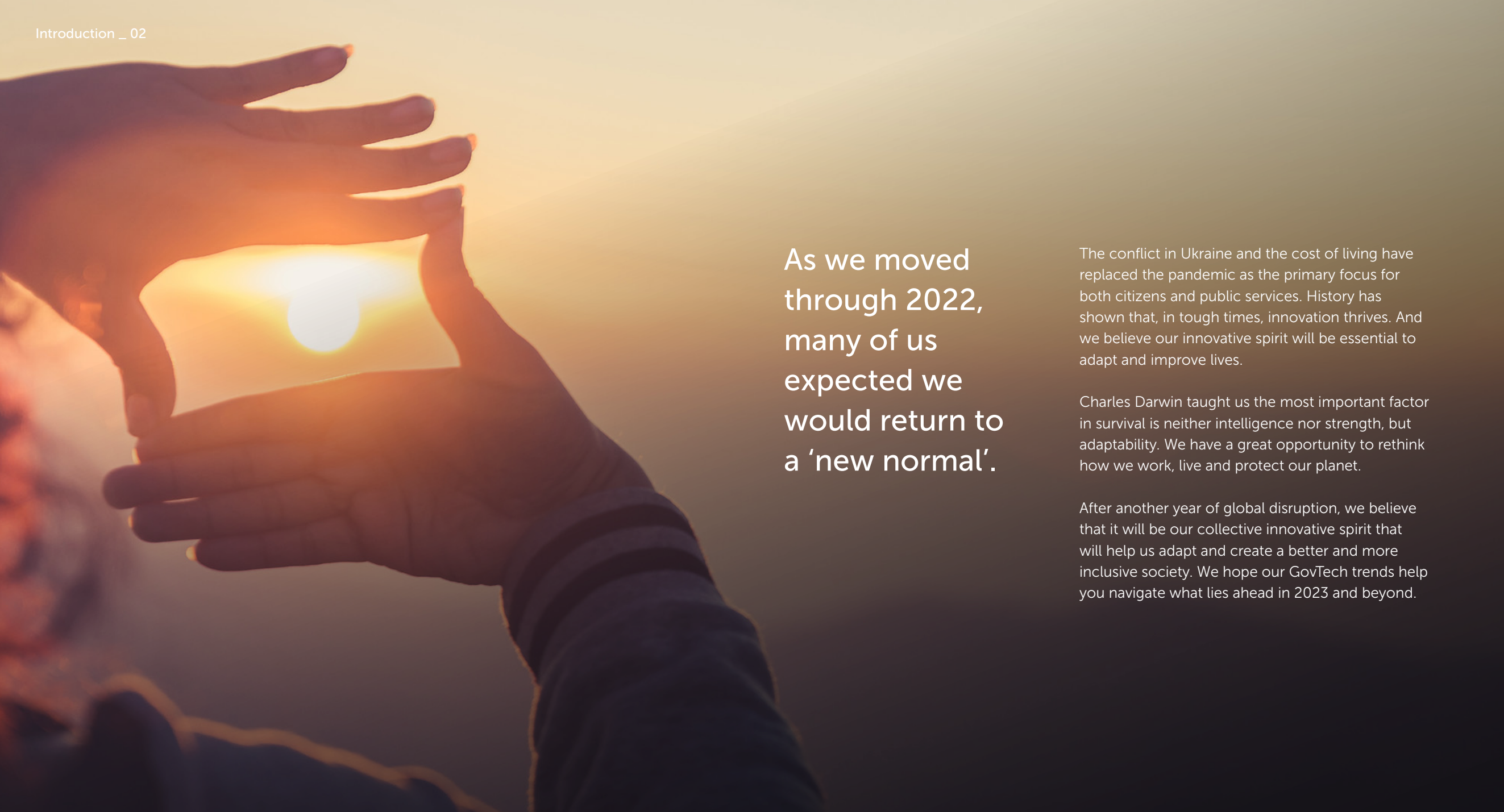


GovTech trends:

# 2023

Adapting for a more sustainable and inclusive future

A close-up photograph of two hands, one from the left and one from the right, cupping a bright, glowing orb. The background is a soft, warm sunset or sunrise sky with a large sun partially obscured by the hands. The lighting is golden and ethereal, creating a sense of hope and care.

As we moved through 2022, many of us expected we would return to a 'new normal'.

The conflict in Ukraine and the cost of living have replaced the pandemic as the primary focus for both citizens and public services. History has shown that, in tough times, innovation thrives. And we believe our innovative spirit will be essential to adapt and improve lives.

Charles Darwin taught us the most important factor in survival is neither intelligence nor strength, but adaptability. We have a great opportunity to rethink how we work, live and protect our planet.

After another year of global disruption, we believe that it will be our collective innovative spirit that will help us adapt and create a better and more inclusive society. We hope our GovTech trends help you navigate what lies ahead in 2023 and beyond.

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{ On trend?

Last year, we published our seven trends for 2022. Looking back, let's see how we got on.

## So, how did we get on?

### 01. Personalisation as a service



We've seen citizens' demand for round the clock access to public services increase. So has the expectation of more personalised services, as reiterated in our 2023 trends.

74%

of citizens feel frustrated when website content is not personalised

[YouGov](#)

### 02. AI + Human Collective Intelligence = ?



The augmentation of people by data and machine indeed grew in both use and acceptance. However, it hasn't quite happened at the pace we believed it would.

83%

of public sector leaders are able and willing to adopt intelligent technologies

[Accenture](#)

### 03. Embracing the hybrid life



The hybrid life trend continued in 2022 and we see no sign of this changing. Now, we have an opportunity to redefine our working patterns.

78%

of employees said working from home improved their work-life balance

[Office for National Statistics](#)

### 04. A smarter society



The impact of smart devices in society is ever more evident whether through contactless transactions, home automation or, simply, our Smartphones. It is part of most people's daily lives.

90%

of public sector leaders said connected devices can benefit their sector

[Civica](#)

■ Not right ■ Somewhat right ■ Nearly right ■ Right

### 05. Trust as the new currency



Personalised services depend on data sharing, and many citizens don't trust the public sector with their data. Whilst it is the currency, going forward more needs to be done to gain that trust.

38%

of Australian citizens trust their national government with their data

[OECD](#)

### 06. Supercharged digital democracy



The impact of social media is clear, but we didn't see quite the broader citizen engagement we had in mind. Society has a responsibility to ensure all citizens are heard, not just the loudest.

56%

of global citizens say their political system needs to be completely reformed

[Pew Research Centre](#)

### 07. Rising social consciousness



Social consciousness around climate change is very visible. Yet, the cost of living crisis has become so front of mind, we believe some other topics have taken a back seat.

75%

of adults in Great Britain said they were worried about climate change

[Office for National Statistics](#)

■ Not right ■ Somewhat right ■ Nearly right ■ Right

## Our overall score



# Our innovation highlights

History has shown that in tough times innovation thrives. Our Perspectives\* series highlighted a number of interesting innovation stories that helped the public sector adapt and improve lives. Here's a few of our favourites.



## Building virtual hospitals

Sydney Local Health District opened New South Wales' first virtual hospital for patients and carers.



## Tackling domestic abuse

The Essex Partnership unlocked the power of data with machine learning to tackle domestic issues earlier.



## Keeping residents safe

Maryhill Housing used connected technologies to increase digital participation and reduce the risk of fuel poverty.



## Personalised learning

Sparx Learning used machine learning to create personalised journeys and improve every learner's maths experience.

# Our 2023 predictions





# Our seven trends for the year ahead

01

## Survival mode switch 'on'

With the cost of living crisis upon us, we have moved into survival mode. [Learn more >](#)

02

## On-demand living

Citizens' expectations of personalised and always-on services continue to rise. [Learn more >](#)

03

## Insight into greater actions

Data volumes are growing, but remain largely untapped in the public sector. [Learn more >](#)

04

## To trust or not to trust

Many citizens still don't trust public sector organisations with their data. [Learn more >](#)

05

## COPing with green

Concrete plans are lagging behind governments' carbon commitments. [Learn more >](#)

06

## Social altering democracy

Democracy is (too) slowly adapting to social platforms shaping civic opinion. [Learn more >](#)

07

## Redefining our working patterns

We need to balance flexibility and security in our world of hybrid working. [Learn more >](#)

## Key enabling technologies



Identity management



Blockchain



Data analytics & machine learning



Chatbots & conversational AI



Virtual & augmented reality



Connected devices

# 01. Survival mode switch 'on'

## Key technologies



Data analytics & machine learning



Connected devices



Chatbots & conversational AI



In 2022, inflation reached levels not seen in 40 years. With spiralling living costs around the world, and many people having to choose between eating and heating, our society has moved into survival mode.

Public service organisations have to focus on supporting those most vulnerable, while also combating their own rising costs and reducing budgets. We believe more efforts are needed to drive productivity, and therefore greater adaptability and technology-enabled innovation will be paramount. More can be done with what is available, whether through better use of assistive technologies or modernising existing applications.

Public services will also need to look at increasing self-service, reducing red tape, and improving data sharing and interoperability to drive better insight and faster actions.

Finally, in the spirit of 'the total is more than the sum of the parts', we expect that more public services organisations will partner and collaborate to create scale.



 71m

people around the world have been pushed into poverty due to rising living costs. [United Nations](#)

# 02. On-demand living

Key technologies



ID management



Chatbots & conversational AI

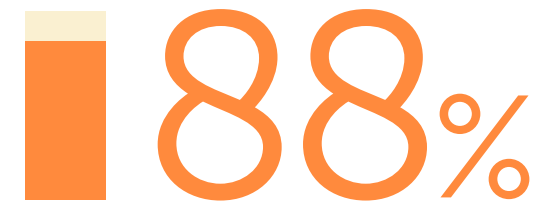


As highlighted last year, we believe people's expectations for personalised services have increased.

24 hour availability is now the norm in the consumer space, and we expect the same round the clock self-service in how we interact with public services.

Done well, personalisation offers great opportunities to improve experiences. This will require more data sharing, and technology will be paramount in making this possible in a safe, secure, and transparent way.

Personalisation, by essence, requires some form of identification to verify and offer a tailored approach, so identity management technologies will become increasingly relevant in 2023.



of public service leaders agreed service personalisation is important. [Civica](#)

# 03. Insights into greater actions

Key technologies



Data analytics & machine learning



Connected devices

The public sector has access to enormous amounts of valuable data. Yet, often, this data is not used to its full potential.

Real-term budget cuts are a reality, and as a society, don't believe it's sustainable or fair to expect nurses, teachers or civil servants to work harder to cover for the decrease in funds. We keep true to our belief that civil servants should be able to prioritise their time where human interaction is most needed. How can we help? Unlocking the value of data is one key area.

Data can, and needs to, be turned into actionable insights, starting with where automation can deliver better and faster results than humans can. One of the main barriers remains - poor levels of data sharing and interoperability between systems and organisations.

Moreover, we need to focus more on the predictive value of data as prevention is both cheaper and less painful than curing. We also believe higher priority should be given to improving our standards, skills and sharing of this vital resource.



[ 64% of UK civil servants confirmed that the perception around the value of data has improved since the pandemic. [Civica & Dods Research](#) ]

# 04. To trust or not to trust

Key technologies



Blockchain



ID management





Many of us share personal information with Uber, Just Eat, or our bank. We trust them with our data, and in return get access to services that make our lives easier.

But here lies the crux: without our data, organisations cannot deliver these smart services. Trusting an organisation with your data helps them deliver better services. But when it comes to public services, that same level of trust is not always there.

As published by the OECD, only 40% of the UK population trust their government. It's a figure that varies across the world - rising to 61% in Canada, but then dropping back to 41% in the USA.

To counter this fear, the public sector needs to better explain why they need our data, reassure us that it's secure, and explain the value we will get in return.



of citizens in G7 countries do not trust their government. [OECD](#)



# 05. COPing with green

Key technologies



Data analytics & machine learning



Connected devices



Blockchain

 44%

of UK citizens feel the UK will meet its Net Zero targets. [Civica](#)



Social consciousness around climate change has been on the rise for years. Recently, the cost of fuel and energy further increased people's willingness to be more environmentally conscious.

Most governments have made carbon neutrality commitments (e.g. Paris agreements, COP) and many public sector organisations have made their own. So, change is expected.

With every commitment, comes a plan. Yet, many organisations do not know how to calculate the extent of their carbon footprint, or other environmental impacts, let alone make a credible plan to achieve neutrality.

To add to the complexity, citizens are more sensitive to greenwashing and vague commitments. The public sector needs to build on initial progress and start converting their ideas into green actions.

WE NEED  
A CHANGE

## 06. Social altering democracy

Key technologies



Connected  
devices



Virtual &  
augmented reality

Social media has changed how we interact, consume media, or are kept informed. There's no denying it also had a significant impact on political engagement.

While being able to reach new demographics, social media has also increased polarisation, populism, and distrust in institutions. From the Arab Spring to the US Capitol and Brazil riots, or even elections and referendums, social platforms continue to shape civic opinion. In times of crisis, they can also disseminate information (real or fake) very quickly, as we saw during the recent pandemic.

We believe social media's influence on our democracy and public institutions will continue to grow. It will be important for public sector organisations to not only be more present on social platforms, but also take the lead to ensure they are safer and add more value to everyone in our society.



of the world's population  
use social media. [Statista](#)

# 07. Redefining our working patterns

Key technologies



Virtual & augmented reality



ID management





 83%

of employees say they are more productive working from home. [Intuition](#)

Many of us now share our professional lives between home and the workplace. We don't expect a massive return to the workplace to happen this year or the next.

Office days are more focused on interaction, meetings and workshops which impacts both usage and layout of office space. For many organisations, this has also meant offices are less busy and opens the question of what to do with the available space.

As we spend more time at home, social media is likely to have an increasing impact on how we interact with others. Will Web3 become a relevant part of our lives or just the latest buzzword in 2023?

As we continue to adapt to this hybrid world, the public sector needs to balance flexibility with rising cybersecurity threats. More thinking is needed to reuse work spaces, with more digital infrastructure improvements to connect the hybrid worker.



## Mind the \_ gap

As we share our seven trends, one area we need to pay close attention to is the risk of a bigger digital divide.

Whether linked to finance, digital literacy, disability, or infrastructure, it's a topic that we all can, and should, work together to address.

A crucial challenge for GovTech is ensuring these technologies are available to everyone, especially the most vulnerable or isolated. Beyond the obvious need to make tech available to people who cannot afford them, essential efforts revolve around driving connectivity in places not currently covered by broadband or 5G, and improving eAccessibility.

But even if everyone has affordable access and great connectivity, it won't help people who feel they lack the necessary skills to use tech. This is where the education of our communities comes in, and it starts by highlighting the benefits of being online, as well as overcoming any apprehension towards new tech - especially mistrust around data privacy.





Our world continues to evolve. To help us respond, our Perspectives\* series explores how emerging technologies can help build more innovative public services.

Discover more in our latest volumes



**Immersive technologies**  
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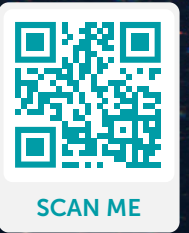
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In an era of unprecedented change, we are committed to helping our customers achieve their net zero targets.

Through our commitment to turning ideas into action, we help over 2.5 million professionals deliver the public services of the future, every day.





Innovation is in our DNA. We take great pride in putting together exceptional teams and a culture to help everyone be an innovator.

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