

HORIZON SCANNING ANNUAL UPDATE

Report by Michelle Patel

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1. Summary

- 1.1 Horizon scanning is the identification of emerging threats, risks and opportunities and subsequently enables proactive consideration, mitigation and exploitation of areas identified. The underlying principles and approaches can be used to look at a range of timeframes, from short-term incidents and surveillance response to long-term strategic challenges and opportunities. A horizon scanning capability helps ensure the FSA is a proactive rather than reactive organisation. We have been building our horizon scanning capability since the [Science Council recommended](#) that we do so in 2019, though it came into its own during the early months of the pandemic. The last [update to the FSA Board](#) was in August 2020.
- 1.2 This paper updates the Board on work since then and shares a snapshot of our assessment of the main challenges on the horizon for the food system (including businesses, local authorities, government and of course consumers) and the FSA, its regulator.
- 1.3 The programme of analysis is underway, and this paper introduces some first outputs. It also outlines how the work is already feeding materially into strategic discussions, not just by allowing better situational awareness, but also moving forward our policy responses on specific areas of work.
- 1.4 We have come a long way in a short time. Our approach is now being looked to by others in Government as they develop their horizon scanning functions.

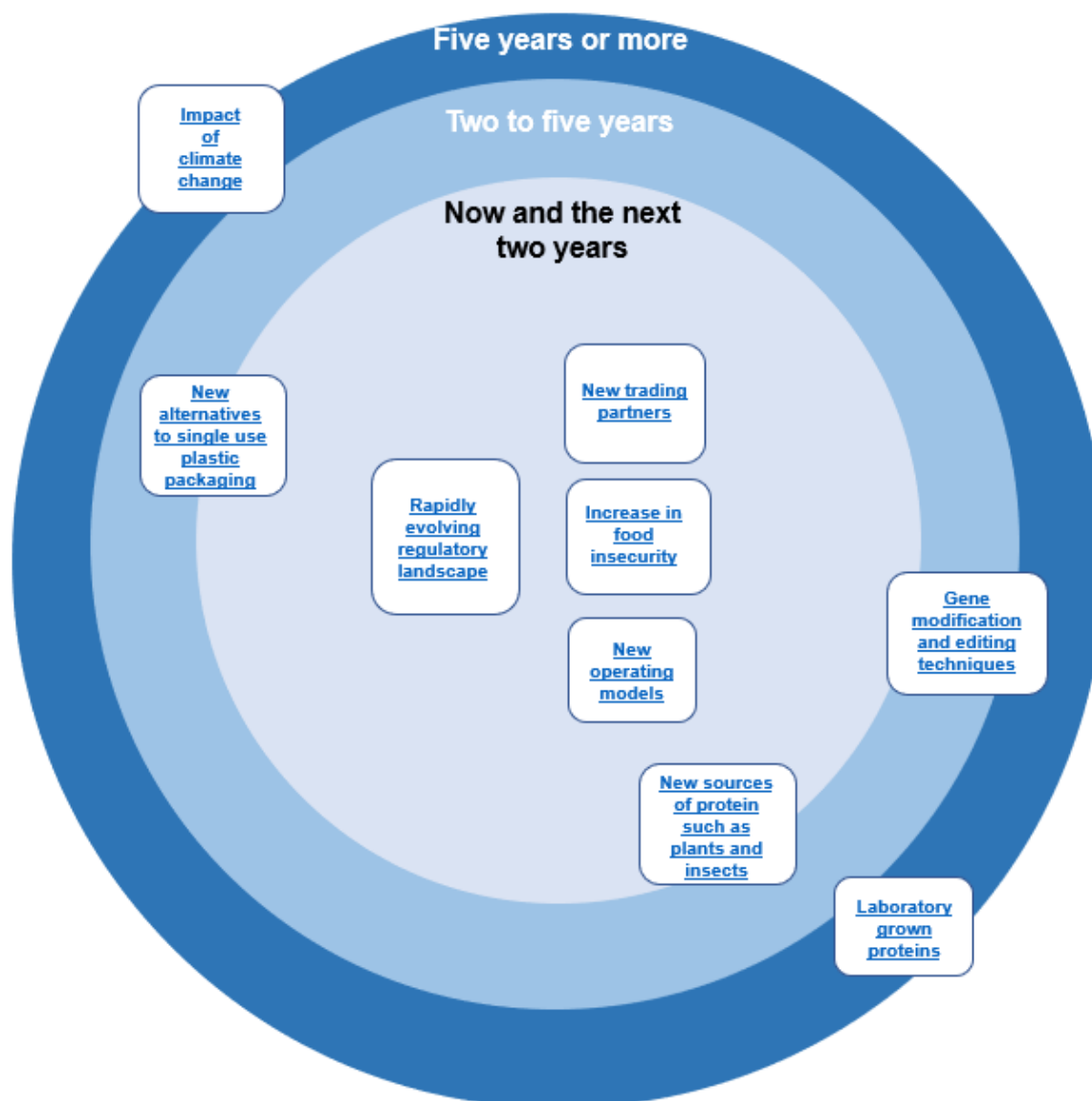
2. Introduction

- 2.1 As outlined last August, building on the success of our approach developed in response to the pandemic, the FSA has undertaken a programme of work to develop our foresight capability.
- 2.2 In addition, we have been building the process and flow of information through to assessment and implementation, as well as engaging across Government with horizon scanning networks to benchmark practice.

3. Evidence and Discussion

We are completing our first overview assessment of the most material shifts and challenges on the horizon for the FSA and the food system, looking at the short to medium-term (within the next five years) challenges across the food system.

4. Overview Assessment – May 2021



4.1 We have used various methods to analyse the challenges on the horizon.

- Internal PESTLE¹ analysis.
- Wardley mapping² of the operating environment and the drivers of change through a scenarios approach with FSA leadership.
- Structured dialogue with internal staff and (100+) external experts through an innovative digital elicitation approach, alongside an expert workshop. (see Annex A).
- Input from cross-Government networks including the Go-Science Horizon Scanning network and horizon scanning projects within Defra.

¹ An analysis that looks at macroeconomic factors – political, economic, social, technological, legal, and environmental change.

² A Wardley Map sets out the key services offered by an organisation within its system and environment, allowing us to see more easily where change might impact.

- 4.2 This assessment of the **short to medium term challenges** provide the FSA with insight into the potential changes across the food system that are likely to have a direct impact on the way that we work and the work that we do. Each of the identified areas of rapid change will be kept under ongoing review, as well as regular scanning for new areas.
- 4.3 This is an iterative process and the analysis will be reviewed regularly and kept up to date by a new team within Science, Evidence and Research Directorate. It is already informing leadership discussion on FSA strategic priorities, narrative and response, and will be fleshed out, validated, refined, and added to through continuous and iterative intelligence analysis from a range of internal, cross-governmental, and open sources.

5. Impact of Covid-19

- 5.1 We have updated our assessment of the impact of Covid-19 on the food system (see Annex B). The issues highlighted then are broadly unchanged. It outlines some big questions some of which we have already started to answer. Many of the trends which were present before (e.g. increased household food insecurity, increase in volume and variety of online shopping for food) have been accelerated by the pandemic.

6. Further insight

- 6.1 Where this work has highlighted evidence gaps, we are undertaking rapid 'deep dives' to quickly provide an evidence base to allow us to take action confidently.
- 6.2 Our first output from these is an analysis of emerging technologies for food production in conjunction with University of Cambridge which we have published today (see Annex C).
- 6.3 It indicates that in terms of potential impact, proximity, and risk/opportunity for food safety, we should focus foresight efforts on synthetic biology and novel food packaging and the risks and opportunities afforded by digital technology. We have been looking at the potential and risk of digital technology for food for some time (for example in our work on digital platforms and [Strategic Surveillance](#)) and are considered leaders in this space.
- 6.4 We have also been engaging with experts on both lab-based proteins (including for example lab-grown meat, precision fermentation and plant/fungal based novel production methods) and novel food packaging too for some time and will be developing a more detailed assessment of the regulatory and organisational implications of these.

7. Analysis and implementation

- 7.1 Our analysts are working with experts, Strategy Unit, and leadership to develop our options and planned actions to take. This includes a range of responses,

depending on the importance of the issue and how much it is within the FSA's remit and ability to influence it:

- a) Providing recommendations to EMT around new work for the FSA to undertake, reconfirm or expand the scope of existing work in the near term, for example to include with the ABC programme workplan.
- b) Informing the strategic issues/challenges that will form part of the FSA's future strategy, to be developed and presented to the Board later this year.
- c) Sharing our evidence and insight across government to inform policy and decision makers in other departments, for example we are giving ongoing support to Defra in their response to the National Food Strategy.
- d) Publishing our evidence and insight to inform wider debate. This provides the FSA with a route into other government departments where we have areas of mutual interest, such as food insecurity or labelling.

7.2 This work has already started to take effect. The first two challenges that have been taken through the entire process focused on the following:

- a) **Challenge 1:** The ability of **food regulation to adapt sufficiently quickly to changes in operating models**, and production and supply techniques to ensure food is safe without inhibiting positive developments in the food system.
- b) **Challenge 2:** The impact of **increased inequality** on people's ability to maintain a safe and healthy diet.

7.3 Although we are still at a relatively early stage of taking these challenges through the end to end process, we have already started to identify options and put in place responses to these challenges. This work has already resulted in the identification of a range of strategic issues as well as some early activity being tasked across the FSA, for example:

- a) Communications Directorate to develop an approach to countering misinformation around innovation or new models within the food system (challenge 1).
- b) Mapping work, drawing on work already done by various teams including DDaT (Digital, Data and Technology) and Economics mapping the risks and opportunities emerging from the new variety of models of buying and selling, both online and locally. This work will be taken forward by the ABC programme (challenge 1).
- c) Extending our Covid-19 consumer tracker to September this year, and secondary analysis of the household food insecurity data in Food and You 2 as well as increased FSA support to our ongoing work to support the Defra response to the National Food Strategy (challenge 2).
- d) Participative research to map and understand the various models of community food provision so that we might better support and ensure proportionate regulation and uphold the right to safe food for all consumers (challenge 2).

8. Conclusions

- 8.1 We have come a long way in a short time. While it is still early in its establishment, this approach is already allowing the FSA better situational awareness and a more strategic assessment of the key uncertainties and a better flow of intelligence from analysis through to sense-making and implementation of actions. The insights we are producing will be of use to ourselves and others.
- 8.2 The challenge now is to ensure that we have both the appetite and the resource within the FSA, having developed this insight and evidence, to do something about these 'so whats'. We need to continue to work on how we respond to these changing risks, to make sure we are truly guided by consumers' interests and to ensure that food remains safe and is what it says it is. Whilst this is a challenge common to by many departments, we are determined to be a responsive, future facing organisation.
- 8.3 The Board is asked to:
- **note** the overall strategic assessment and additional analysis, which will be updated on an iterative basis and which we hope to bring to the Board retreat in October.
 - **note** that this is necessary work which is proving its worth quickly. Its value is not just in general situational awareness but in the sensemaking, identification of actions and implementation across the FSA led by Strategy Unit. This is only possible with active engagement across the leadership of the FSA.
 - **confirm** your support and engagement in this activity now and in the future and
 - **discuss** any areas where you would like further information and analysis.

ANNEXES

- a. report from expert elicitation (annex)
- b. the latest assessment of the impact of Covid-19 (annex)
- c. the Cambridge report on emerging technology (annex)