

LIFTING OUR SIGHTS

Beyond 2030 - the impact of
future trends on the transition of
our Armed Forces Community
from military to civilian life

An Initial Perspective

FUTURE AGENDA

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In the Spring of 2020, Forces in Mind Trust (FiMT) commissioned Future Agenda to undertake a focused study looking at “Future trends and their impact on the Armed Forces Community in 2031 and beyond - with a focus on transition.” The aim is to engage a wide community of experts to understand the challenges and opportunities that lie ahead for Armed Forces veterans so that collectively we are more prepared for the future as it unfolds.¹ This project is being conducted in three phases, and includes stakeholder interviews, expert workshops, and ethnographic research. It will culminate in the publication of a final report in February 2021.

This paper is an initial perspective, summarising the first phase of the discussion. It begins with a summary of the macro societal shifts that are taking place. It goes on to look at some national shifts likely to take place over the next decade, considers some trends affecting the Armed Forces Community as a whole, then focuses on those that may impact the charity sector that has developed around it. It does not attempt to provide a full analysis of the trends. This will occur during the next two phases of the project.

All of the trends have been developed from 47 interviews undertaken with a range of informed, senior stakeholders and subject matter experts from across the Armed Forces Community and beyond, and have been complemented with existing Future Agenda research. Participants include academics, policy makers, senior members of the charity sector, and representatives from the business community. We thank them most sincerely for their support.

Please note that, as these discussions were undertaken under the Chatham House Rule, the quotations we have used are not attributed to individuals.² However, for greater understanding of the different perspectives, we have identified their expertise in endnotes.



We would very much welcome your contribution, feedback, and constructive critique to help improve these insights, prioritise those of most significance, and identify any gaps. Therefore, in addition to being made available for public comment, the ideas we have begun to outline will be used as stimulus in a series of expert workshops which will explore the potential implications and key questions that arise for stakeholders to consider over the next decade.

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84 Brook Street
London
W1K 5EH
www.futureagenda.org

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Context

Forces in Mind Trust works within the Armed Forces charities sector, and much more widely, to support the United Kingdom's Armed Forces Community. In March 2020, it commissioned Future Agenda to explore the socio-economic and socio-political trends most likely to impact this community over the next decade and beyond.

The aim of the research is to better understand future social, technical, economic, environmental, political, legal, and ethical trends, in order to ensure that transitioning Service personnel and their families have the best possible opportunity to make a successful and sustainable shift to civilian life.

It is clear that economic, social, and political shifts are causing the nature of military service and consequently the demographics of the Armed Forces Community to change. At the same time, the role that the Armed Forces play, their purpose and their presence in the national consciousness, is also changing. This impacts the way in which ex-Service personnel are perceived by the general public. Although it is well recognised that ex-Service personnel's experiences of their transition from military to civilian roles vary greatly, much is dependent on the individual's attitude to this transition, alongside the extent of support available to them as they re-enter civilian life. To be truly effective, those organisations which provide support must respond to a dynamic environment.





Macro Trends

In this section, we detail what we see as the five macro scale certainties for the next decade – the things that, unless there is an unexpected, massive, and fundamental global shift, will most definitely occur, and so are the trends upon which everything else is built. Each of these is covered separately to explain why these drivers of change are occurring, the core characteristics of these shifts, and therefore how they will influence society between today and 2030.



1 Shifting Power and Influence

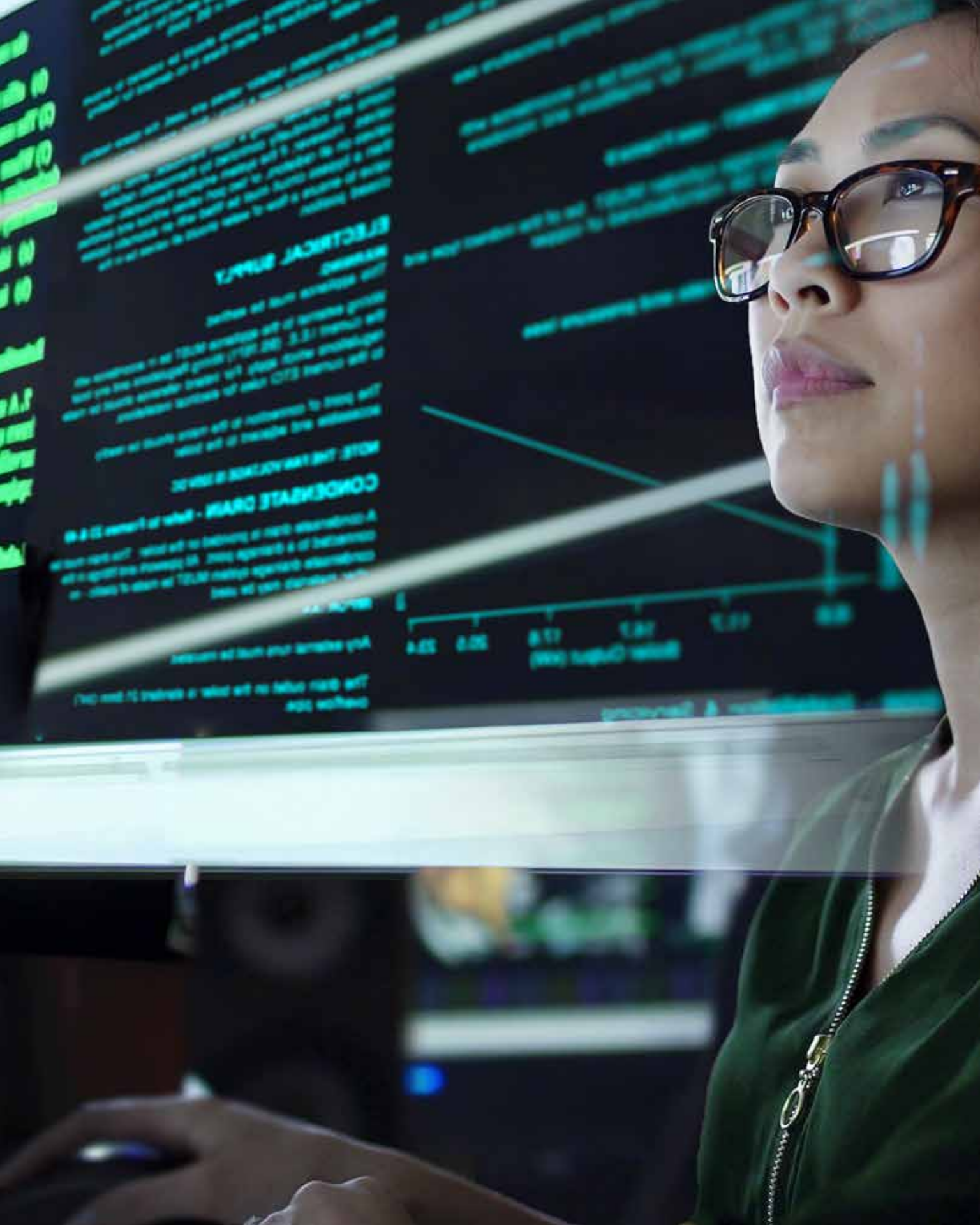
As the centre of global economic activity continues to move East, stronger Asian leadership and further US retrenchment stimulate a global power vacuum.

We are seeing fundamental changes in the global balance of power. Broadly speaking, we are witnessing an accelerating shift in global economic activity Eastwards, with stronger Asian leadership, especially from China, and simultaneously further US retrenchment stimulating a period of global uncertainty. Western markets are weakening, the US is becoming increasingly isolationist, and there is growing concern around China's ambitions for wider influence. Alongside this, there is a trend in many regions towards more centralised, authoritarian rule, which is evident in countries such as India, Brazil, and Turkey, and typified by China and Russia. This has coincided with the rise of right-wing nationalist-populist governments and parties in parts of Europe where, with mounting pressures on the EU, the different priorities of north and south are also becoming evident.

It seems to some that the traditional global structures such as the United Nations (UN), World Health Organisation (WHO), and World Trade Organisation (WTO), some of which were established 80 years ago, may no longer be capable of steering a middle path. Indeed, several believe we have reached the end of the era of globalisation, and looking ahead, we will experience greater fragmentation, instability, lasting and significant economic pressure, stronger competition, and a potential escalation in international conflicts. All this at a time when Britain's status and role in the world post-Brexit remains unclear.

Although currently enjoying a *"healthy, international respect for its professionalism, bravery, and quality,"* some believe that the UK Armed Forces' reputation as an instrument of international power will be difficult to maintain.³ There is *"a consistent demand to punch above our weight."*⁴ This is seen to be particularly difficult when *"the challenge that we will have in a 10-year timeframe is whether the UK is still going to be an influential player in the world."*⁵

An Implication: A lack of clarity on the purpose and role of the UK Armed Forces may result in reduced public and political support.



2 Data and Automation

As data reveals the previously unknowable, increasing automation transforms society, and the digitisation of services improves transparency for some.

At the same time as politics are pushing some of us apart, our dependency on technology and interconnected systems is pulling others together. Deeper and wider digitisation is providing previously unknown levels of information and insight, allowing us to, for example, decode human DNA in minutes, find cures for cancer, accurately predict human behaviour, foil terrorist attacks, pinpoint marketing efforts, and prevent diseases. But data flows are increasingly being blocked by governments which seek to protect their country's people, sovereignty, and economy, and over the next decade, many expect more countries of sufficient scale and capability to go beyond just defending their data assets and to try and build a data economy of their own.⁶

In the commercial world, the impact of increasing automation is transforming the workplace and increasing the transparency of service provision. Some expect that in the long term, this will lead to increased efficiencies of many interconnected systems and greater safety, alongside higher productivity and economic growth, and the creation of new jobs in yet-to-exist industries. However, in

the short term, with unemployment rising at record rates and the world economy shrinking, there is growing concern about the impact the preference for technology in place of workers may have on people, particularly for those who do not have adaptable skills. By 2030, as many as 20 million additional manufacturing jobs worldwide could be displaced.⁷ This at a time when the World Economic Forum has forecast that we need to create another 600m jobs to sustain current living standards.

An Implication: In an increasingly competitive civilian employment market, veterans with greater literacy, transferrable technical skills and relevant experience will be favoured.

THERE IS NO

PLANET

B



3 Climate and Ecological Crises

As the impact of global warming and ecological loss becomes evident, new triggers for conflict emerge. All activities are scrutinised for mitigation.

The Intergovernmental Panel on Climate Change (IPCC), the UN body responsible for collating scientific evidence on the issue, has concluded that climate change impacts have the potential to exacerbate factors linked to conflict in some regions of the world. It can also act as a ‘threat multiplier’ that can worsen existing problems, especially in countries and regions with failing governments or existing conflict.

Alongside and interconnected with climate change is the ecological crisis. Scientists now agree that we are currently living in and presiding over the Earth’s sixth mass extinction event, a period defined as a loss of 75% of species. This has been caused by humans - the others have all been caused by volcanoes and meteors.

One of the consequences of this is changing weather patterns. As floods, droughts, storms, and food shortages become more frequent, there is a growing recognition that this could increase existing threats to international peace and security. Alongside humanitarian crises, including mass migration, transport and trade routes are likely to be disrupted, affecting global supply chains. Climate change can affect infectious disease transmission, increasing the need for medical assistance, vaccinations, and personal protective equipment. Given this, the need for related military interventions is also expected to increase. Serving personnel

will have to operate in extreme ‘climate change-affected’ conditions more frequently. This may affect their physical and psychological well-being.

Some in our discussions were clearly concerned. *“The government doesn’t see the environment as urgent enough in the first half of the next decade, but it will do in the second half. It will have a profound effect on defence.”*⁸ Protecting trading routes was a particular concern. *“It will be key to protect imports, and maintaining physical lines of communication like shipping will become increasingly important. We will need to make sure that goods arriving from the Far East, where we are increasingly reliant, actually arrive. There will be a role for the military: to protect imports and maintain physical lines of communication.”*⁹

In addition to the physical effects of these twin crises, many expect a shift in funding and fundraising priorities, as both Governments and the public prioritise green issues over others. This, some fear, will reduce the amount of funds available to other sectors. *“Undoubtedly more money is going into the green sector, climate change, and climate action. It is very much driven by a younger generation, and we won’t be able to resist it, even if we wanted to.”*¹⁰

An Implication: A growing role for the military in assisting with the impacts of climate change, as well as the causes of biodiversity loss, boosts levels of public support.



4 Rising Inequalities

Increasing health, wealth, and education inequality has impact. More at the margins of society struggle. The gap between the haves and the have nots increases.

Globally, many nations are experiencing greater inequality. The rich are getting richer, the poor are getting poorer, and in some countries, those in the middle are being squeezed. With 2,000 billionaires having more wealth than the 4.6 billion people that make up over 60% of the world's population, there is a clear focus on wealth inequality.¹¹ However, in many regions, the gap between the have and the have nots is just as much about access to healthcare, education, and the increasingly pivotal digital connectivity. 70% of the world's population still don't have good healthcare, 1 in 3 people don't have access to clean water, and around 40% can't yet access the Internet. Moving ahead, there are many important targets for change. While many are integrated into the UN Sustainable Development Goal's, a major shift in inequality is not expected any time soon. *"As inequality rises in the future, the challenges in society will become more apparent."*¹²

In the UK, many eager for an end to austerity see paying for Covid19 delaying the end of the tunnel. *"Inequality is set to increase significantly for many."*¹³ Wealth inequality had been levelling off in the UK at the start of the century, but now, according to some data, it appears to be accelerating again. *"Health inequality, digital connectivity, and access to education are all growing gaps in many parts of the UK."*¹⁴ As UCL research in London has notably

highlighted, if you move along the Jubilee Line from Green Park to Canning Town, life expectancy drops 1 year per stop.¹⁵

Often within local neighbourhoods, both in cities and in smaller towns, the rate of widening of these gaps is accelerating. *"More people at the margins of society are struggling. There is a group in society who are divorced from the mainstream, excluded from credit or internet access, and who fall through the net and become dependent on the state."*¹⁶ Some highlight that *"the challenge is how to fill the gap. Do people's needs go unmet, or do we grow charity?"*¹⁷ Considering the division between the state and charity, several consider that *"the boundary has slipped considerably further away from the state towards charity, through austerity."*¹⁸

An Implication: The expectation gap for less technically qualified Service leavers widens. As obstacles to social mobility become more entrenched by pervasive inequalities, service leavers' opportunities to succeed diminish.



5 Changing Characteristics of Conflict

In a world of cyber-attacks, biowarfare, and misinformation, traditional military forces are increasingly complemented by less visible assets and capability.

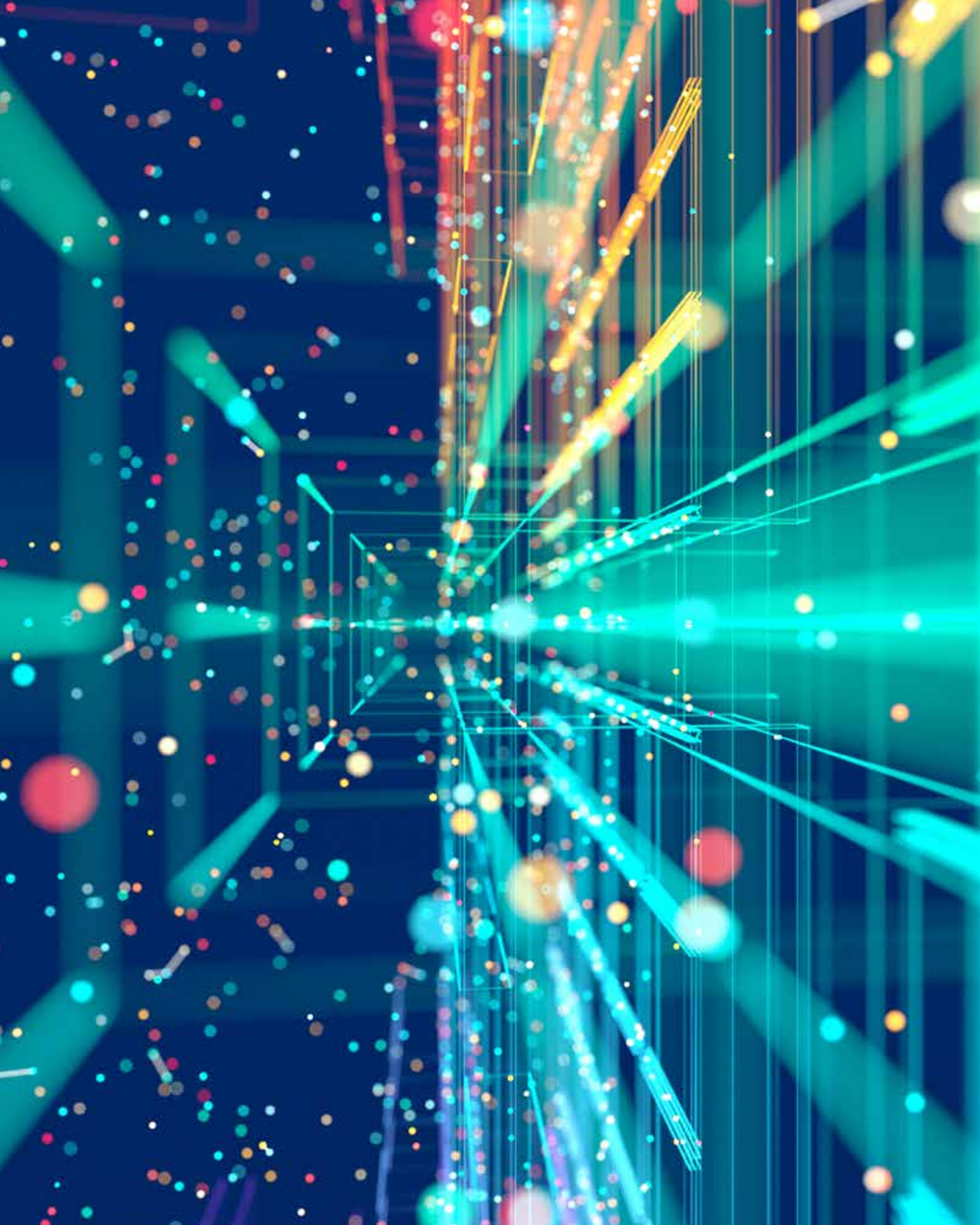
From a defence perspective, disruptive capabilities are advancing exponentially. In a world of cyber-attacks, biowarfare, and misinformation, traditional military assets are increasingly complemented by less visible technological capability. Globalisation and ever more digital connectivity have made all nations more vulnerable to attack, and a proliferation of new technologies, including cyber, electronic, and drone warfare are now available to more rogue states and actors. Some nations, Russia, the US and China, for example, are developing offensive weapons in space. This is a major cause for concern for international communications, critical intelligence, surveillance, and navigation, not to mention national infrastructures, from mobile phones and cashpoint machines, to manipulating stock markets. *“Going forward, we will be trying to create peace in the digital world, rather than the physical world. This is definitely a military challenge. The majority of capability is now online, and you need to protect the nation.”*¹⁹ Understanding the likely direction of this new theatre of warfare has raised fundamental questions, not only around the type of equipment necessary for the armed forces, but also around the kind of people and the skills required to serve.

Despite faster technological innovation, new frontiers and forms of combat, old problems remain. Many we interviewed spoke of the need to maintain a traditional force, and to ensure that there is a deployable capability to support allies across

the world. *“If your human tactics, structures, and support don’t exploit the technology, then actually you are just wasting your money - or only exploiting 10-20% of the effect that you could have with support structures around it.”*²⁰

Key in all of this is the fact that distance is becoming increasingly irrelevant as a security buffer. As a result, some argue that the UK should shift focus from conventional equipment such as aircraft carriers or tanks, and invest instead in artificial intelligence, quantum computing, and robotics. Future defence spending plans may support this. It would allow future conflicts to be fought by robots or autonomous systems. Others disagree, *“I think the tension is that you will always need hard power. In Afghanistan, we had extremely high tech, but we still needed boots on the ground. The question is around the size and the structure”*.²¹ Most agree that, in the main, warfare will become increasingly precise and although this might mean fewer physical casualties, the consequences of these new forms of forms of engagement, which will include long term surveillance operations of individuals and their families, may well lead to more mental and psychological stress for Armed Forces personnel. *“The next major damage that we see will be extraordinary mental trauma coming from operating drones. It’s not PTSD - this is doing something that we’ve never done before, which is to track and kill”*.²²

An Implication: There is a growing requirement to explain the work of some of the UK Armed Forces, and a shift in the need for support for some of those who have served.



Catalysts and Accelerators

Although most aspects of society are affected by these macro shifts, it is equally true to observe that their impact is often unequal or disproportionate, depending on other external factors that overlay them more or less regionally. These factors do not raise new trends in themselves, but rather accelerate, or decelerate, the impact of the macro shifts. Today, two issues are seen in this context: The lasting impact of Covid19 and wider misinformation.



6 Covid19

The pandemic accelerates adoption of health technologies and seeds lasting change on issues such as privacy and trust, and the nature of how we work.

The world was aware of the possibility of global pandemics and their impact. What was uncertain was how governments would act, and particularly cooperate, to prevent an epidemic from becoming a pandemic. The UN, WHO, Centers for Disease Control and Prevention (CDC), Bill and Melinda Gates Foundation, and many government medical experts have been warning about a viral pandemic, and many have been running detailed simulations and scenarios. While several governments, notably many in SE Asia, have learned from previous cases and introduced policy and approaches to mitigate impact, elsewhere things have not gone as well. In 2019, the US and the UK were considered by John Hopkins University to be the most prepared for a future pandemic – but not fully ready.²³ The reality currently being played out shows a different picture. Although the US is now being impacted by an early second wave, a recent report by the OECD suggest that it is the UK economy that will be likely to suffer the worst damage from the Covid19 crisis of any country in the developed world.²⁴

China's challenge to US hegemony was already strengthening on many fronts before the Covid19 crisis erupted. The pandemic may accelerate this shift. For US-allied democracies that value open governance, civil rights, and free speech, this is a worrying prospect. Covid19 has affected all aspects of UK society, but the accompanying economic shock is likely to hurt the vulnerable and socially insecure most. Unprecedented government aid

packages for businesses and workers, intended to mitigate the disease's economic and financial impact, have led some analysts to suggest "the State is back" – and that the limits of the post-war neoliberal, free market model have finally been reached.

In the UK, the Armed Forces have kept a relatively low profile through the crisis, deploying troops in supporting roles and largely operating away from the public eye. This lack of public visibility was not universally applauded by those we interviewed. Although there was no expectation that soldiers could be deployed to protect public order, there was often a sense of frustration that *"perhaps the government, in hindsight, will be criticised for not using the Armed Forces - a 'useful asset' - enough."*²⁵ Some also felt that the widespread description of front-line workers as heroes might have the unintended consequence of a decline in public sympathy for the Armed Forces. *"That word (sic 'heroes') has now been borrowed. Or is it permanently lent? The word becomes more muddled and so the likes of Help for Heroes have a harder time raising attention".*²⁶

While society deals with the challenge of controlling the pandemic for the next year or so, or longer, until vaccines have been proven and made widely available, there are several lasting changes that are being recognised. For example:

- There is renewed public confidence in people and organisations who really know what they are talking about. Accredited, independent, expert bodies that clearly explain complex issues and coordinate connected responses are prized.
- Global supply chains evolve to be more flexible shared regional supply webs. Manufacturing shifts from centralised production to a smaller and distributed approach. Competitors access shared, not proprietary, networks and systems.
- Health and personal identity data are integrated, as platforms emerge that allow or require us to be validated in order to access key locations and services. Proof of immunity and proof of identity are digitally unified for all.
- Recognition of the benefits of real-time surveillance and individual behaviour monitoring during a crisis supports widespread acquiescence to perpetual, national, digital surveillance infrastructures.
- A shift in how and where we work, with less time in the office, less time commuting, and more time working from home.

- A reduction in international travel, most notably from business travellers, but also potentially from consumers re-appraising their own lifestyle with respect to the climate change and biodiversity crises.

While these will impact variously, many see that without greater cooperation between nations, as occurred a decade ago with the G20 response to the Western financial crisis, the possible mitigation of future pandemics will be a growing threat.

An Implication: Increased awareness of the risks taken by front-line workers reduce the “hero status” of Armed Forces veterans.



- : Name
- : Occupation
- : Address

Information

Male
Age 25

Information

Male
Age 30



7 Misinformation

The hijacking of truth by a more diverse, unregulated community undermines who we trust. Even sophisticated users struggle to determine fact from fiction.

We have already mentioned the significant role and value which society now places on data. Alongside this digitisation is a fundamental change in how people interact with each other. With an increasing number of activities taking place in cyberspace, information will become ever more central to humanity and conflict. We live in a world of an increasingly expanding and unregulated information space, where it is difficult for even sophisticated users to determine what is fact and what is fiction. The threat of cyber-attacks and the spread of misinformation are becoming increasingly commonplace. What's more, some significant social media platforms have helped to polarise opinion, create uncertainty, and in some instances, erode trust in institutions. Some respected middle ground commentators such as the Economist see that *"Digital disinformation is destroying society, but we can fight back."*²⁷

Algorithms designed to amplify information, communicate social views, and generate trends and social chatbots coded to post the latest news stories have, to varied extents, become vulnerable to manipulation. Although most frequently attributed to Russia, others such as North Korea and China, and numerous independent bad actors, are often cited as being in the mix. Most attacks to date have, however, been fairly simple, driven by humans

or bots. *"Sub-threshold hybrid misinformation is cheap to do, with little regulation, and is extremely hard to defend against."*²⁸ Going forward as Artificial Intelligence, machine learning and deep learning are variously applied, expect that the use of these "deep fakes" to become more widespread. Credible fake video and audio will be used alongside text and images to deceive many – business, the public, and government agencies alike. As a consequence, *"autocracies will do well, because they control all the information, but democracies are more open and therefore more vulnerable to the misinformation."*²⁹ A good number will struggle to determine fact from fiction.

An Implication: The ability to be comfortable with ambiguity, and to operate in fluid situations with incomplete and uncertain information makes Service leavers increasingly attractive to potential employers



National Trends

We heard three specific areas which, from a national perspective may influence how UK society behaves and will be perceived over the next ten years. In particular the decline of Brand UK may impact our global status; the blurring nature of work may present challenges for some as they battle to adapt to a fast-changing professional environment and the speed at which communities change may raise more challenges for some to establish relationships and build a stable home environment.

**BE KIND.
LET'S
LOOK OUT
FOR ONE
ANOTHER.**

COMMUNITY IS KINDNESS.



8 Decline in Brand UK

Brexit, Covid19, the rise of regional leaders, and momentum behind devolution accelerate the decrease in support for brand UK and a sense of national identity.

The general view in many of our interviews was that, as a nation, the UK is facing a fundamental challenge to its national consciousness, and a reinterpretation of what it means to be British. This raises concerns about how the UK will be perceived on the international stage. *"The UK currently faces quite a stark change in how it interacts with the world,"*³⁰ with the Armed Forces *"intrinsically tied up in how the country sees itself."*³¹ Even without the added pressures from Brexit and the seismic impact of the pandemic, balancing the needs of the four nations has always been challenging. Thirty years on from Cool Britannia, and a decade after *"the unifying effect of the 2012 London Olympics,"*³² the 2020s may see brand UK experience a major period of flux. Although *"the role that the Armed Forces play can still be unifying - even in the context of change,"*³³ those organisations that are closely coupled to a strong UK identity may well experience a corresponding change in public support.

Regional leaders are increasingly seen by many locally as those best able to manage the future. *"Nationalists want more control and devolution; more fiscal responsibility."*³⁴ Calls for another independence vote for Scotland may grow and, with the socio-political shifts underway, a border referendum on the reunification of Ireland is also considered a possibility in some quarters. This risks a potential fragmentation of the UK, which in turn could lead to rising *"political uncertainty that will create challenges for the economy,"*³⁵ the government, and the nation as a whole. Add in the probable succession of the Queen by a less *"universally popular"*³⁶ heir, and there may well even be *"shifts in the role of the state over the next few years."*³⁷



At the same time, we heard that there is an increasing tendency for people to define themselves by their faith, gender, sexuality, or race, which for some is potentially undermining the sense of national cohesion in Britain. There is *“an unprecedented change in the opinions of young people in a number of areas: they’ve moved to become more liberal, democratic, and leftwards across numerous issues.”*³⁸ Not everyone agreed; some consider that *“the neo-liberal populist ideology has reached its peak and is passing.”*³⁹ However, whatever the perspective, there was general consensus that alongside a wider decline in trust of central governments that has been underway for some time, there is an accelerating decline in confidence in the UK identity that will have a growing impact over the decade. *“Unless we have a proper, legitimate national conversation about what sort of society we want and need, and what we want to build out of this, we will slip back into business as usual and will be overwhelmed by the climate emergency and an atavistic state.”*⁴⁰

Alongside these socio-political shifts, more practical challenges are emerging, as policy makers struggle to adapt to the practicalities of devolution. *“People don’t understand that we have devolved services,”*⁴¹ and preparation for *“people coming out of a unionised UK space into a national space”*⁴² needs to improve. For example, *“Scotland has fewer larger employers compared to the UK as a whole. There is, however, a vast number of extremely small businesses, so the individual who is coming back into the Scottish economy is probably entering a market that is not the same as that which is*

*perceived by the MOD.”*⁴³ Similar views were echoed in interviews with experts in Wales and Northern Ireland, and in particular with respect to local state service provision. As devolution deepens and hardens, service provision, for example social services and housing, will vary markedly from country to country and council to council.

An Implication: Transition support shifts from a UK focus to be more individual country and region specific.





9 Blurring of Work

Progressively part-time, multi-job workforces, and flexible, automated workplaces become common, but are increasingly difficult for some to adapt to.

It's not only the Armed Forces that are experiencing change. The workforce and workplace are also in transition. *"We are going to have an uncertain decade."*⁴⁴ With more gig-working and freelance contractors, as well as a surge in home-working, the possibility of a 9 to 5 job with a single employer is rapidly disappearing for a good proportion of the population. For those used to structured roles within long-term employers, having to adapt to an unstructured work environment may well be tricky. *"People coming out of the military have been surrounded by enormous certainty from an unambiguous environment with clear relationships, operations, and emotional support. A lot of that certainty can disappear when they leave."*⁴⁵ Having to adapt to different ways of working *"may be more difficult for the military"*, and *"the lack of hierarchy, fluidity, and cultural EQ required in organisations is what they may find most difficult to navigate."*⁴⁶

Not everyone agreed with this view. *"It is dangerous to assume that the military won't change - it might well become more fluid, agile, and arguably more porous as well."*⁴⁷ In recognition of the need to update its working practices, adaptations have already been put in place to make provision for greater flexibility. For example, *"the Armed Forces (Flexible Working) Act already allows members of the Armed Forces to serve part time, or to restrict the amount of time they spend away from their normal place of work."*⁴⁸ There has also been

experimentation with a reduction in hierarchy and *"a flattening of structures."*⁴⁹ Several even envisage that over the next decade there will be a *"wholesale modernisation of the career structure - the gig economy, how we embrace the skills we need and when we need them."*⁵⁰ Looking ahead, although working practices in the Armed Forces are unlikely to be as fully fluid as those of civilian workers, and the added flexibility could challenge traditional military conventions, it may well make it easier for those wishing to transition to step into the civilian economy.

An Implication: A re-presentation of military service as a first career, with multiple skills acquisitions, assists those in transition to find and succeed in new roles.



10 Changing Communities

With more ageing, migration, and mass unemployment all impacting, the speed of change in local society accelerates: Some adapt but others are marginalised.

Perhaps faster than at any other point over the past 50 years, many UK communities are changing in multiple ways all at the same time – in their demographics, economy, and structure. As such, *“people are facing a dramatic shift in their standard of living.”*⁵¹

Changes such as ageing populations, as well as more internal migration, are set to further strain social cohesion, with increased unemployment expected as the economic consequences of Covid19 are played out. Several see that *“the speed of change in local society over the decade may well be greater than previously.”*⁵² A number highlight that *“housing will be a particularly significant problem.”*⁵³

This is causing concern, as communities adapt to the new normal. In particular, those areas which suffer significant deprivation may feel disenfranchised, and become vulnerable to extremist organisations. Furthermore, from an Armed Forces perspective, some are concerned about the potential for some veterans to be influenced by and join, far-right organisations. Indeed, we heard that *“the mobilisation of the extreme right wing is seen as the biggest threat to UK security.”*⁵⁴ Significant effort may be needed to protect vulnerable individuals from becoming engaged in extreme right-wing activity – particularly,

perhaps, those with a military background. *“You have people coming out of the Forces who are battle trained with capability and skills that could cause bigger harm.”*⁵⁵

The picture is not entirely bleak. We also heard that over the next decade we might see that communities adopt *“a more engaged humane approach. There will be empathy to be able to do more wherever there is a crisis taking place, as a consequence of Covid19.”*⁵⁶ Certainly, while these trends vary from one neighbourhood to another, it is evident that, for those returning home after a period away, there will be a very different feel to when they left, which may make fitting back in less straightforward than expected. Increased competition for jobs will not help, and those who are less able to communicate the benefits and skills gained from an Armed Forces career may suffer. *“There is a risk that the Armed Forces may continue a trend of being a minority class within society, that operates in increasingly different ways from the mainstream. As they become proportionally smaller, there is always the risk that they could become a ‘caste apart’ - they could get out of step.”*⁵⁷ For transitioning personnel, identifying ways to address this challenge should be made a priority.

An Implication: Helping those in transition to actively participate in the wider community reduces real or perceived barriers after a period in the military.



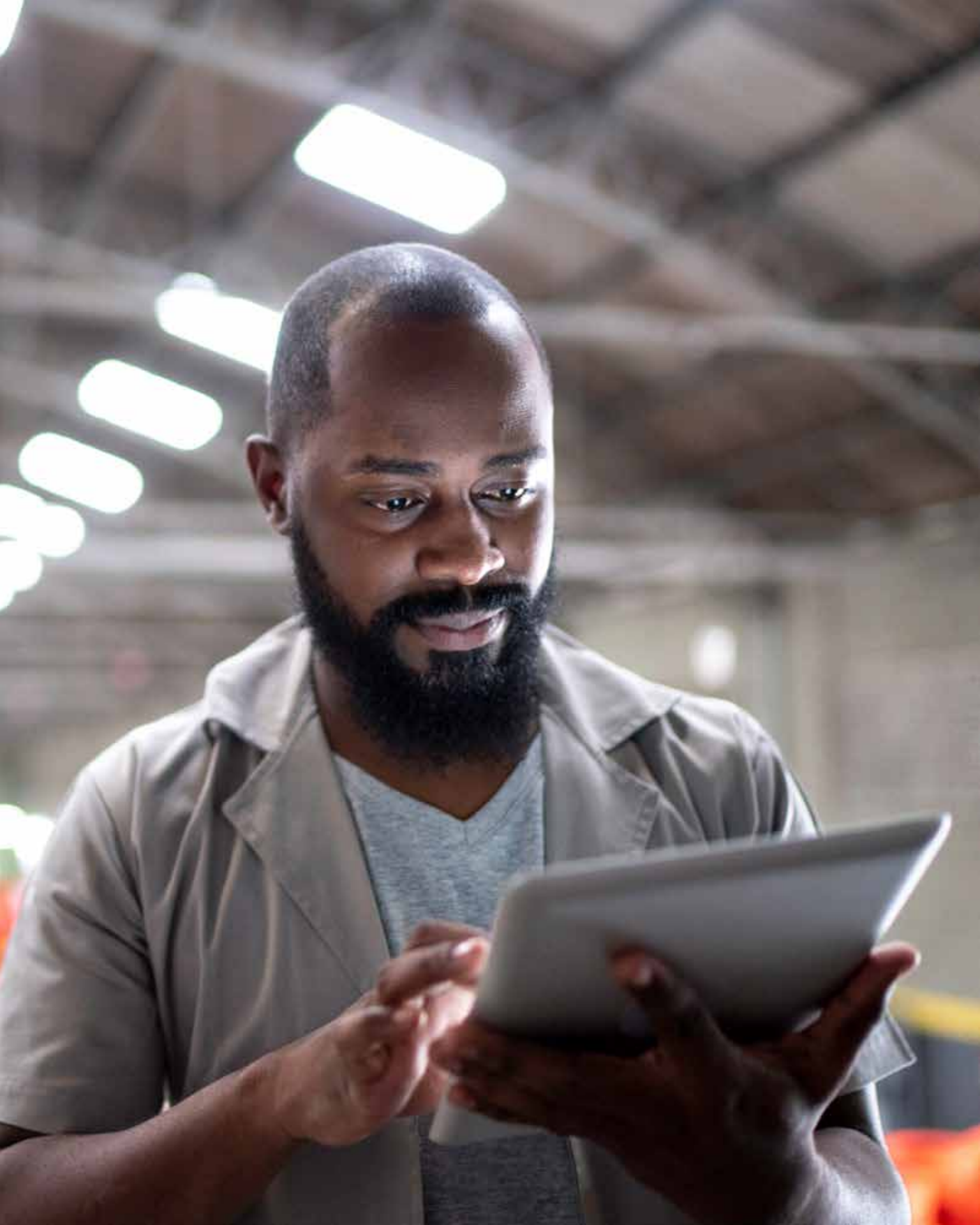
The Armed Forces Community

As the need for national security has evolved, so too has the structure of the Armed Forces, and although the number of Service men and women is declining, it remains a significant and important demographic.

Research shows that in 2014 there were between 6.1 million and 6.2 million members of the ex-Service community living in the UK. Of these, around 2.8 million were estimated to be ex-Service personnel, with around 2.1 million dependent adults (including spouses, partners and widows) and 1.0 million dependent children.⁵⁸

The obligation to ensure that those in the Armed Forces Community are treated with respect, is laid out in the Armed Forces Covenant. This is a promise by the nation to ensure that those who serve or who have served in the Armed Forces, and their families, are treated fairly. It pledges “that together, we acknowledge and understand that those who serve or who have served in the Armed Forces, and their families, should be treated with fairness and respect in the communities, economy, and society that they serve with their lives.” In addition, in 2019, the UK government announced the creation of an Office for Veterans’ Affairs, with responsibility for ensuring the principles of the Covenant are formally addressed. It has already outlined its response and actions on the back of a consultation on the 2018 Strategy for Veterans, with commitments around housing, pensions, and employment.⁵⁹

The Covenant has guaranteed that the Armed Forces Community is served by central and local government and the NHS, each of which have appointed officers working to create specific policies and services. However, their ability to meet their obligations cannot be separated from wider socio-political and economic contexts. In recent years, for example, almost all public services in the UK have been hit by policies of austerity. Significant reductions in health and social care budgets, especially at local authority level, have meant cuts to front-line services and a reduction in the capacity of public services across the board. The third sector has been encouraged to take up the slack, though often with little regard to the fact that their incomes and capacities are themselves dependent on the financial health of both local governments and the prosperity and wellbeing of their supporters. Some working for Armed Forces charities were concerned that the combination of austerity and the pandemic will raise questions regarding the need for specialist services for the Armed Forces Community, *“Covid19 has already caused military charities that provide respite care to close. In the short-term no one will suffer. But let’s say Armed Forces charities cannot afford to maintain them - should the Government step in? Is it an essential or a nice to have?”*⁶⁰ As we begin to understand the full impacts of the Covid19 crisis, it is possible that we will find wider support for the Armed Forces Community reduces.



11 Changing Perceptions

As public understanding of the role of the Armed Forces declines, so does the support to recognise veterans' capabilities, actions, and contribution to society.

Many consider that in the future, what the Armed Forces do will be less visible to the public than it is today. An expected rise in the number of highly technical, covert operations may mean that the public become less conscious of the military. *"Future military action will increasingly take advantage of remote tactics, and where possible, fewer major international deployments."*⁶¹ Some view this lower profile as an advantage; *"we don't want to be in the public eye a lot. We still have a hangover from Northern Ireland - it left a bad taste."*⁶² Others disagree; *"Everything in Afghanistan and Iraq said that to stabilise places, you must have boots on the ground, not just 'Eyes in the Sky'. Yet we decided on the back of those conflicts that we need more technology."*⁶³ Whatever your perspective, there may be consequences. For example, *"it may become a challenge for the Armed Forces in particular, with respect to budgets, because we need to show that the Forces are worth the spend."*⁶⁴

As one expert saw it, *"the biggest threat to the Armed Forces is a complete loss of public understanding about the role the military plays."*⁶⁵ Although some we talked to believe that maybe *"that's a positive - it means that they don't have to worry about the military, because we live in a fairly safe place,"*⁶⁶ this will have consequences for the public understanding of veterans and their ongoing role in society. Others point out, *"with few publicly known transition success stories, many veterans are falsely perceived as mad, bad, and sad."*⁶⁷ Looking ahead, most agree that there is a need to bust that particular myth, and instead, to build greater awareness of what service in the Armed Forces actually entails. The hope is that this will lead to a deeper understanding of the skills and abilities it is possible to acquire, and how they can then be applied in any number of capacities on re-entry into civilian life.

One of the reasons for this decline in understanding is generational. *"Older people, or those who live in an area with many Service personnel, see veterans as the WW2 'Great Generation'; people who made a sacrifice - people to look up to and respect."*⁶⁸ But, as time goes by, and the personal connections diminish, it has become harder for subsequent generations to translate that view onto the image of Service personnel. Rather than direct contact with anyone in the Forces, they are influenced by the media, and in particular *"by the most recent significant campaigns: Iraq and Afghanistan - Blair's Wars, which continue to cast a shadow."*⁶⁹ Alongside this, time has also caused the loss of institutional memory. *"The politicians of the 1960s and 70s all served - some from WW2, some with distinction. A sense of duty, service, and understanding was ingrained in them. This was lost in the managerialism of the nineties. So we now have Secretaries of State for Defence with tenuous links to the military."*⁷⁰

Generalisations haven't helped. *"It's easy to get too narrowly focused on the traditional veteran, rather than the whole community."*⁷¹ Like many large corporates, the Armed Forces is made up of a wide range of individuals from multiple walks of life, offering myriad skills. Some spend the majority of their professional life in uniform, others leave to establish a second, or even third career in a different capacity in civilian life. However, *"continued classification of veterans as one size fits all does not highlight the specific skills of each individual, and is not welcome. It doesn't offset public perceived myths of the ex-Services community."*⁷² The reality is that most who serve leave to go on to lead successful civilian lives, but *"that is different to the perception. Only 2-3% do have difficulty - the rest get tainted by that."*⁷³

Many we spoke to felt that *“this disconnection is a potential threat to the future of transition more broadly,”* and suggested the need for greater, and more thoughtful, engagement with young people, in order that they can better understand geopolitics and the purpose of soft and hard power.⁷⁴ *“We should be engaging with the education system to prepare our children in a more meaningful way about our country, and why it is important to have a coherent foreign policy. This is going to be more important as we leave the EU.”*⁷⁵ Others are, however, cautious: *“As a mother of a 6-year-old son, I’m not sure. The blue light services are part of British society, and they help run it and we see them on the streets. The purpose of the military is different.”*⁷⁶

For many, *“how a veteran is perceived is a language issue.”*⁷⁷ Some pointed to the way that charities have, unintentionally, skewed public opinion by focusing on those who are in need of help; *“they sometimes use highly emotive case studies.”*⁷⁸ Research has supported this:⁷⁹ *“The majority of the public believe that veterans will be damaged in body or mind by their Service.”*⁸⁰ This can be particularly damaging for the younger personnel in the community – not least because they don’t see themselves as veterans.

We also heard disappointment that the Armed Forces Community has not been recognised for its successful support of the police and the NHS during the pandemic. *“There are great stories about great work and how the military has supported the NHS throughout the pandemic, but it is not always recognised by the public.”*⁸¹

All this has had a knock-on effect on the perception of veterans by the corporate world. *“You find today that businesses are almost invited to employ Servicemen as some sort of national duty. It is not, or at least shouldn’t be, national duty. The reason that they ought to employ Service men and women is because they are very good.”*⁸²

An Implication: Co-ordinated messaging and use of language help to improve recruitment, both to and from the military in order to address the risk that veterans’ skills and experience are under-estimated by employers.



**NATIONAL
HERO
SERVICE**

A hand-painted sign on a wooden fence. The sign is white with the words 'NATIONAL', 'HERO', and 'SERVICE' written in large, bold, black, hand-painted capital letters. A small, colorful rainbow is painted above the 'A' in 'NATIONAL' and another small, colorful rainbow is painted above the 'E' in 'SERVICE'. The sign is mounted on a wooden fence with horizontal rails. The background shows a grassy field, trees, and a white fence in the distance.



12 Supporting Civilian Authorities

In times of need, Armed Forces support for the emergency services increases, and the boundaries of what this entails are tested.

Although there were clear levels of discomfort with the idea of the Armed Forces patrolling the streets at times of national crisis, many we spoke to felt it is likely that they will play an increasingly public role in support of civilian services such as the police, the medical services, lifeguards or fire brigade over the next decade. After all, *“it’s not just about going to war,”* they have a lot of useful capability. The Forces are good at mounting big logistical operations at short notice; they are trained to provide transport and engineering support and their medics can operate with poor infrastructure and strained resources. Most recently, this was demonstrated by the 2020 construction of the NHS Nightingale Hospitals, the involvement in the rescue work at Whalley Bridge during the 2019 flood, and their handling of the 2012 Olympics.

Unlike some other democracies, the deployment of the Armed Services in this context has strict legal boundaries which are already covered by the Civil Contingencies Act. This provides the government with powers to create emergency regulations at times of national crisis and threats to safety (including wartime), emergencies that threaten “serious damage to human welfare”, or to the environment or the security of the UK. This means that, in addition to the logistical support, the government can call on them to back up the police if there is widespread disturbance.

That said, almost everyone we spoke to felt that military involvement in domestic matters should be kept to a minimum, even at times of national crisis. *“The Forces are not for law and order, but can relieve the police of back room tasks, so they can do front of*

*house.”*⁸³ For example, the view was that, *“in terms of Brexit planning for food riots, the Army would be involved in guarding public buildings at the back, so the police could be in front and engage with the public.”*⁸⁴ There was also an acknowledgement that over the next decade it is likely the number of crises may increase as the UK deals with the consequences of Covid19, Brexit and other escalating issues.

However, the Forces will have to tread carefully when managing domestic issues. *“The conflict we’ve already seen between crowds and police - I think we are in for a sticky future.”*⁸⁵ And *“we are short of 20,000 police officers, so we will not be able to cope with nationwide marches.”*⁸⁶ We heard concern that any increase in military deployment may not only challenge the constraints of the Civil Contingencies Act, but it may also shape public perception about the role of the Forces in general. *“What people really understand the function of the military to be has already changed; it has been undermined by a lot of political bashing.”*⁸⁷

Looking ahead, as budgets are expected to be tightened, the Forces may face a *“perfect storm of increased requirement and reduced means”* and find it challenging to fulfil their primary role to defend the nation from attack at the same time as supporting the police and emergency services at home. *Too much involvement in domestic affairs may mean that “if the military’s role becomes less about foreign wars and more about support of the home nationyou will just lose public support and engagement.”*⁸⁸

An Implication: An increasingly blurred understanding of the boundaries of accountability challenges the public understanding of the role of the Armed Forces in domestic situations and shapes their opinion of veterans.



13 Regions of Connection

With MOD spending and bases focused in select areas of the UK, other regions have less understanding of, connection to, and empathy with the Armed Forces.

Although maintaining a unified national military, understanding of and connection with the Armed Forces across all the regions in the UK vary. *“Different regions of the UK are more predisposed to the military than others.”*⁸⁹ In England, the South West and South East, and across Scotland, there are strong cultural and economic ties; elsewhere, this is less so. In some areas, where job opportunities are limited, signing up to the Armed Forces is considered a gateway to new and better opportunities. *“The North East of England generates squaddies as a form of escape ... consequently, if they go back, their communities are less receptive and less absorbing.”*⁹⁰

Some areas have long provided a home for the Armed Forces. Consider bases in the South East (e.g. Aldershot, Brize Norton, Portsmouth & Gosport), South West (Devonport, Culdrose), Scotland (Faslane, Lossiemouth, Rosyth), and Lincolnshire (Cranwell, Waddington, etc.). Although their future size might be reduced, it is likely that their relationship with the Army, Royal Navy, or RAF will continue bringing with it the increased economic benefits of a MOD presence; *“The RAF and Navy are probably better at this than the Army.”*⁹¹ Maintaining this connection is one reason why many transitioning personnel choose to remain in the area: *“In the South West, there is a close connection with the Navy – it is visible, the dockyards are major employers, and sailors are welcomed into the maritime communities.”*⁹²

Looking ahead, and with the likelihood of fewer uniformed personnel visible to the public, lower defence-driven economic activity, fewer bases across the UK, and without an effective public engagement process, general awareness of the Armed Forces may well decline. *“No one teaches our children why we have a military mechanism, the role, or how we create security. Because they don't see it, they don't understand it. So, the connection returns to sympathy but, not empathy. People don't see the benefit that can be brought back to the community, and perhaps into the workplace.”*⁹³ Inevitably, this lack of understanding will impact the future prospects of transitioning personnel.

An Implication: Locality, a sense of place and community provide connection in an increasingly disconnected world. But areas with less military awareness fail to support veterans.



14 Smarter Talent

The increasing use of technology, especially within the Royal Navy and RAF, makes the Armed Forces a leading source of recruits for the future smarter talent pool.

Modern warfare requires more highly qualified recruits; it offers them leading edge training, and thereby produces smarter talent which is also highly regarded in civilian life. A more technological Armed Forces is already a leading source for the smarter future talent pool. We heard that *“the Armed Forces, particularly the Navy and the RAF, are very technology literate. They are dealing with technology first and foremost.”*⁹⁴ Indeed, in several fields such as cyber security and surveillance, the expert opinion is that *“military capability is a long way ahead of the commercial world.”*⁹⁵

Not all sectors of the Armed Forces will benefit from increased training, however. *“The Army is less exposed to cutting edge technology in their careers”.*⁹⁶ The type of skills necessary to patrol the streets in, for example, Helmand Province, do not require significant technical knowledge, and because of this, the capability of military recruits is sometimes lower: *“The average reading age in my regiment was age 11. We had a concerted effort to get that up to age 14, so that everyone could use the tech that they were given.”*⁹⁷ This type of skills deficit may be reflected in the higher unemployment rates of private soldiers compared to other veterans: 8% of Army veterans are unemployed 6 months after leaving, compared to 4% for Navy and RAF veterans.⁹⁸ However, some see a change ahead. *“Inside the Army, they certainly aspire to recruit people who look rather more like the RAF or the Navy. The Army is much more technical these days, so will seek to have a community of people that look more like the other two Services and can work the toys.”*⁹⁹

That said, with *“political concern about cyber warfare and new threats,”*¹⁰⁰ the steady shift to a more technological Armed Forces is evident. There is already an increase in spending on digital tech, and expectations of the need for (and affordability of) fewer planes, ships, and tanks. Consequently, future talent will be both smarter and more in demand in the wider world. *“We will have seen an acceleration in the revolution that digital tech will bring - we are still near the bottom of the S-curve.”*¹⁰¹ This will also move beyond just officer level: *“Led by the Intelligence Corps, there are many soldiers with degrees. It will change, but it will not happen quickly.”*¹⁰²

Given the increased use of technology in the civilian environment, several consider that demand for ex-military talent may further expand. *“The biggest challenge for many organisations is the increasing focus on technology, and those that are trying to find their way through it to do it. It’s an opportunity for Service leavers. Financial crime and fraud are very relevant – this area has opportunities for IT security, risk management and prevention and follow up.”*¹⁰³

Alongside technological skills, the Armed Forces also train personnel in other ways which organisations, large and small, find useful. Think, for example, of leadership and problem-solving abilities, not to mention *“discipline, loyalty, leadership, communication - being very organised and thoughtful.”*¹⁰⁴ In addition, they tend to be more focused, so *“as organisations become less easy to understand but more purposeful, it should suit military personnel well.”*¹⁰⁵ Despite all this, there was a perception amongst many of those we spoke to that some civilian employers are somewhat biased against returning Service personnel, perceiving them to be difficult to employ. This is manifestly not the case for the vast majority. One proposed solution is to increase transparency between the MOD and future employers in the civilian world. *“I would like the employer of active Service people (MOD) to have a completely transparent relationship with business, such that there is complete understanding of the skills that individuals can bring from their former profession into the ‘new world’ – it’s the holy grail.”*¹⁰⁶

An Implication: Many see significant opportunity to build stronger, more dynamic pathways between commercial tech firms and those in, or transitioning from, the military.





15 The Push for Inclusion

As military policies seek to reflect changes in broader society, traditional boundaries are challenged by the wider embracing of family, diversity, and equality.

The general view that the Armed Forces are becoming empathetic to the real needs of family life, are keen to embrace diversity, and are looking at new ways to provide opportunity, was expressed by many we interviewed. That said, although open to change, it is also fair to say that not everyone felt completely comfortable with the idea of traditional hierarchies being challenged. *“Diverse workforces have more successful outcomes. But they are not the military. Should we reflect society? I’m not sure.”*¹⁰⁷ Like it or not, however, the days of Armed Forces personnel living a 24/7 existence within their own community are, in peace time at least, numbered.

But the drive for diversity also affects the make-up of the Services themselves. There are a number of areas in which the Armed Forces are embracing change. Reservations aside, for many, the primary issue is how military personnel can better represent wider society. Today is increasingly *“about the Forces wanting to reflect the society they defend. So, they need to be able to step outside of the wire and bridge that gap.”*¹⁰⁸ With more Service personnel living off-base, several consider that the traditional barrier of being an enclosed community is eroding. *“It all comes down to engagement”.*¹⁰⁹ Greater interaction with civilian life makes the transition out of the Forces easier. It also makes it easier for wider family members to build a life of their own, forging a career or, for children, going to school with a wider cohort. Some suggest that in the future, *“maybe a family would never have to live behind the wire. It will just become commonplace to live close to your work, like others do.”*¹¹⁰ Others disagree. *“I don’t think it will go that far,”*¹¹¹ as *“being in the Armed Forces is not a job, it’s a life. It’s*

*24/7.”*¹¹² So often *“there is no need to go beyond the wire and no need for life beyond the wire to come to you.”*¹¹³ The problem is, if many continue to live this way, *“with food and health paid for ... they may struggle to understand how things are done when they leave.”*¹¹⁴

One expert suggested that overall, *“there is a huge blind spot around families,”*¹¹⁵ and in particular *“veteran families are a hidden group”*¹¹⁶, with the support offered to them as *“lip service.”*¹¹⁷ Whether on or off base, greater understanding of the challenges and different needs of family life is clearly difficult. Perhaps this is down to a lack of appropriate leadership. For example, we heard reference to senior leadership of both the current Services and also the charities that support veteran communities being *“stale, pale, and male.”*¹¹⁸ Even some in senior positions hoped that, as they retire, *“boards do not appoint in their likeness, but instead bring fresh, different approaches to their leadership.”*¹¹⁹ With its still largely male focus, several consider that *“the military is not remotely there on equality and diversity.”*¹²⁰ The knock-on effect on family life was often mentioned. Despite the MOD increasing its investment into childcare support, *“children of serving personnel have been found to be at greater risk (compared to children with non-military parents) of emotional and behavioural problems.”*¹²¹ Consequently, *“you choose your career, or you choose your children.”*¹²² We heard that this disproportionately affects women, *“a lot of women leave the Armed Forces because of the challenge of balancing kids, where primary care givers are mostly women.”*¹²³

Our interviews revealed that in general, women often have a difficult transition when leaving the Armed Forces. *"It was a real hardship to leave, but the reason I left was that the military made it incompatible to serve and to bring up children."*¹²⁴ While *"there are more female veterans out there,"*¹²⁵ they currently comprise only 10% of the current Services community. As a result, integration back into society can be a lonely process. *"It is doubly difficult being both a veteran and a woman."*¹²⁶ Several we spoke to suggest it is *"amazing how little dedicated provision there is for female vets."*¹²⁷ In part, this is because *"most studies focus on men, with limited evidence based on the experience of women and families."*¹²⁸ As more women are joining the Armed Forces, the problem is becoming more pressing. *"If this is not addressed, then those problems will magnify if nothing is done about it now."*¹²⁹

Certainly, it seems that *"one of the most commonly recorded reasons for personnel leaving the military is unsuitable employment opportunities for spouses and partners."*¹³⁰ Sometimes, it seems that this is due to focus; there are simply too many other priorities to be dealt with. Other times it is due to process. For instance, *"at the moment, the military can only contact families through the Service person. So lots of information gets lost. Unless the military can get over the communications/information gap, the military will never be able to get the family involved properly."*¹³¹

We often heard the suggestion that the *"concept of family needs to be carefully considered, as there are lots of different styles of family."*¹³² Several felt *"a huge relief when the MOD recognised gay marriage and civil marriage,"*¹³³ but *"the serving community is a small C conservative community"*¹³⁴ and needs to continue to move forwards. Much can be achieved if the right tone and language are used. However, *"at a recent Sandhurst dinner, I heard some stuff that made me think that people don't understand the terminology - they are struggling to see people as just people."*¹³⁵ In terms of the MOD keeping pace with society, some have the *"impression that the two have diverged more over the last 20 years. Civil society and its ideas are racing ahead - but the Armed Forces find it difficult to have open and unembarrassed conversations. That worries me, because I see a loss of relevance."*¹³⁶

The Armed Forces are also doing their best to address issues of race and ethnicity, and have developed clear policies around discrimination. Given the young cohort from which the Army in particular recruits is more ethnically diverse than the population as a whole, it needs to improve its image among BAME people to keep its numbers up. While some consider attitudes to race have a long way to go, others see progress in comparison to other fields: *"I thought the military was in the dark ages on racism until I left and worked elsewhere."*¹³⁷

An Implication: Armed Forces charities seek to increase the diversity of their leadership in order to better serve the needs of the ex-Forces community.





16 Continuous Transition

With shorter careers and a recognition that transition is an ongoing process, not a single event, expectations and preparedness are managed from the start.

Consideration of the Armed Forces as one element of an overall career which is built on a number of different jobs, resets expectations of that job's role and impact within a progressively longer working life. *"We should think about the Armed Forces as part of a career, not a life."*¹³⁸ With ten-year occupations increasingly the norm, including in the military, moving between roles and employers is more usual in today's workplace. The need to retrain and reskill is expected as a necessary component of working life, particularly as many people are expected to work for longer.

It is clear that for the vast majority as they make their way through their professional life, they achieve *"lots of mini transitions."*¹³⁹ Joining, being part of, and leaving the Armed Forces is just part of the journey – even if it has some strings attached, *"I left 20 years ago but am still on notice for call up."*¹⁴⁰

However, a common concern is that much transition training is currently *"crammed into your last years of service."*¹⁴¹ Some argue that the transition journey should start from the first day of recruitment: *"You should start thinking about leaving the day you join. It's a mindset we haven't had before, and will increasingly become a necessity."*¹⁴² Although perhaps true in an ideal world, others responded to this suggestion with a decree of scepticism. *"There is a gap between rhetoric and reality: The MOD says preparation for leaving begins on the day you arrive, but in practice people say: 'not a chance'."*¹⁴³ More pragmatically, several see that *"it's about connecting the two worlds better, and making it clear that the military or Armed Forces can be seen as one career, not as your life."*¹⁴⁴ Moreover, *"helping personnel to consider life beyond the Forces throughout their service improves their ability to transition well on leaving."*¹⁴⁵

Clearly some sectors of the Armed Forces are better able to manage ongoing transition opportunities than others: *"It's sort of easy in some of the more technical areas"*¹⁴⁶, such as flying, where *"getting the airlines involved early is a sort of managed transition out."*¹⁴⁷ However, others found the idea of a managed transition process unappealing. *"If I'm the officer in charge of a troop, I might feel that I prepare them too well for transition and become concerned that they might leave."*¹⁴⁸ Moreover, *"one of the areas of tension is that you don't want them to be vulnerable when they leave, but at the same time don't want to speed up their departure - if you keep putting the idea of leaving in their head."*¹⁴⁹

Whenever you start, there is widespread recognition that *"the Services need to do more to prepare its members for transition well in advance of those people leaving."*¹⁵⁰ Many concur that the answer is *"something to do with better education while they are in uniform."*¹⁵¹ Being prepared for the future may necessitate a different approach to training and skills development. *"What would be good is if those coming to the end of a military career are equipped with the mental approach and skills designed for the world we live in today. We should think about creating a lifelong learning environment, rather than training people for a platform or operating system."*¹⁵²

Alongside professional skills, a common priority for many exiting the Armed Forces is the acquisition of life skills, especially those around basic finance. *“They were not managing their money very well. They have everything done for them financially. It's no wonder they come out and don't know how to do things.”*¹⁵³ This is particularly important for those who may have had challenges before joining up. *“If they join as perhaps a 17-year-old with few qualifications, and maybe with issues from their home environment, they can find a new home in the military. The trouble is, when they leave, inside themselves they might be that same 17-year-old, lacking in confidence and with the same issues that they arrived with - and maybe now a couple of other issues like physical or mental injury.”*¹⁵⁴ To support individuals such as these during service, *“we should be able to look at the military in its entirety, in terms of service, in terms of family, flexibility, lifespan, thinking about a career, but also about their transition. We need to be preparing them for civilian life, and offer a direct link into the welfare state organisations so that they know where to go for support, if things do become difficult.”*¹⁵⁵

One suggestion was that the Forces should do more to ensure business better understands the skills that veterans can offer the corporate world. We heard from one senior executive of a global organisation that *“The Armed Forces are unequivocally a great source of future leaders. Even a squaddie who joins and completes basic training has more investment in them than most people will have perhaps in all of their corporate life. Whether the individual reflects on it, or has absorbs it - it*

*elevates the individual. It is an innate understanding of what leadership and management means and can then reflect on what good and bad leadership looks like. And what is motivating, or not. This needs recognition”*¹⁵⁶

An Implication: The Armed Forces promotes the transferrable skills gained during service to the corporate world. Coincidentally transition preparation starts earlier for all ranks, and better aligns with the core needs of future employers.





GRANTS

PROJECT

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Charitable Sector Trends

All these trends have consequences for the Armed Forces charitable sector which must adapt to address the changing needs of its beneficiaries. In particular the digitisation of services is a key challenge. Changing support for the community means that a number of charities will need to work in a more collaborative manor to minimise costs and maximise reach. Traditional fundraising methods are challenged as the rise of issues-based movements capture public attention. This at a time when the ideological attitudes towards charities are changing. Government challenges their right to speak truth to power preferring instead organisations that offer practical support to those in need.



17 Greater Competition

Reduced budgets and rising demand for services drives a shift in funding priorities. Demonstrating efficiency increases competition between charities.

There are just under 170,000 general charities in the UK. They share a total annual income of about £51bn, according to the National Council for Voluntary Organisations (NCVO). The vast majority are small - meaning they have income of under £100,000. Larger charities (£1m upwards) account for about a fifth of the sector, but 80% of its income. This concentration of funds amongst a relatively small number of organisations is also reflected in the make-up of Armed Forces charities. Across all sectors, many are struggling to cope with significant shortfalls caused by years of austerity, soaring demand for their services, and more recently, lost income due to the coronavirus pandemic. This downturn is not distributed equally; those with more diversified income streams are often more resilient. However, looking ahead, many charities face finding themselves competing with each other for a shrinking amount of financial support. *"The sector is going to undergo a painful few years – there is a large number of charities - this is unsustainable: there are too many people chasing the money."*¹⁵⁷

In our discussions we heard that, as a society, the absolute amount of giving stays remarkably stable both through economic cycles and over time. However, *"if people give to disasters or emergencies, they tend to give less elsewhere."* Also, *"it is hard to raise the overall amount of giving, but there will be a shift of who is giving what. Over time, there has been a swing towards better-off people shouldering more of the giving and lower participation by the less well-off."*¹⁵⁸ Given this, some charities may do well to review their fundraising efforts, as traditional donors, those who, for example, make small contributions on a regular basis, may no longer be able to offer

the same level of support. On top of this, different generations prioritise different areas of need. Frequently in conversations with informed leaders, we heard comments such as, *"my 20-year-old children think fundamentally differently to me on racism, collaboration, the environment."*¹⁵⁹ This has an impact on their philanthropic interests and where they choose to give support.

It is clear that people donate funds for myriad reasons and that these can change depending on circumstance. We heard, *"whether people care more about themselves and their family or the community generally goes in big pendulum swings. The pandemic has caused a shift in national consciousness; it feels like we're in a community moment."*¹⁶⁰ Although it is important to ensure that charitable funds are put to good use, for many the efficiency of these funds may not be the primary reason for making a donation, and *"evidence of outcomes and effective altruism has been important for some, but not all. It isn't what motivates a lot of people to give. Quite basic items like religious affiliation and values to do with responsibility and compassion are still important."*¹⁶¹ Looking ahead, changes in what people find important may present a challenge for the Armed Forces Community. *"We are possibly in a generational shift, in the interregnum and not dealing with it very well".*¹⁶² As the generation with deep-rooted family connections to the military grows old, alternative sources of revenue may need to be found. *"The Armed Forces Community is shrinking, and therefore the veterans' community is also shrinking."*¹⁶³

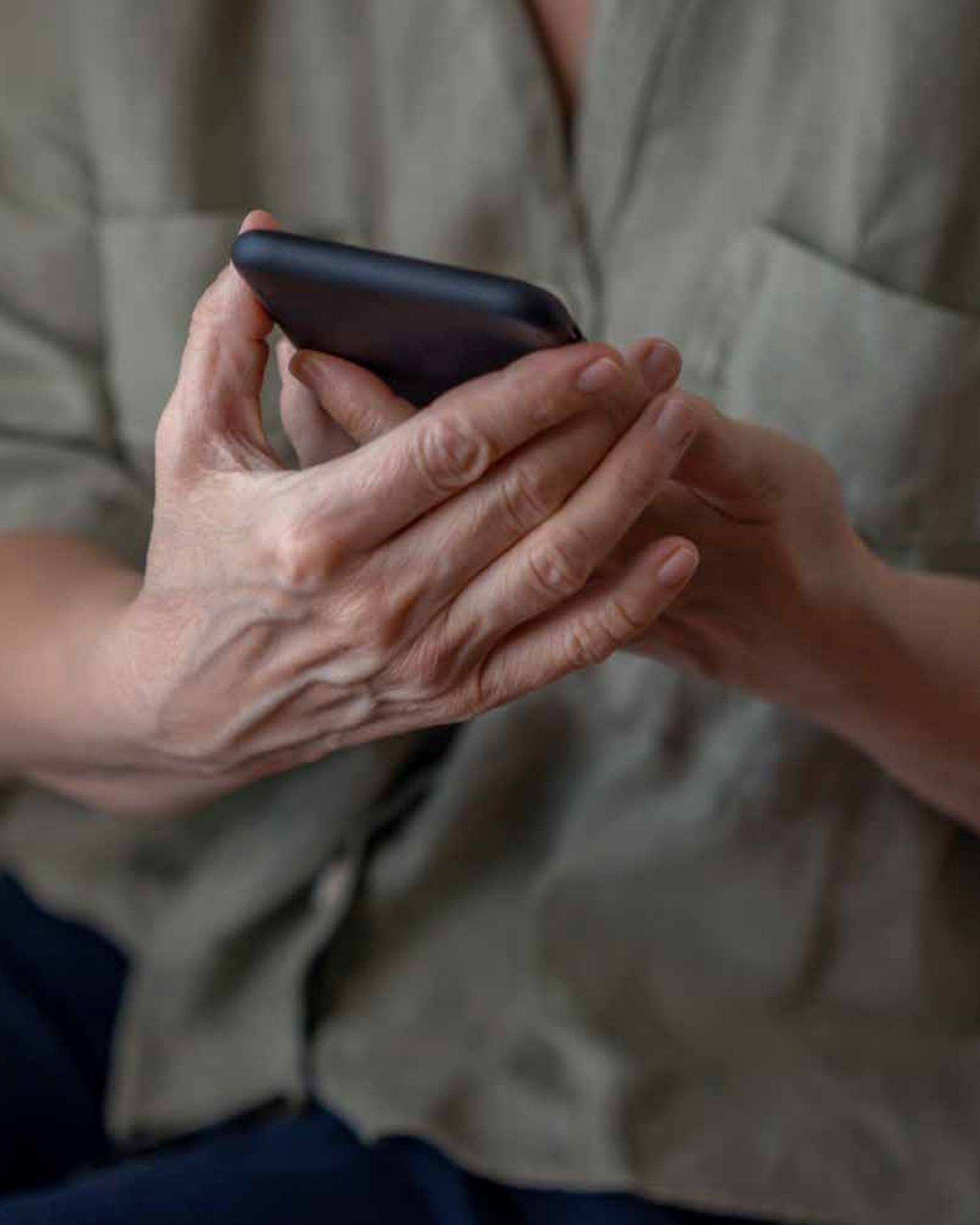
In the years ahead, all charities will face challenges in raising funds. In particular, those organisations which have not had a high profile during the pandemic will face the difficult task of attracting support when the public's attention is elsewhere. Moreover, certainly for the foreseeable future, they will be limited in what they can do to raise money. Pretty much all fundraising events in 2020 have been cancelled. Many charity shops had to shut because of the lockdown, and confidence in the safety of public gatherings is at an all-time low. The prevailing view during many of our discussions was that over the next decade: *"The Service charities will have difficulty, simply because the profile of the military will have significantly declined, as the WW2 cohort will have left us; and it is unlikely that a major conflict is on the cards to raise the profile. The Service charities will be in a tough financial place at the same time as the government runs out of cash."*¹⁶⁴

It is not all bad news, however. We often heard the view that the Armed Forces charities provide a vital role, and that central and local government are attracted to operating with their support, because of the sense of mission, independence, and trust they bring. Although many face *"a perfect storm of increased requirement and reduced means,"* the need for their services remains hugely important.¹⁶⁵ The challenge is to preserve these qualities, even as some are called upon to deliver what were traditionally considered to be public services. Over the next ten years, we may well see *"a new phase of (more) professional but smaller number of charities - with potential for a closer engagement with*

*government, and recognition that the charities are doing what the government should really be doing in accordance with the Covenant."*¹⁶⁶ Moreover, as more data enables greater transparency, the ability to better interrogate individual charity and grant performance will increase substantially. This drives both greater internal efficiency, as well as easier comparison between organisations.

An Implication: As public priorities change, support for the Armed Services Community may be marginalised in favour of different causes which are given priority.





18 Digitisation of Services

The charitable sector embraces digital platforms to improve information flow, data sharing, transparency, and the visibility of impact being delivered.

As with many sectors, charities will increasingly seek to use digital platforms, not just to make the most of the increasing quantity and quality of data available, but also to reinvent how their services can be delivered or extended. Some, however, are still cautious about its transformational potential. *“Digital has suddenly become a panacea in the eyes of some researchers, where apps are needed for everything.”*¹⁶⁷ Others are frustrated by the lack of strategy; *“it all still feels quite piecemeal.”*¹⁶⁸ But most believe we are at the start of significant change and are more upbeat: *“It will help charities to drive thinking, identify where the gaps are and where they can most effectively make a contribution.”*¹⁶⁹ Innovative initiatives such as DevicesDotNow, which helps provide internet access to those who are currently unconnected, and the Coronavirus Tech Handbook, were cited as good examples of the transformational potential data can offer.¹⁷⁰

Looking ahead, those we spoke to felt that the digitisation of services will drive the greatest change particularly around transparency, engagement, and focus. But this starts from a pretty low basis, as *“there is a huge data gap - we don't even know how many veterans there are!”*¹⁷¹

There was also widespread recognition that the way people receive and share information is changing, and for most, receiving information through an app is now perfectly normal. *“It's still the individual having to work the journey out for themselves, but it's now all about navigation and the provision of holistic services to the individual.”*¹⁷² Making it easier for the majority of beneficiaries to access support and information makes it simpler

for charities to focus *“on the ‘vulnerable few’ who transition with difficulty.”*¹⁷³ Most consider that we are now at a point of inflection: *“The Covid19 crisis has driven home to most charities that you must have digital channels, but it has also made starker digital inequalities obvious - those who are digitally excluded and those who are not. It is those who are already in the most at risk situations who don't have access, so is a compounding of that risk.”*¹⁷⁴

As more data is made available, expectations around greater transparency and visibility of impact will increase. However, the transformation may not be as speedy as some would wish. Some charities *“might be nervous about changing the model”*, as there may be modifications to *“the ways that services are commissioned, the way money is ring-fenced and allocated, which ties them to a particular model that they have been delivering for a long time.”*^{175,176} This may explain why several “look at digital with a degree of apprehension, rather more as a threat than an opportunity - it will potentially drive fundamental change.”¹⁷⁷

If used collaboratively, digital engagement and interaction can certainly help the sector better understand the needs of their beneficiaries and their families. On one level, it provides granularity about those who are vulnerable; *“we have data from financial hardship charities and grant-making organisations in this space too, and can now look geographically at where demand lies regionally.”*¹⁷⁴

On another, it *“offers further user involvement - there is more space for veterans themselves to help shape the strategy of Armed Forces charities ... I don't mean those on the board; I mean those likely to need to use the services.”*¹⁷⁹

It seems, as we heard in one interview, that *“it's a generational shift, are in the interregnum and not dealing with it very well. But it's a generational shift on steroids, so we will have to adapt.”*¹⁸⁰ Although this may still be disorienting for some, there is a sense of optimism that there will be significant positive change in the decade ahead. *“Data is much more powerful in a way than charities simply reporting on their outcomes - it shows what people really need.”*¹⁸¹

An Implication: Digital-first service delivery will allow bespoke support pathways to be created and easily accessed by beneficiaries, but this may challenge existing processes.





19 Deeper Collaboration

Common ambitions, better partnerships, co-design initiatives, and shared funding allow some charities to align their activities for more effective impact.

Many of those we interviewed agreed that, accelerated by Covid19, the Armed Forces charity sector is entering a period of significant readjustment. This, in part, reflects concerns over future funding, but more a belief that there are probably too many of them for the projected size of the veteran community in the coming decade, albeit a community with an increasingly diverse range of beneficiaries in need of help. A fundamental question emerges around how best to deliver effectively using significantly reduced resources. Many agreed that *“we must do things radically differently. We will be more collaborative, more systemic, and also take time to take a moment to pause and work out what we were trying to achieve in the first place.”*¹⁸² The hope is that when organisations with a common aim work together, they can cut costs, improve outcomes, and reduce duplication. As a result, they can better reach and support their beneficiaries and their families over a longer period.

Co-designed initiatives work especially well. In particular, the gathering of data and the provision of information are some of the things that many consider should be non-proprietary. Although *“it is not as well developed as in the wider charity sector”*¹⁸³, initiatives such as the Veterans Gateway offer good examples of how veterans and their families can be helped, by providing access to relevant resources and information from a network of organisations. From a government perspective, the recently established Office for Veterans' Affairs (OVA) aims to facilitate collaboration between departments. Hopes around its future impact are high: *“If the OVA took the generation of research under its wing, then you would have evidence already inside government, and it would really help*

*to make a difference.”*¹⁸⁴ Also, *“if it does its job right and builds the environment in government that understands the needs of veterans, within the context of what wider society needs, and has great services for them such that for each department, veterans are business as usual, then in ten years' time we shouldn't need it.”*

Some suggest that *“there are opportunities to collaborate with close partners, including the police, the emergency services, and other organisations dealing with similar sorts of issues.”* The Armed Forces Covenant, established in 2000 and now signed by all 407 local authorities in mainland Great Britain, plus four Northern Ireland councils, alongside thousands of other organisations including businesses and charities, supports this type of cross-working. It sets out the relationship between the nation, the government, and the Armed Forces, and establishes how veterans should expect to be treated, offering the basis for future cooperation between Armed Forces charities, local government, and multiple corporations. Some felt that its very existence has already been sufficient to drive change: *“Sometimes I feel we are done here.”*¹⁸⁵ But others feel that it has yet to be effective: *“You are supposed to have veteran champions in a Local Authority, but there is a massive disconnect between Armed Forces life and what local government can provide. More needs to be done around mental health and housing provision. All of these things can only be solved at local level, but I'm not sure the understanding is there.”*¹⁸⁶

The third sector, more broadly, is also making changes. We heard in particular that *“foundations are starting to work better together in new ways*

*that could be quite profound. There are more joint portals for grant applications, so they can see each other's work and what they are doing. They are sharing ideas and information in a way that they haven't done before."*¹⁸⁷

Some felt that the problem around collaboration really lies more specifically with the Armed Forces charity sector itself, although work is being done to address this. For example, *"to encourage collaboration, post the emergency phase of Covid19, there will be a collaborative hub to allow the sector to know what else is going on and who they can collaborate with - to enable a better focused delivery and leveraging of pooled funding. We would love to have one around veterans."*

Although on a practical level it seems that most charity staff want to co-operate with each other, *"the issue is how to get senior leaders working collaboratively better. They talk a good game, but people still have an urge to make their organisation look the most effective."*¹⁸⁸

Many we spoke to felt good examples of wider collaboration are quite thin on the ground. Indeed, sometimes we heard little enthusiasm for the idea at all. *"How much impact can be gained from better collaboration of existing support versus adding more support? Difficult to say."* We also heard that *"charities, for all the thunder and lightning, are still business organisations. While they determinedly work for beneficiaries - I suspect they are blind to their own organisational ego and the sense of self-preservation that this places on themselves."* As one participant observed, *"this doesn't actually benefit the ultimate beneficiaries."*¹⁸⁹

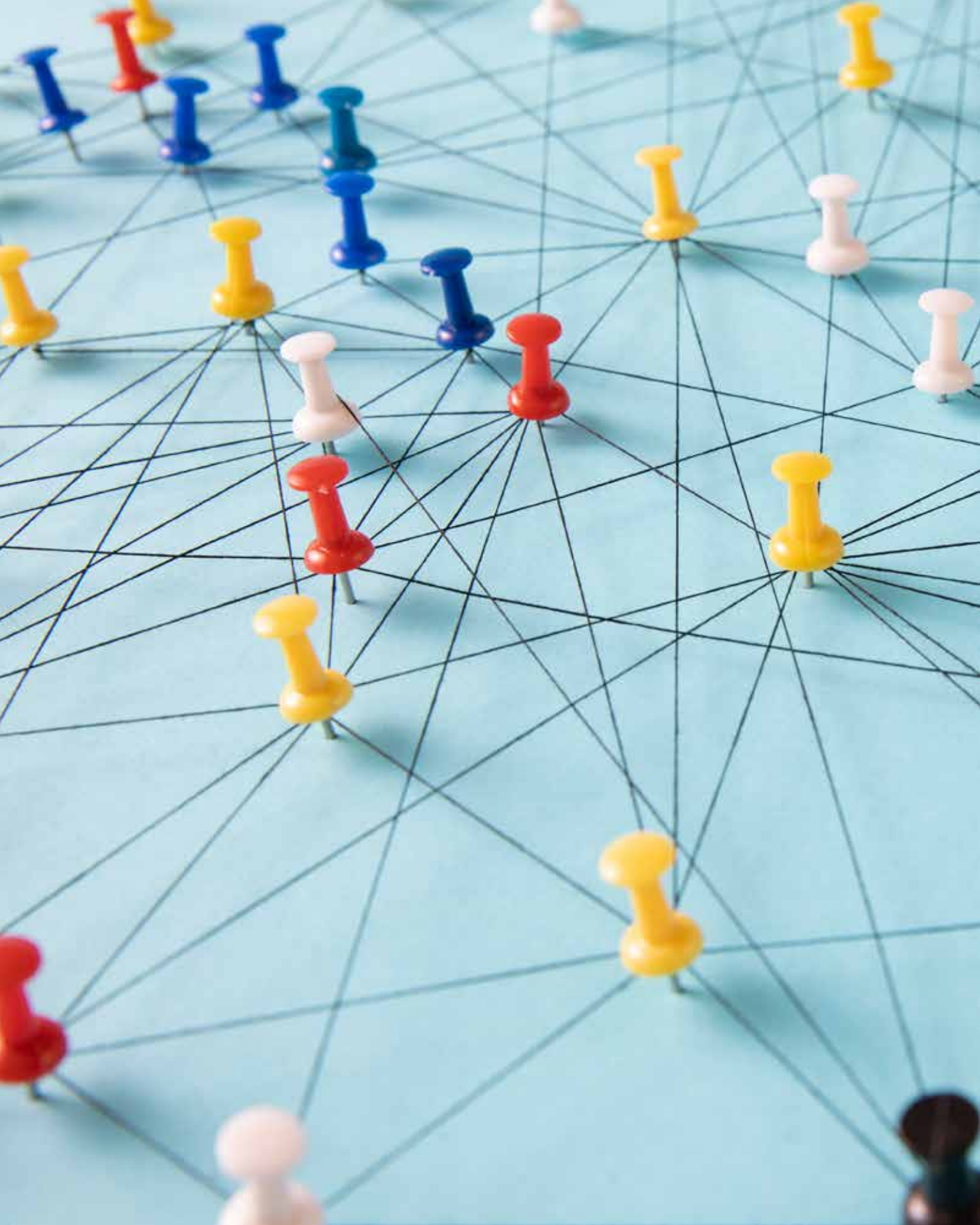
And yet, when it works, collaboration is an effective way of accelerating learning. This is much needed, as the Armed Forces charities work harder to remain relevant. *"There is a challenge to the sector as to whether it can change as Service leavers change."*¹⁹⁰ At a time when the Armed Forces veterans are diversifying, sharing experiences about how best to support cohorts such as women, the BAME, or the LBGT+ communities, will build much needed knowhow and understanding.

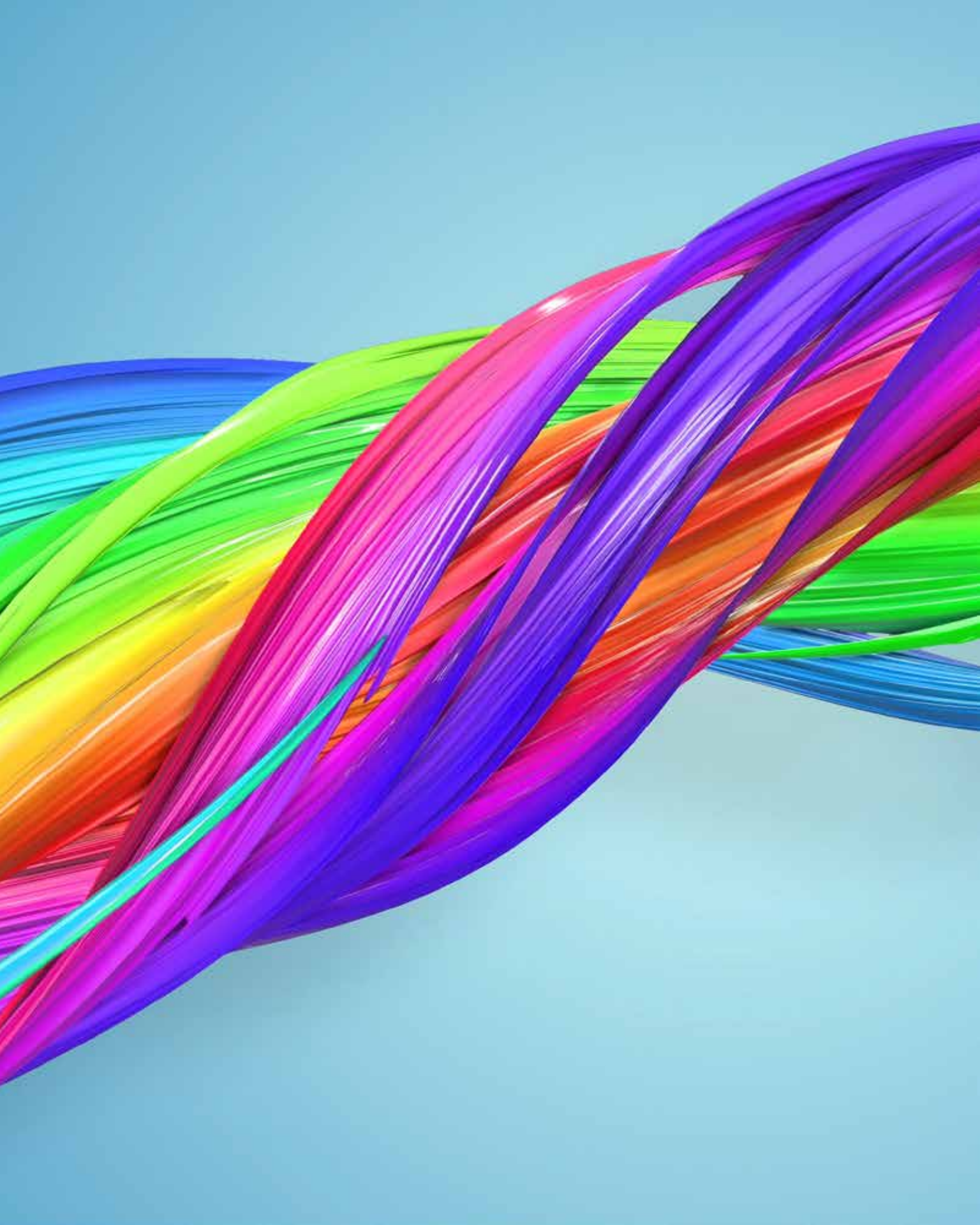
Some were concerned that change among Armed Forces and the supporting charities has not come fast enough: *"The Armed Forces need to keep pace with society. My impression is that the two have diverged more over the last 20 years - civil society and its ideas have raced ahead - and that worries me because it suggests a loss of relevance."*¹⁹¹

Others were more confident that at least the MOD is adapting to modern lifestyle choices; *"... there are clearer policies now and the MOD is working better in collaboration with the Armed Forces sector to get messages across. They have released a holistic defence transition policy. It's about family as well - and there is recognition also that the "traditional family" of 2.4 children is no longer an issue."*¹⁹²

Looking ahead, it is clear that the next ten years will see a transformation for many Armed Forces charities: possibly not all of them will survive in their current form. *"Covid19 will force rationalisation. If managed properly, it may put charities in a better position to serve better. This doesn't mean retrenchment".*¹⁹³ *"For some time, we have been aware of the need to drive efficiency and rationalisation in our sector - too much duplication, too many organisations, too many staff - not as much as people think, but still, change is needed."*¹⁹⁴

An Implication: As funders align on key priorities, a series of under-funded but possibly high impact niche service gaps emerge for future benefit.





20 Embracing Movements

More nimble hybrids combine the strength of charity with the fluidity and freedom of people-powered movements.

Today, more of us are tiring of traditional fundraising organisations and are uniting around particular issues. People-powered movements are on the up. The growth of decentralised networks and the immediacy of social media have made it possible to connect millions to a single cause. All over the world, individuals have self-organised behind a hashtag and, through this, can drive significant change for something that matters to them. Many find this liberating. *“These organisations are seeking to avoid being formalised, which is part of their attraction.”*¹⁹⁵ Established charities find this is both an opportunity and a challenge. The opportunity is to develop an ongoing relationship with an energetic new support base. The challenge is how to embrace or work with them within the constraints of charity regulation, particularly when there is often no defined leadership or governance structure in place.

Capitalising on grass-roots support is of course not new. Indeed, in the UK, the Armed Forces charity Help for Heroes is well known for its ability to motivate millions over a short time period. Inspired by the seemingly inadequate care given to injured soldiers returning from Iraq and Afghanistan, it sparked a wave of youthful idealism and patriotism among its supporters, and was able to grow into a multimillion-pound phenomenon as a result. *“Help for Heroes appeared because there was a glaring gap in provision, and so a new organisation stepped in to fill the gap.”* Much has been learned from successes such as this, but ten years on, when support for causes is even more fluid and informal, we heard caution, *“I don’t think the Cobseo charities are thinking like that - not thinking about it with a broad holistic agenda.”*¹⁹⁶

Movements such as Black Lives Matter, #MeToo, and XR (Extinction Rebellion) all provide examples of the way in which people are now choosing to spend their energy, and importantly, donate money. They believe that giving directly to a cause, rather than through a formal charity, provides a flow of future cash directly to the front-line. *“These organisations are seeking to avoid being formalised, which is part of their attraction for people.”*¹⁹⁷ This allows flexibility, and as long as change is happening, few have questioned where the money flows. *“XR or BLM - these are unregulated: no one quite knows where the money is going, but people can see the impact.”*¹⁹⁸ This lack of clarity may only be acceptable in the short term. As they evolve, some see the inevitability of movements becoming less fluid in order to continue to drive and measure positive impact: *“If they want a financially resilient model, they may have to change, because with that, and the need to attract funds, comes greater governance and safeguarding.”*¹⁹⁹ Already there are, for example, *“lots of internal conversations in XR about having a legitimate arm to collect money.”*²⁰⁰

Movements are also seen by some as the fastest way to create political policy change, particularly where orthodox advocacy has demonstrably failed to deliver change at pace. Greta Thunberg's Fridays for Future international climate movement is a case in point. By overtly representing the voice of the people on a single issue, it becomes harder for policy makers to ignore, particularly when they themselves are elected democratically.

Looking ahead, this could go in two ways. Today's cause-driven movements do indeed become hybrids - more formalised organisations that can fit within the established governance of charities. More disruptively, cause-driven movements scale and capitalise on the support for their new approaches – becoming major conduits for future funding flows, and so leaving traditional charities behind.

An Implication: Foundations and charities change core policies to better enable working with appropriate grass-roots movements and the charity regulation framework adapts to support these changes.





21 Ideological Rethink

The UK government believes that charities should support those in need - but not shape policy or speak truth to power.

In 2020, the UK Chancellor of the Exchequer, Rishi Sunak, publicly described charities' "gentleness" as their hallmark contribution to the national effort against Covid19: *"At this time, when many are hurting and tired and confined, we need the gentleness of charity in our lives."*²⁰¹ We heard a number of different views in reaction to this comment. To some, it marked a clear ideological shift from previous administrations, and a curtailment of power from the charities; to others, it was more a reflection about the centralisation of government. *"This government is more ruthless, but also more romantic in a way."*²⁰² In the eyes of one charity leader, *"Rishi meant his comment as a compliment. He is very far from being the only person to express a limited, partial view of charities as if he were describing the whole."*²⁰³

It is certainly clear that this incident has served to highlight the need for the third sector to re-evaluate its relationship with the state. *"It has been a real wake-up call. Charities thought they enjoyed a bigger profile with the government. It was around building and delivering public services, supporting the Big Society, about volunteering and local action. But over the last six months, there has been a real downgrading of charities' relationship with government. Almost a hostility towards them."*²⁰⁴

One suggestion we heard was that there are those in government who *"wouldn't mind seeing some charities fail, in order for them to be replaced by volunteerism or local community support. They think there should be less lobbying or hard-edged, policy-based charity."*²⁰⁵

Not everyone agreed with this. Rather than see it as a problem, they prefer to turn it into an opportunity to shine a light onto the need to add new rigour into the delivery of services. They argue that influencing policymaking is a key tenet of the third sector, and because of their unique relationship with those in need of support, charities should continue to speak truth to power because their experience gives them legitimacy: *"Many charities are rightly none-too-gentle, as they give voice to the oppressed and challenge injustices like modern slavery, patriarchy, racism, environmental destruction, or the other evil giants of our day."*²⁰⁶ However, they acknowledge the need to be more professional in the delivery of this "truth", and emphasise the importance of evidence-based research to identify need, and validate activity. *"One of the greatest problems with the charitable sector is that their approach to evidence is simplistic."*²⁰⁷ Looking ahead, *"just frankly having some useful data built off strong qualitative and quantitative evidence - to show all stakeholders the areas where we need to work together to fix them, would really make a difference."*²⁰⁸

An Implication: The need to appropriately support strong, quality, independent (of government) advocacy is a gap to be filled.



Next Steps

Many of those who are leaving the Armed Forces to enter civilian life find their transition to be a positive one. Most choose when and how to leave, and are able, within a reasonable timeframe, to re-establish themselves in civilian life, building new careers and going on to enjoy a rich and fulfilled life. However, a small percentage are not so lucky. There are multiple reasons for this, some of which are touched on in this discussion paper.

The purpose of this document is to act as a provocation for further discussion. To do this, it has identified the macro issues that will drive change over the next decade, and explores some of the major future trends which will impact the Armed Forces Community over the next decade.

The next phase of the research will delve more deeply into the nature and implications of these trends, and how they may impact the specific issues that are relevant to transitioning Service personnel. This may include areas such as the future of housing, work and career opportunities, mental health, and wellbeing.

As with all Future Agenda initiatives, we welcome your comments and support, and are keen to engage with as wide a range of stakeholders as possible. We wish to explore questions such as: what has been missed; what do you agree with; as well as where can further depth and detail be usefully added?

To this end, we will be hosting a series of digital workshops between September and November 2020, which will enable us to explore the key challenges and opportunities ahead, and better understand how they may impact transitioning Service personnel in the future.

If you have a contribution to make or would like to be involved, please email us at douglas.jones@futureagenda.org



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