the range of values held</li> <li>❑ <b>Diversity naturally increases</b> – especially in the west of the county and its urban centres.</li> <li>❑ This diversity comes in many forms – generational, ethnicity, urban/rural. There may be a risk of conflicts without careful management.</li> </ul>



## Society

- **Divides** are likely to become increasingly apparent: secure v insecure, home owner v renter, baby boomer v generation z, lonely v socially supported, and 'communitarian' v mobile.
- The challenge for Essex is to help **meet the aspirations** of the upwardly mobile and **paying heed to the security** and well-being of others who may otherwise be 'left behind'.
- New inequalities are likely to open up between the asset, capital and skills rich and those without access to assets, capital and who may be suffering economic disadvantage resulting from lower skills levels.

73. The key trends point to abundant opportunity for Essex to capitalise on economic and technological change to meet the needs of its citizens, but they also appear to signal significant social, institutional, and political challenge.
74. We would summarise the key challenges as:
- a. **An economy which is re-structuring** with new industries, jobs and opportunity but uncertain foundations and likely transitional stresses.
  - b. **Technology changing our relationships** with each other, work and services.
  - c. Public services facing new possibilities but **new demands and expectations** with still limited resources.
  - d. Governance with **new powers** at the local level **but uncertainty** about how they can be best deployed and a search for new models of systemic leadership.
  - e. A changing population that exhibits **dynamism** and enjoys **longevity**, but creates new **demands** such as those resulting from isolation or social and cultural change.
  - f. A society that is **plural but divided in many ways** creating stresses and some **conflict**.
75. But the potential consequences of the trends that have been identified are not determined. The degree to which Essex can exploit the opportunities that these trends offer and minimize the risks, rests on a series of choices that Essex's public, private and voluntary sector leaders are able to make.

## What do the trends mean for Essex's partners?

76. The way in which Essex can respond to these trends will to a large extent depend on its capacity for collaborative action, across organisations and sectors, and in partnership with national and global players. The presence of strong relationships, shared capabilities and a willingness to act will be important criteria in assessing areas to prioritise.
- 77. More than 100 leaders from Essex came together on April 26th to discuss the emerging future trends. In some areas, particularly health/social care and data sharing, there was a strong consensus about the nature of the challenges and the responses that are required. In other areas, the response was not so clear. Discussions raised questions and posed challenges for leaders in articulating a pathway to address the key challenges and opportunities facing Essex.**
- 78. In this section we use the data from these discussions alongside some additional analysis to explore the implications of the future trends and address the questions:**
- a. **what do these challenges mean for the partners' relationship with Essex's public?**
  - b. **what do they mean for partners' relationships with each other?**
  - c. **What do these challenges mean for partners' relationship with Essex's public?**
79. Essex partners are aware of, and accept, that the role of the state must shift to become more of a facilitator and broker, creating platforms to enable communities to do things for themselves, rather than designing new services to deliver to them. As one participant put it:
- “Strong communities can solve these issues, not just strong state institutions.”*
80. In accepting this change in role, public sector leaders will have to rethink the way that they work in quite fundamental ways, challenging much instinctive practice and conventional approaches which plan, budget and deliver in predictable ways.

### ***Public services as an open, enabling system?***

81. The potential of a “platform business model”, with open data and communities able to analyse issues, develop their own services and provide applications, has yet to be pursued to its logical conclusion.
82. Digital public services lead to an opportunity to link up public services and create single public service platforms connected to voluntary sector organisations. This strategy would be predicated on better connectivity and infrastructure – especially in the more rural parts of the county. Partners at the summit identified a need to collectively understand the extent to which open data can be used as a tool to engage communities and unlock knowledge that is presently ‘locked up’. Sharing data creates transparency and reduces control from institutions. Predictive data could help Essex map and deliver support packages. Partners had some concerns about how to protect more vulnerable people in an open system. Enabling services can miss vulnerable people and the gap is widening between vulnerable people and others within our communities. In contrast, others felt that big data could be used to plan, focus and predict

vulnerability and define interventions by, for example, using data from tele-medicine. But there are questions to be addressed about who acts on the data, how, and what they do as a result.

### ***Shifting the relationship between state and citizen?***

83. Partners recognise that the nature of the relationship between state and citizen will shift as people are increasingly expected to do things independently with public services focused on supporting those who are vulnerable. They identified a question about how to manage customer expectations when the general public view tends to be that public services should be a first not a last resort - the model is currently a 'consumer-oriented' one where the prevailing view is 'I pay and the service delivers' rather than a 'citizen-oriented model' of 'how can I work with the tools available to me to meet mine or the community's needs?'. Both citizens and services would have to recast their relationship for this shift to effectively be achieved.
84. Some Essex leaders felt services should not be afraid to move from public services alone to a plural approach with public and private service pathways as options – taking an example from Australia, you can choose either or both, but choose your own route. Partners identified the need to address the use of terminology – viewing residents as 'customers' means by definition that the Council is a 'provider'.

### ***Digital by default and design?***

85. There was widespread acceptance from partners that, increasingly, digital access will be the norm. 2030 senior citizens will be more adaptable to technology. Opting out will represent a choice rather than vulnerability. By forcing people down a digital route, some people will be excluded but the numbers will diminish. Participants gave examples of existing models for offering a flexible approach to support, from easily accessible on-line help and videos through to personal hand holding to demonstrate how processes work.
86. As this model is developed, digital by default will change the way communities experience public services which may increasingly be about providing data, tools, and linking up people and organisations as opposed to linear delivery of services. Professionals will need to become more adept and skilled at gathering and analysing data, developing targeted responses, measuring impact, and communicating through a variety of social media. Case management may, with appropriate controls for privacy and vetting, be shared between organisations to enable more timely, cost effective, and preventative interventions.

### ***Increasing personal responsibility for health and wellbeing?***

87. The challenges of an ageing population prompted discussions at the Summit about changing attitudes to ageing, but also the need to build in good habits throughout life so that people stay healthy and active as they age. There was a sense that people must prepare for good health and wellbeing now. Partners discussed a much greater visibility of one's own health and the possibility for an ethos of self-management. Data is starting to enable people to be more responsible for their own health and well-being. Building on health checks, we will increasingly be able to use technology to monitor health and wellbeing – with growing understanding of genetics, use of wearables and tests at home.

88. Participants felt there is still a lack of understanding of how to prevent childhood obesity and a need for greater understanding of what is happening in the years between five and ten that makes the obesity rates climb so dramatically. The role of public health is important as are the wider determinants of health such as poverty, education etc.
89. Socio-economic factors – inequality, lifestyle, poor self-esteem and worklessness drive demand for services. People need to stay physically and mentally active. Research shows if you play music or learn a language the chances of developing dementia is reduced. Partners see a risk in a non-active elderly population. Many older people will be expected to work longer, either in paid or voluntary work. A key challenge is to ensure older people play a fuller part. Making a positive contribution gives meaning to life and aids recovery. Participants felt that communities across Essex will need to change the way work, assets, skills, and time could be deployed to support the ‘sharing economy’ model such as the Casserole Club<sup>iv</sup> or the Library of Things<sup>vi</sup>.
90. The challenge is how to shape an environment in which older people can play, learn and stay involved, with opportunities for life-long learning, bringing together young and old, with provision for mature students in spaces to engage, involve and contribute. For example, The University of the Third Age is a good outward facing model.<sup>vii</sup> Essex could develop intergenerational strategies where young people are connected to older people to share skills and reduce loneliness and isolation.
91. There will be a demand for different forms of living as the population ages. This may challenge the types of housing and facilities that are needed. Older people own much of society’s wealth with assets which can be released as they seek different living support. A distinction could be made between vulnerable elderly people, who will need increased care and community support and active older people, who are able to and want to remain active and engaged in purposeful activity at an old age – including voluntary action to support others and the local community. Changing family structures can support both groups, but this also requires a change in the types of houses built, which often do not meet the needs of intergenerational family structures. There is also a social class element to this, as those in social housing do not have the ability to have their parents or children move in with them.

***A local curriculum to meet the needs of the early mid-21st century?***

92. Many participants responded to the skills trends by asking:
  - a. How do we create an education system where people (education professionals and parents) are the problem-solvers and decision-makers?
  - b. How do we build skills later in life?
  - c. How can we challenge the education-system?
  - d. How can we narrow the ‘achievement gap’?
  - e. How do we ensure greater opportunities for lifelong learning?
93. A concern was articulated that a disconnect between a complex education and skills system, and employers sometimes means those setting curricula and advising young people are not

being informed by the needs of employers. Qualifications and patterns of learning struggle to keep pace with rapidly changing markets. Even in industries such as construction, often the skills being taught are already irrelevant by the time employees go to work.

94. Higher education could shift away from the focus on a “degree” towards a more modular approach to continuing personal development and lifelong learning. University has value as an experiential training ground, but learning and skills development, often delivered online, will continue throughout life as people have many careers. Increasing automation and the use of artificial intelligence in the workforce means the skills that will matter will be those that involve problem-solving, empathy, or innovation and creativity.
95. Participants feel that local authorities have been squeezed out of a role in schools. Some participants in the Summit saw schools as increasingly ‘exam factories’ and questioned whether local authorities and their communities might have a role to shape the education curriculum. There was some concern expressed that there needs to be an ‘Essex vision’ of an education system that prepares young people for lifelong learning, encourages deep learning through problem solving, and develops leadership of place in young people. Support was articulated for an educational ethos that supports the county’s educational leaders to explore education that sees young people in relation to the family, community, education and society rather than as simply individuals.

#### ***Polarised working lives?***

96. In considering the future of work and skills participants raised concerns that in the future society may become more divided between the ‘haves’ and ‘have nots’. We could see a two-tier workforce where those with the skills and means to work flexibly benefit and those with lower skills who are still wedded to a place of work get left behind. Skilled workers can more easily take advantage of flexible working to suit their preferences. As it becomes increasingly easy for people to perform tasks at home, Essex could develop a more sustainable model of home-based working and fewer cars. But there needs to be consideration of the equity dimensions of any policy so that all sections of society can access these new opportunities.

#### ***Strength in diversity?***

97. Inward migration will generate a much more diverse population, both BAME and socio-economic status. Participants recognise that Essex communities will need to be much more resilient to support cohesion. There was a feeling that Essex should look at what can be learnt from elsewhere. Essex feels the pressure of migration from London – on housing, welfare and job availability. But people’s perception of the challenges of diversity may be greater than the reality.
98. A particular challenge could be segregated communities – housing estates where only one ethnic group is prominent. Integration as a model (over –multi-culturalism) has gained ground in recent years, but Essex will need to be clear about its own approach to demographic (and cultural) change. Possible responses include ensuring that public services mirror the demographic make-up of the Essex population.

## **What do the challenges mean for Essex partners relationships with each other?**

99. A strong message came from several discussions at the Summit – “enough talking, now it’s time to do”. One group summarised a collective desire for action to build effective collaboration:

*“It’s not about structure, it’s about priorities. All people round the table have shared priorities in providing support for the vulnerable in Essex and reducing costs. All share the benefits of working together and sharing reward”.*

100. Future public sector collaboration will require shared data platforms and a shared public service ethos and may need the innovation of new special purpose organisations.

### ***Rapid action to harness benefits from data sharing***

101. Many of Essex’s public service leaders have seen the power of big data and data sharing and want more of it. For example, data sharing to reduce fraud from the single-person discount on council tax saved councils money from loss of revenue and reduced the resources needed to investigate people for fraud. We found a shared desire among Essex Leaders for rapid action.

*More data sharing is better than less. Let’s make this happen and make it happen quickly.*

102. Shared digital platforms may reduce cost and make data sharing easier. Partners want to harness and share data to target services better and focus on prevention. There have been lots of pilots but it was felt that they take too long to get off the ground. Acceleration of these pilots and prototypes will require investment, skill and resource to make it happen. Data takes time to analyse and it can be disruptive and surprising. It has the potential to radically change what public services deliver, when, where and how. Two priority areas were identified - a single health and social care record, and linking police records with data on public safety and care needs, such as dementia.

### ***Big Data requires analytic capacity and could challenge business models***

103. Partners spoke a great deal about the challenges and opportunities associated with data. They felt there is a fundamental need to educate people in data literacy. Data should be opened up to researchers and universities, and the Council should do more data mining, in partnership with Essex University and others. For the voluntary sector, shared data would help them to better plan their activities and also determine how impactful (or not) they’d been. But the voluntary sector sometimes lacks the resource to analyse data properly, so more support for analysis is required.

104. Partners felt that difficult issues are likely to arise around sharing and analysis of data and these will need to be worked through. There may be moral issues. As one participant put it, ‘The technology can work at a faster pace than our moral concerns can deliberate’. There could be a situation where analytics challenge accepted structures. It could be culturally uncomfortable. Partners will need to work through the issues to develop an appropriate business model for data-sharing – sooner rather than later.

### ***New ways of working to enable more shared services projects***

105. Partners felt that more joint services configured and commissioned around people and needs that bring the various services together could help meet many of the challenges posed by emerging trends. This is already happening with family solutions where a multi-professional team listens to issues faced by a family and works together to solve them. But it takes a huge amount of commitment and hard work.

106. One approach suggested was to start small with shared services around a new social enterprise or self-contained projects that contract employees in a different way. The approach would be to develop small initiatives and target specific projects, get people on board, ring fence funds early and get a pool of money from each of the services kept under one budget. This approach would require sophisticated system-mapping, data use, and impact evaluation.

### ***Single public service contract based on common identity***

107. All public sector organisations exist to serve the population of Essex but the individual citizen has to interact with many different services. Different roles and working practices within the public sector currently require very different contracts. This creates a barrier to working flexibly and collaboratively, and wastes time and money. One idea that emerged at the Summit was to create a standard Essex-wide employment contract, so partners can go straight into a joint project without having to negotiate the legal details.

### ***Flexible working practices***

108. Changing work practices are seeing the end of typical 9-5 days. Sunday afternoons are the most popular time for people to log on and complete housing benefit forms. Partners questioned how and when people will choose to interact with customer services and public bodies in a world with more flexible work. Traditional 'peak' times might change. The public sector needs to put policies and practices in place to respond to the opportunities flexible working could bring - better contracting and employment arrangements to allow public bodies to work in the new world of the 'gig economy', bringing in skilled people for specific purposes, shorter contracts, more flexible roles etc. Partners shared a desire to explore how to create contracts that allow more flexibility and less governance.

### ***A shared care system***

109. 'Community budgets' are being trialed but partners expressed support for a shared organisation rather than relying on pooled resources and shared responsibility. Clinical Commissioning Groups are setting up an Accountable Care System (ACS) to pool risk and rewards and bring a whole care system (GP, consultants, ambulance services, health promotion, peer support, volunteers) under one structure. An ACS is about strengthening communities as much as it about improving health outcomes and saving money. Partners shared a desire to trial this approach across other public services.

### ***Future Essex governance – collaborative or competitive?***

110. External forces may be pushing Essex councils into a more competitive environment due to scarcity of resources and lack of broader institutional capacity. But wins are likely to come

through greater collaboration – across councils and with communities - which may be difficult to achieve. Some partners commented that the tactical responses from national political structures - rationalisation, centralisation, public bodies more remote from communities - make collaboration more challenging. They noted that competitive tensions may be created by competition over business rates across borders. But participants felt that it was important for Essex leaders to pursue a collaborative agenda and work for the longer term benefit of citizens beyond cycles of political leadership.

111. If decision-making on a local level is collaborative, new forms of accountability will be needed. For example: where community organisations and their volunteers take over service delivery the commissioning organisation see this as the new “normal” and count a saving, without understanding the impact of this cost transfer on the community organisation, its volunteers, and its beneficiaries.
112. The voluntary sector/community represents a huge untapped capacity but Essex partners sometimes find it difficult to engage them due to lack of coherence and leadership. Partners saw a missed opportunity to harness the power of the Voluntary Sector. Summit participants expressed a desire to explore whether an Essex-wide interface or VCS representative Board could be created to support better engagement and ensure resources can be directed more effectively.

### **Overview**

113. The trends that this process has already identified have led to a series of fundamental strategic questions about how partners should respond. There is a strong sense of possibility that relies on different ways of working, co-planning, coordination and possibly even exploration of models of co-funding. Partners are considering, in profound ways, their relationship with one another and Essex’s communities.



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<sup>lvii</sup> The University of the Third Age (U3A) is a self-help organisation that provides, life-enhancing opportunities for retired and semi-retired people to come together and learn together. See <http://www.u3a.org.uk/u3a-movement.html>

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