



State of the State 2025: Wales  
A view from the people who  
use it and the people who run it



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## Methodology

*The State of the State* blends two forms of research. To understand public attitudes, Deloitte and Reform commissioned Ipsos UK to conduct an online survey which achieved responses from 5,721 UK adults aged 16-75, between 13 and 19 December 2024. Quotas were set to reflect the known profile of the UK adult offline population and a boost sample was achieved in Scotland, Wales and Northern Ireland. In total 687 responses were achieved in Scotland, 697 in Wales and 501 in Northern Ireland. For the UK figures, results have been weighted back to the correct proportion for each nation. Where responses do not sum to 100 this is due to computer rounding or questions which require multiple answers to be chosen.

Our qualitative research comprises interviews with more than 80 leaders in government and public services. They include senior civil servants, police leaders, council chief executives, NHS officials and elected representatives. The interviews took place between October 2024 and February 2025.

**The views of interviewees quoted in this report are their own and not the views of Deloitte or Reform.**



# Introduction

Welcome to *The State of the State 2025*.

For more than a decade, this annual report has brought together a survey of the Welsh public alongside interviews from government and public service leaders. By fusing these two research elements, it provides a **view of the state from the people who rely on it and the people who run it**.



*The State of the State 2025* finds the Welsh public concerned about the cost of living and the NHS, alongside rising worries over defence. Our survey also finds people in Wales uniquely focused on the state of infrastructure compared to other parts of the UK – the public recognises the need for connectivity as fundamental to our economic success.

Our interviews with public sector leaders, as ever, were fascinating, sobering and uplifting in equal measure. They told us about the serious challenges faced by many public services after a tough decade.

But they also told us about their optimism for bold reform and transformational opportunities – as well as tough choices – awaiting the next Welsh Government in 2026.

This report for Wales can be read in tandem with our UK report for a dual perspective. In the meantime, thank you to everyone who took part in our survey and all the exceptional leaders that shared their thinking to inform our research. We hope *The State of the State* continues to bring evidence to debates on public sector reform and celebrates everything that government and public services achieve.



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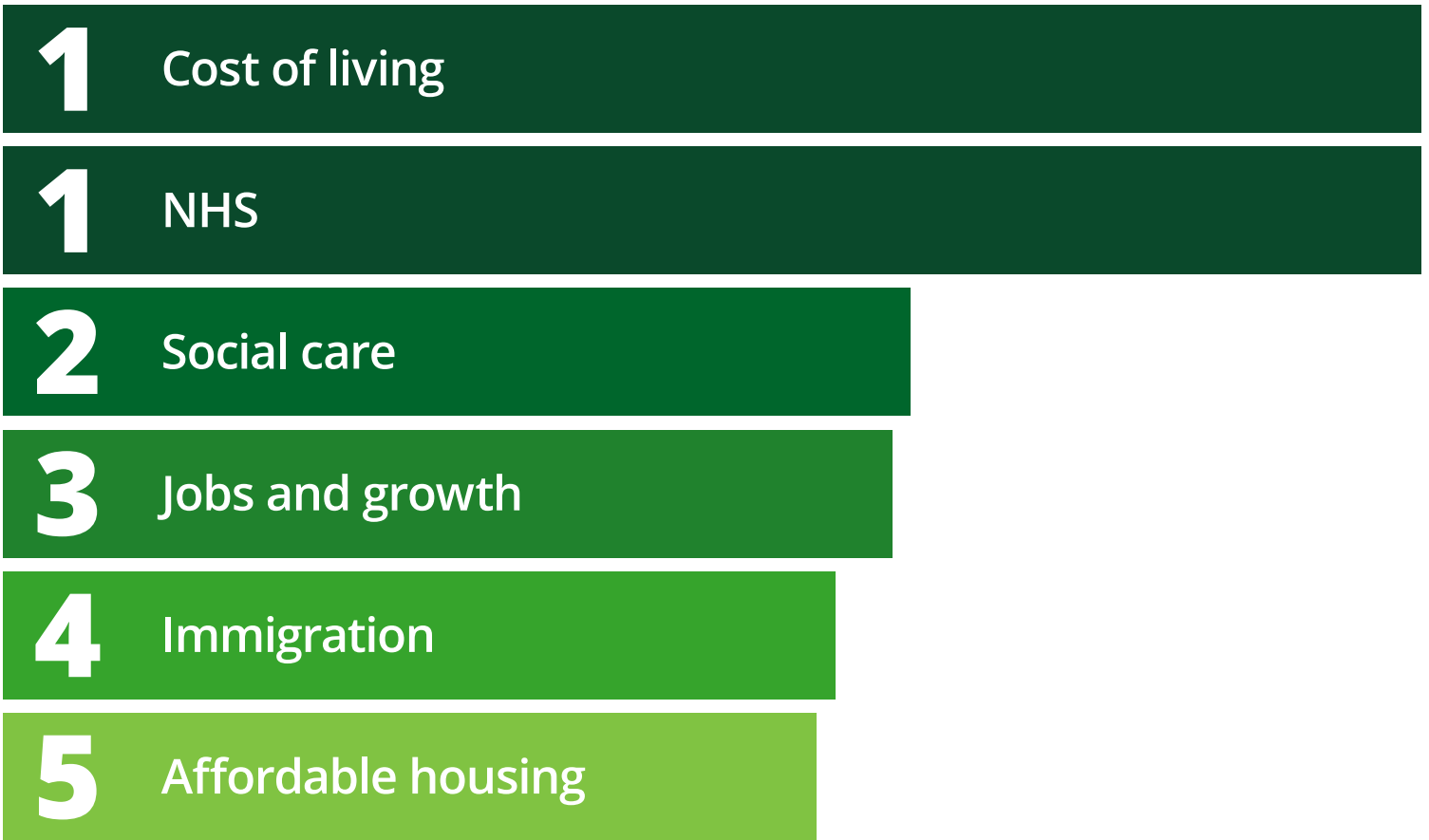
**Charlotte Pickles**  
Director  
Reform



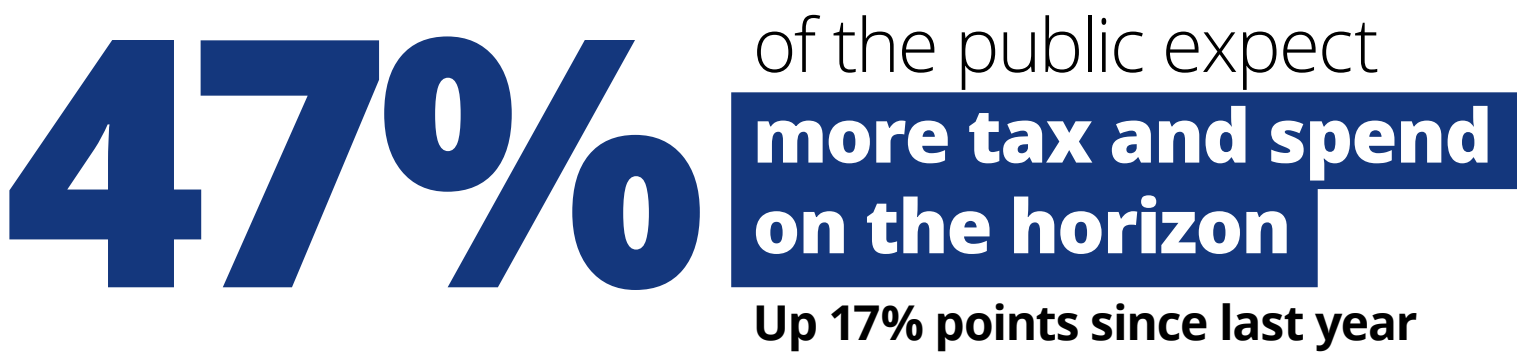
# The State of the State 2025

Welsh citizen survey at a glance

## The public's top five priorities for improvement



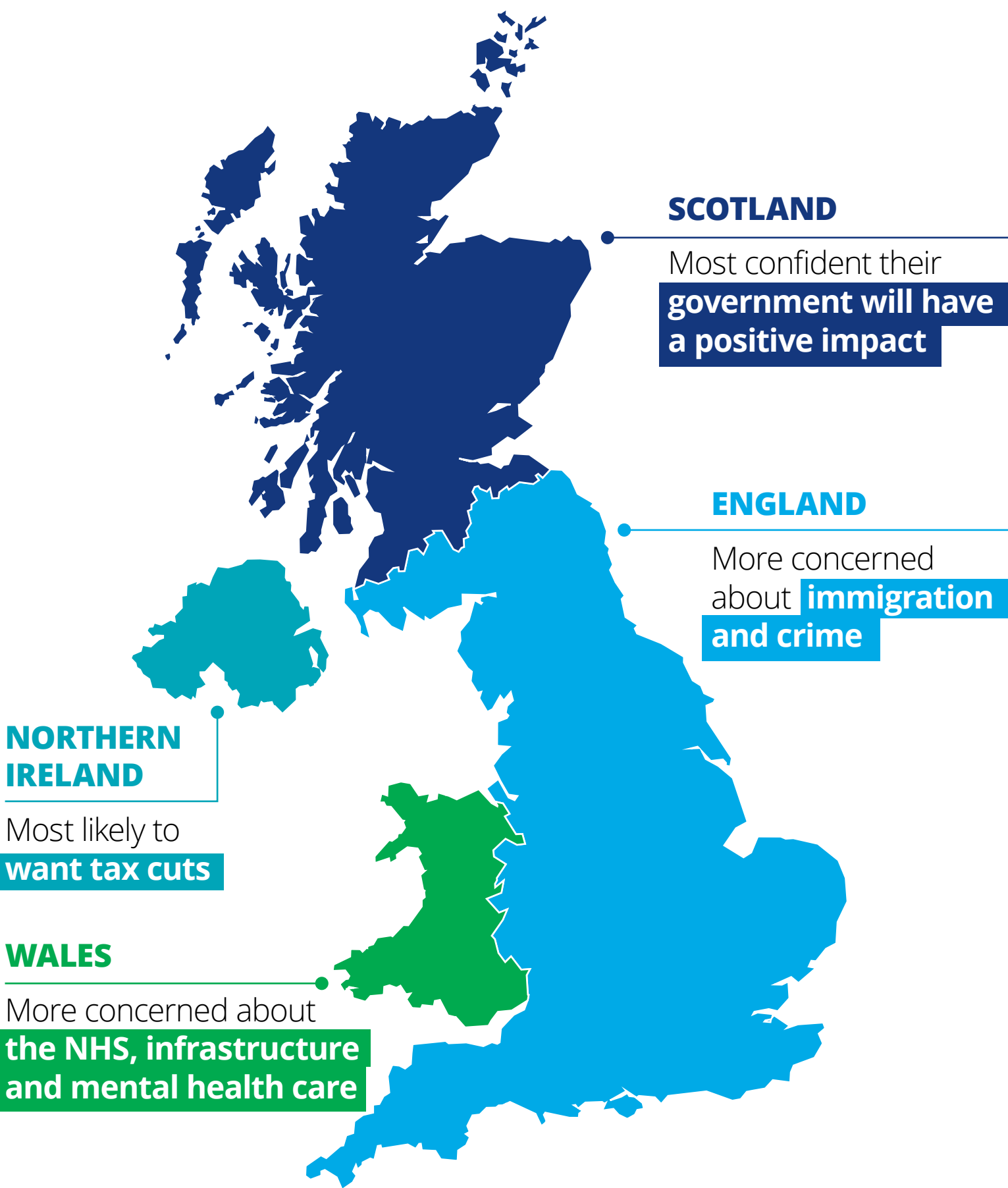
## Taxing times?



## Are we becoming climate complacent?



## A United Kingdom of nations and regions





# The State of the State 2025

Interview insight at a glance

Our report is informed by interviews with more than

80

UK public sector leaders including elected representatives, senior civil servants, police leaders, council chief executives and NHS officials.

## Key themes from our research interviews

- 1. The 2026 Senedd election is already looming large on the horizon
- 2. Tough choices but transformational opportunities await the next Welsh Government
- 3. Local government: reorganise, reform or retrench?
- 4. Infrastructure must pave the road to growth
- 5. Faith in net zero remains strong but leaders sense a lull in priority, pace and progress

## Five quotes that define the state of the state 2025

“ The first requirement of any government is to know **they can be replaced. That’s healthy.** ”  
Member of the Senedd

“ We should **accept** the number of local authorities we’ve got **and make it work.** ”  
Council Chief Executive

“ Westminster is behind the curve from us in terms of integrated transport. **Our big difference is we have a vision.** ”  
Director, Arms-Length Body

“ **The risk is in staying reactive.** You can’t be strategic and get in front of issues like climate when you’re permanently on the back foot. ”  
Council Chief Executive

“ We haven’t got the people to put wind farms up, or work on tidal energy. **The green agenda isn’t getting anywhere.** ”  
Member of the Senedd





In three words

Each of our interviews with public sector leaders ended with the same question: **what's the state of the state in three words?** Here are their answers.





# Executive summary

*The State of the State* provides an annual view of the public sector from the people who use it and the people who run it. The report blends two forms of research by bringing together a survey of the UK public alongside interviews with government leaders.

Our survey, conducted by Ipsos UK, polled 5,712 UK adults about their attitudes to government and public services. This included 697 adults in Wales. For our interviews, we spoke to more than 80 public sector leaders including senior civil servants, council chief executives and NHS leaders in all nations of the UK.

## In summary

*The State of the State 2025* finds the Welsh public deeply concerned about the cost of living and the NHS alongside rising worries over defence. Our survey also finds people in Wales more focused on the state of their infrastructure compared to other parts of the UK. Across the public sector, leaders are ambitious for change that will put services on a more sustainable footing. And with a Senedd election on the horizon in 2026, many are anticipating tough choices but transformational opportunities awaiting the next administration.

## Ten key findings



### NHS and cost of living remain public priorities for action

Our annual poll on public priorities finds the Welsh public most concerned about the NHS and the ongoing cost of living crisis.



### The people's growth plan: improve our health, skills and infrastructure

As government at every level pursues growth, our survey asked the public what they see as the biggest drivers. The three top answers in Wales were improving the nation's health, improving skills, and investing more in infrastructure.



### Trust matters

More than half the public surveyed told us that 'losing public trust' is a significant challenge for Welsh public services. Against that backdrop, the survey found a relatively buoyant level of trust in the Senedd compared to the UK government, but on the whole still negative with concerns around its ability to deliver major projects.



### Amid green shoots of positivity, Wales is worried about the NHS, infrastructure and defence

Whilst our survey shows green shoots of optimism among the public, it also finds that people in Wales are relatively pessimistic for the future of the NHS, infrastructure and defence



# Executive summary

## Ten key findings *(continued)*



### **Wales is broadly split on attitudes to tax and spending but expects tax rises on the horizon**

Our survey finds the Welsh public broadly split on whether they would prefer lower taxes or higher public spending – with a slight preference for lower taxes. But the number of people expecting taxes to increase has gone up significantly in the past year.



### **The 2026 Senedd election is already looming large on the horizon**

After decades of relative stability in Welsh politics, recent years have seen some rapid changes at the top of government. The election of a new administration in Westminster has added to that sense of change, and focused attention on the 2026 Senedd election – the first under a new set of electoral rules.



### **Local government: reorganise, reform or retrench?**

Several interviewees talked about the pros and cons of local government re-organisation – but some in local government argued that the more pressing question is what to reform rather than whether to reorganise.



### **Tough choices but transformational opportunities await the next Welsh Government**

Public sector leaders told us that tough spending choices will await the next Welsh Government. But they also argued that a fresh mandate will open up transformational opportunities in the system that the next administration can take forward.



### **Infrastructure must pave the road to growth**

Our interviews explored public sector leaders' views on economic growth, surfacing a range of conflicting perspectives. A number of parliamentarians questioned the Welsh Government's engagement with business while council chief executives told us that Government's infrastructure spending is key.



### **Faith in net zero remains strong but leaders sense a lull in priority, pace and progress**

Climate change remains a big issue for many leaders across the public sector but is not the priority many want it to be. Interviewees told us that relentless day-to-day pressures leave them with little bandwidth or resources to make progress on the road to net zero. At the same time, public interest – and the political urgency that comes with it – seems to have waned.





# Executive summary

## Recommendations



Our research points to **four recommendations**:

### 1. Set out a long-term vision for the public sector and how it will improve life in Wales

Public sector leaders told us they **want to see bold reforms** that will see services more joined-up, more citizen-centric and better exploiting the potential of technology. While the Welsh Government's current plans are focused on fixing the sector's immediate challenges, our research suggests the **need for a longer-term vision for the sector.** That vision could go beyond fixing the sector's problems to providing a compelling view of what the Welsh Government and public services could look like in the future, how it could feel to work in, and what it could do for the public.

### 3. Grow the public sector's 'halo effect' technology successes

While commentaries often focus on the problems, the UK's public sector have **rolled out some world-leading uses of technology.** Rather than re-invent new solutions at every turn, the sector should consider how it can grow out its best examples – the projects with a halo effect – into new uses.

### 2. Turn up the volume on the green agenda

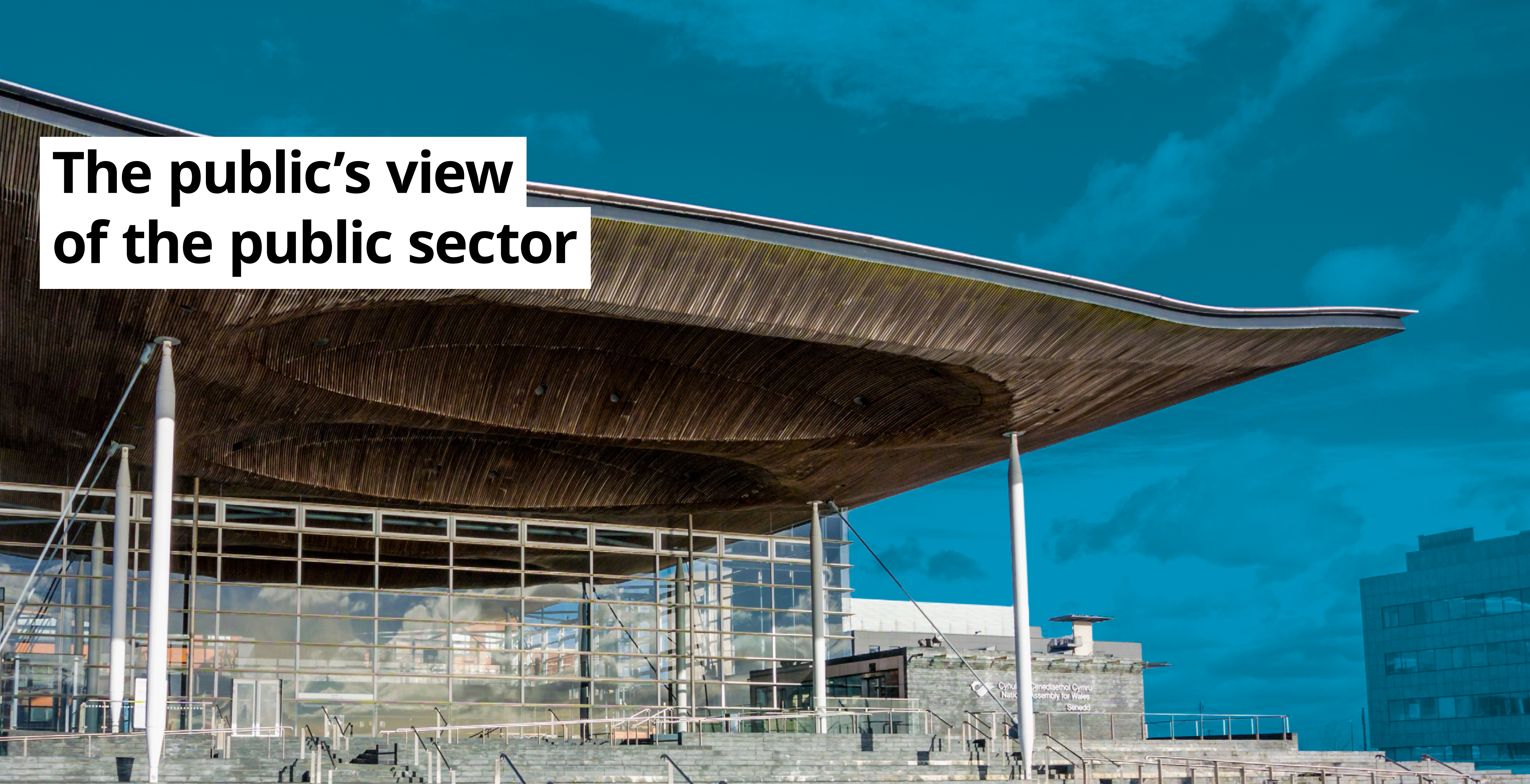
Our research finds the public becoming less worried about climate change – perhaps even complacent – and public sector leaders concerned that net zero targets will not be met. That suggests **a pressing need for every organisation and business engaged in net zero transition** to engage the public in the climate agenda and why it matters.

### 4. Provide regular figures on the 'public sector gap' the funding pressures on public services.

Our survey shows the public understand **the funding pressures on public services.** That view is informed by regular updates on the state of the public finances and budget settlements across the public sector. What's missing is a view on the gap between what those funding settlements can achieve versus the demands on them.



# The public's view of the public sector





# The public's view of the public sector

Our annual *State of the State* survey, delivered by Ipsos UK, tests the public mood on government and public services.

This year finds the Welsh public increasingly concerned about national security but climate change has slipped down their list of priorities.

Our annual questions on trust, confidence and optimism also suggest a turnaround in attitudes. After years of growing pessimism, the survey shows more positive sentiment towards government and public services.

This section of *State of the State* sets out the findings from our latest survey.



## Key takeaways



### NHS and cost of living remain public priorities for action

Our annual poll on public priorities finds the Welsh public most concerned about the NHS and the ongoing cost of living crisis.



### The people's growth plan: improve our health, skills and infrastructure

As government at every level pursues growth, our survey asked the public what they see as the biggest drivers. The three top answers in Wales were improving the nation's health, improving skills, and investing more in infrastructure.



### Amid green shoots of positivity, Wales is worried about the NHS, infrastructure and defence

Whilst our survey shows green shoots of optimism among the public, it also finds that people in Wales are relatively pessimistic for the future of the NHS, infrastructure and defence.



### Trust matters

More than half the public surveyed told us that 'losing public trust' is a significant challenge for Welsh public services. Against that backdrop, the survey found a relatively buoyant level of trust in the Senedd compared to the UK government, but on the whole still negative with concerns around its ability to deliver major projects.



### Wales is broadly split on attitudes to tax and spending but expects tax rises on the horizon

Our survey finds the Welsh public broadly split on whether they would prefer lower taxes or higher public spending – with a slight preference for lower taxes. But the number of people expecting taxes to increase has gone up significantly in the past year.

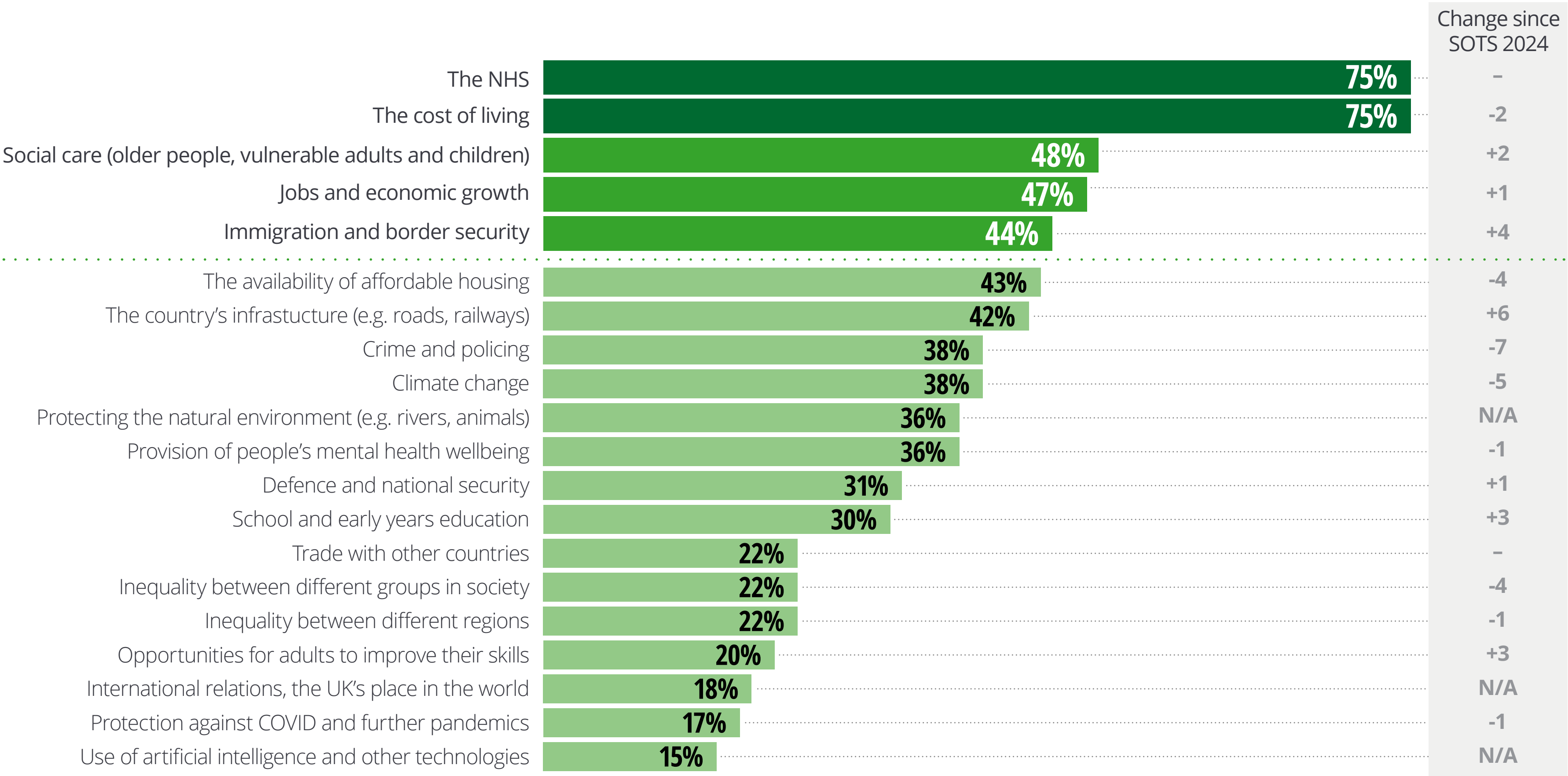


# Rising concerns over infrastructure but cost of living and NHS still top public priorities in Wales

Our survey asked the public to name their top priorities for improvement. For the third year, the Welsh public see **the cost of living and the NHS as their top priorities for improvement.**



Q: Which of the following should be top priorities for improvement in the UK over the next few years or so?



Base: 697 online adults in Wales 16-75



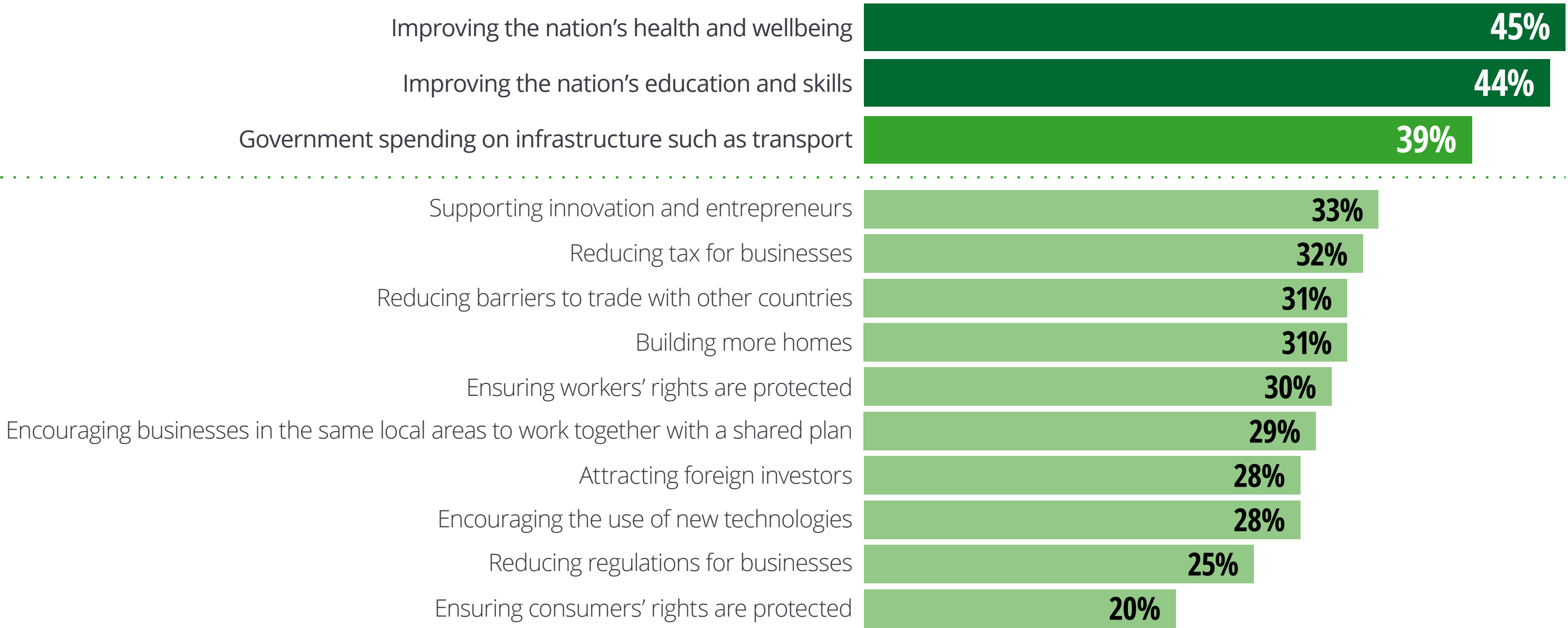
# The people’s growth plan: improve our wellbeing and skills

As government at every level pursues economic growth, we asked the public which factors they believe will deliver a stronger economy.

In Wales – as in the rest of the UK – the top two responses were ‘improve the nation’s health’ and ‘improve the nation’s education’. That is a reminder that while a pro-growth environment for business is important, a pro-growth environment for people matters as well.

In common with Scotland, the Welsh public place spending on infrastructure as the third most important factor.

**Q: Which of the following, if any, do you think are most important for improving economic growth in Wales over the next few years?**



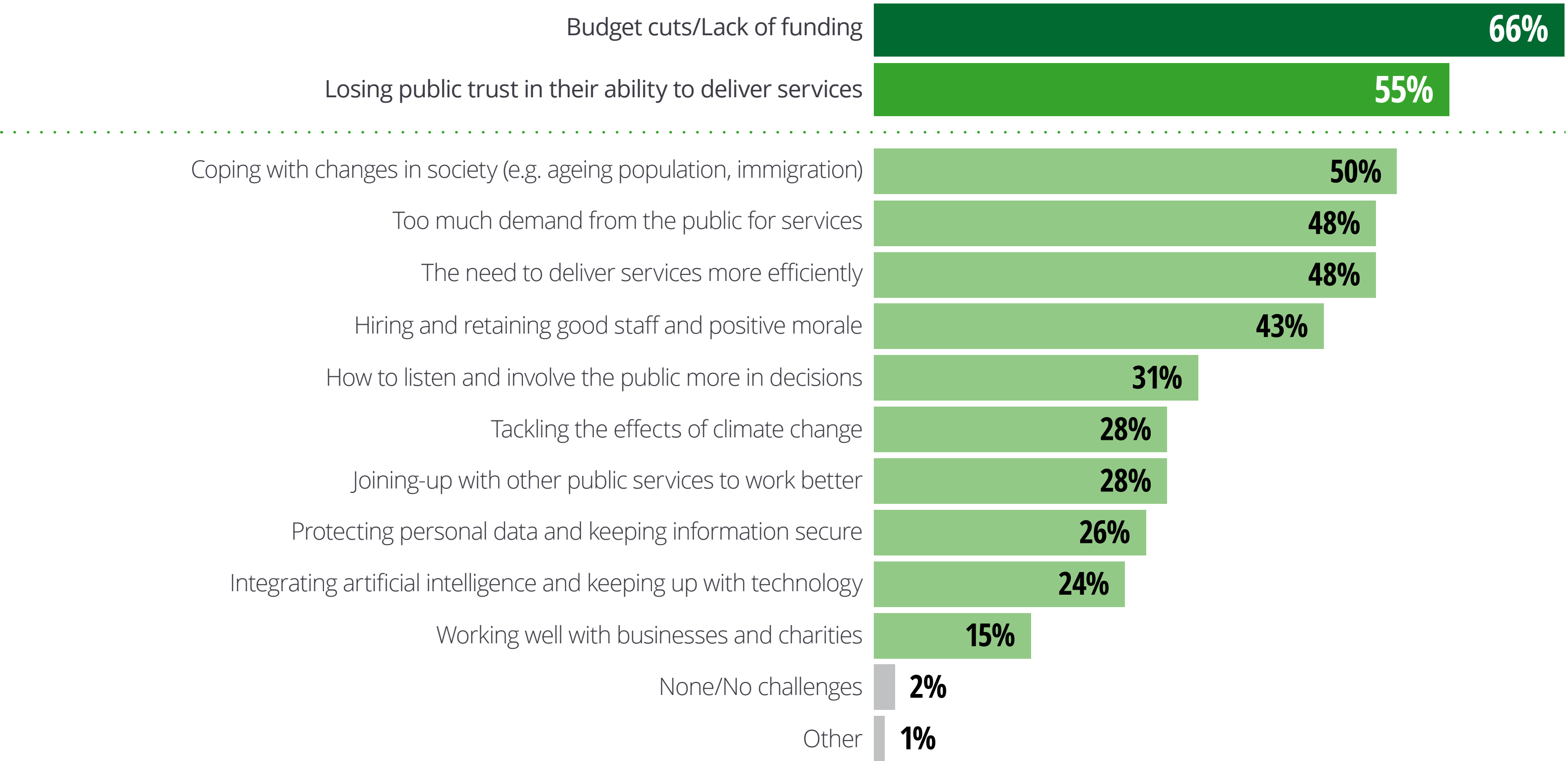
Base: 697 online adults in Wales 16-75

# The Welsh public understands public service pressures, but trust matters too

Our survey asked what the public see as the biggest challenges to public services in the years ahead. Across UK nations, by some margin, the most common answer was lack of funding. This suggests **widespread understanding about the strain on the public finances.**

The second most common response – mentioned by more than half the public – was **the risk of public services losing their trust.**

**Q: Which of the following, if any, do you think will be the biggest challenge(s) for public services as a whole over the next five years?**



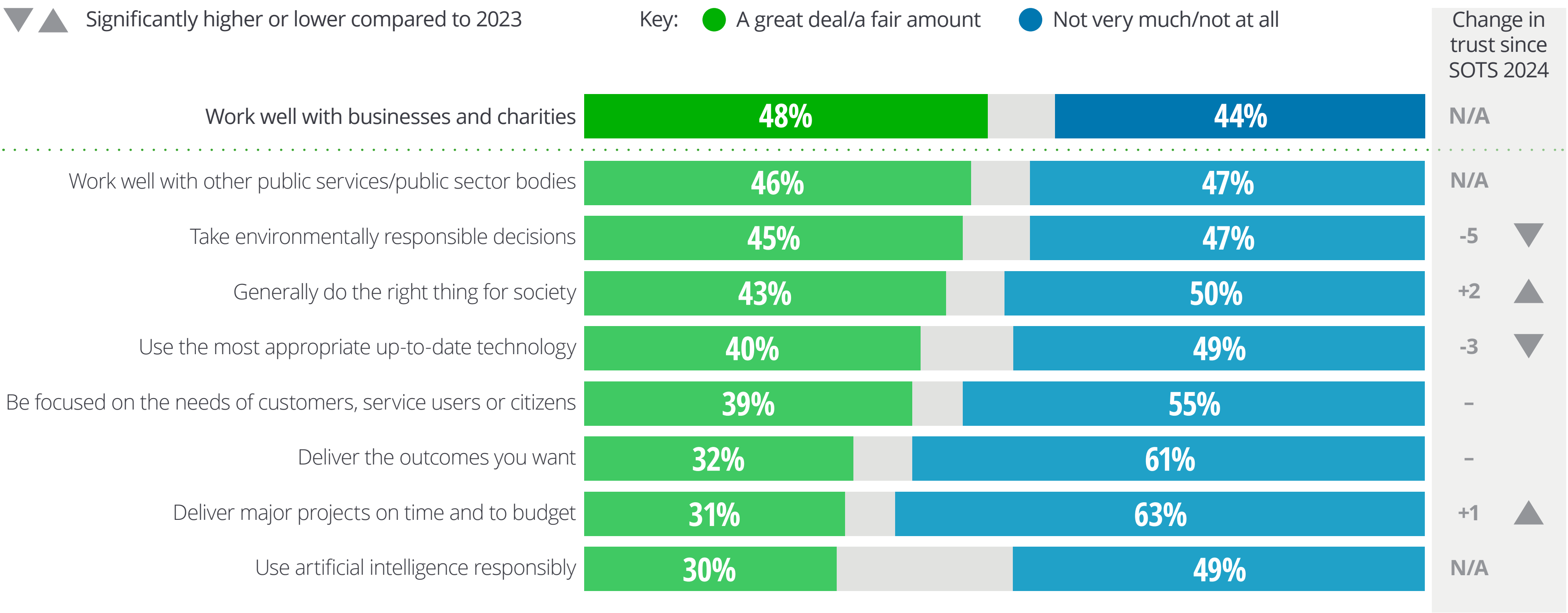
Base: 697 online adults in Wales 16-75



# Trust in the Welsh Government has remained relatively stable

Every year, our *State of the State* survey explores levels of trust in government across a range of capabilities. This year, it found a that **trust in the Welsh Government has remained relatively stable and relatively balanced,** but with notable concerns around delivery of major projects and outcomes for the public.

Q: To what extent, if at all, do you trust the Welsh Government to ...?



Base: 697 online adults in Wales 16-75

# Trust in the Welsh Government is relatively buoyant by UK Government standards

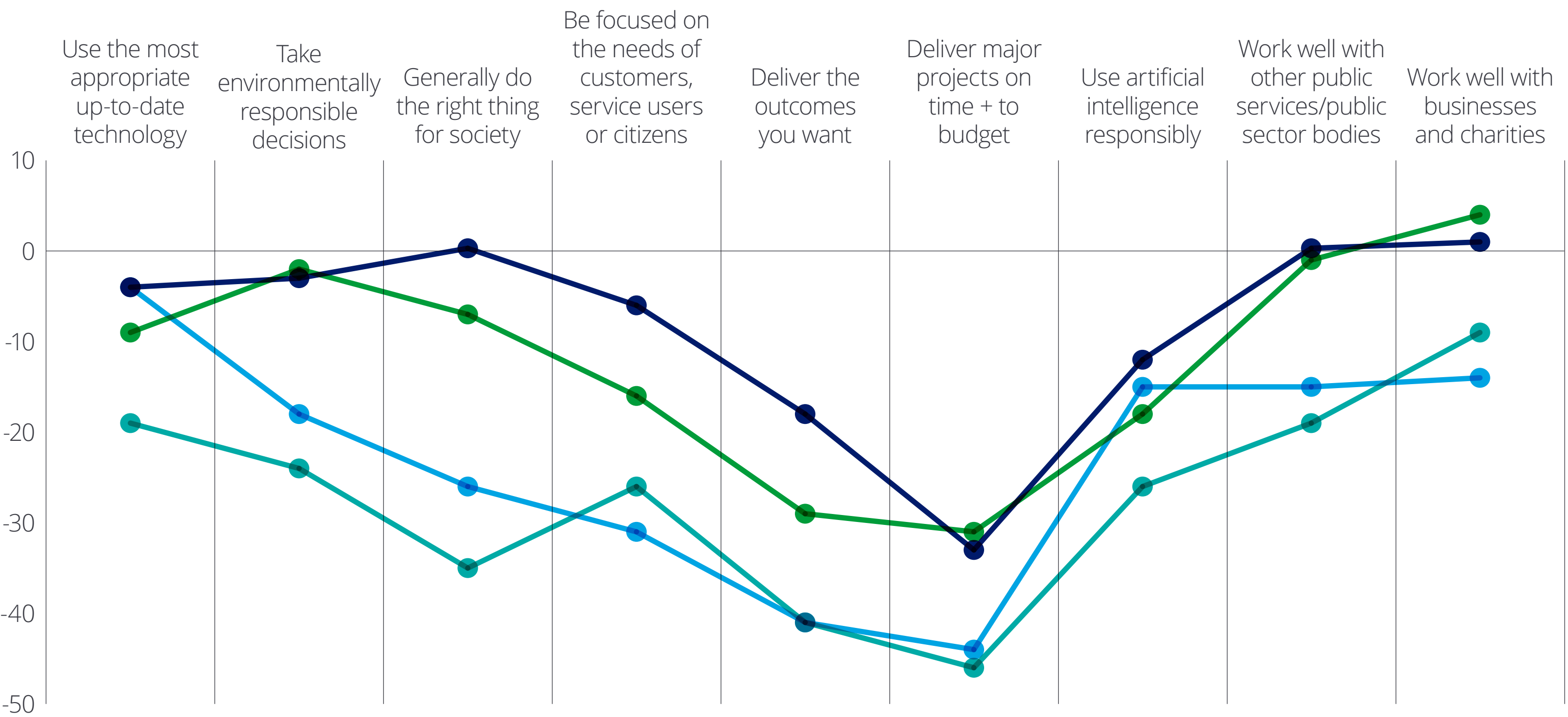
This chart shows the same data in comparison with other administrations.

Trust in the Welsh Government remains relatively buoyant by UK government standards. There is an **anomalous perception that the Welsh Government is less likely to use the most up-to-date technology** compared to the UK and Scottish Governments.



Q: To what extent, if at all, do you trust ... to ...?

Key: ● Scotland ● Wales ● UK Government ● Northern Ireland



Base: 5,721 online UK adults 16-75

Note: % Net trust (great deal/fair amount minus not very much/not at all)



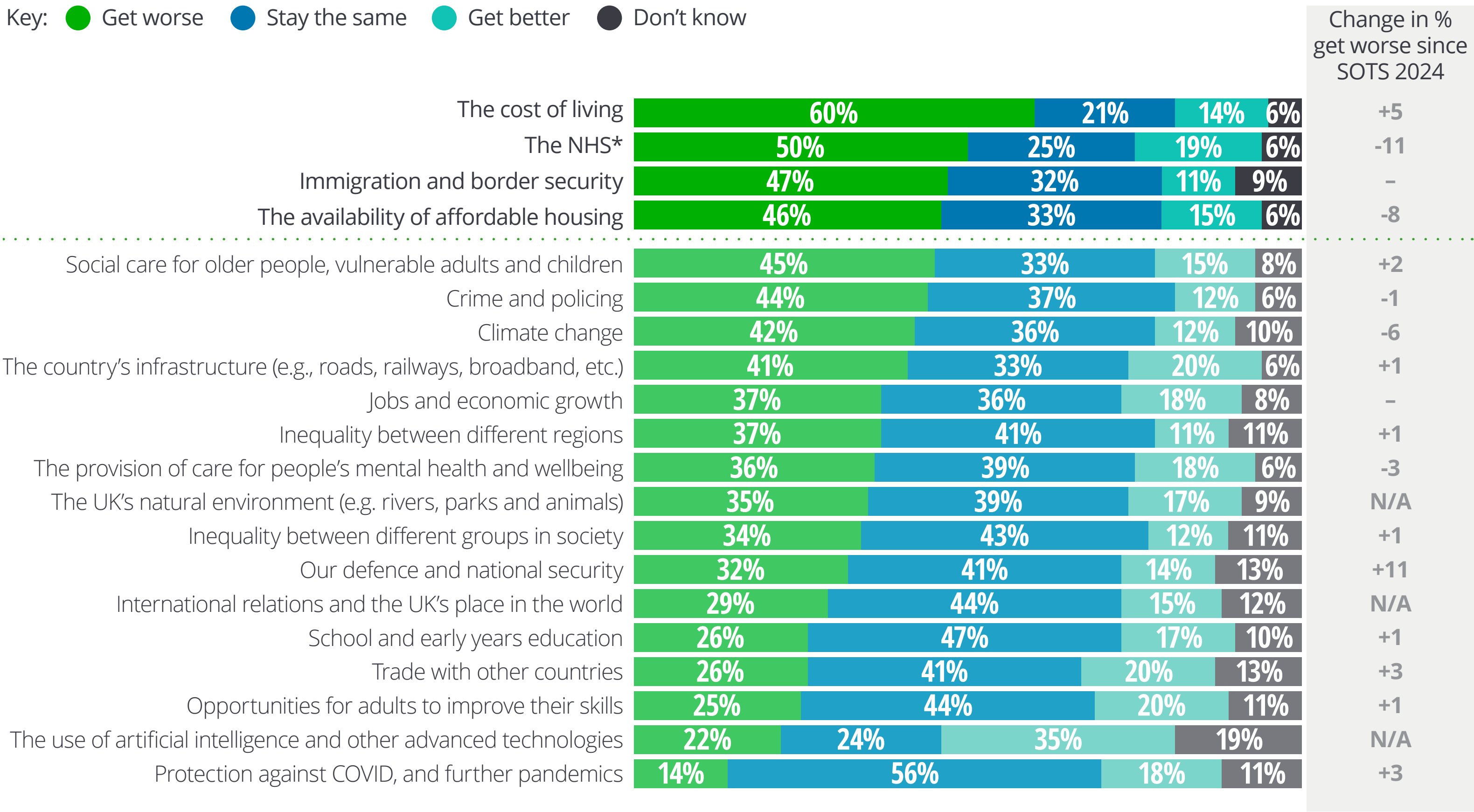
# Green shoots of positivity – but the Welsh are increasingly concerned about defence

Every year, our optimism tracker maps the levels of optimism among the public for a range of policy issues. This year's tracker finds the Welsh public – in common with the rest of the UK – **more pessimistic than optimistic.**

However, there have been some notable shifts since last year. The number of people **thinking that the NHS and housing are likely to get worse has dropped** by a statistically significant proportion. So, while the public is not optimistic about any of those areas, they are less worried than they were a year ago.

At the other end of the spectrum, worries about the **outlook for defence and national security have risen** significantly since last year.

**Q: Thinking about the next few years or so, do you think that each of the following will get better, get worse or stay about the same in the UK?**



Base: 697 online adults in Wales 16-75

\* In 2023, this option was "NHS waiting lists"

# Wales is relatively concerned for the future of the NHS, infrastructure and trade

While worries for the future of the NHS and housing appear to have rescinded, these figures are all relative.

The Welsh public are in fact more concerned for the future of the NHS, infrastructure and trade than the UK average.

The chart to the right shows the ‘net get better’ scores for each nation and highlights the statistically significant differences.

Q: Thinking about the next few years or so, do you think that each of the following will get better, get worse or stay about the same in the UK?

Significantly higher or lower than average:

	England	Scotland	Wales	Northern Ireland
The cost-of-living	-41	-41	-46	-49
Immigration and border security	-35	-26	-36	-32
Affordable housing	-31	-28	-32	-36
Crime and policing	-30	-27	-32	-31
Climate change	-29	-27	-30	-30
Social care	-28	-29	-29	-28
The NHS*	-24	-29	-30	-34
Protecting the UK's natural environment	-22	-19	-19	-12
Inequality between different groups in society	-20	-23	-22	-21
Inequality between different regions	-20	-19	-25	-24
Mental health care	-19	-28	-17	-23
Jobs and economic growth	-18	-19	-19	-19
The country's infrastructure	-16	-21	-21	-16
Our defence and national security	-13	-11	-18	-11
International relations and the UK's place in the world	-12	-10	-14	-16
School and early years education	-11	-8	-11	-9
Opportunities for adults to improve their skills	-4	-11	-4	-6
Protection against COVID/pandemics	+6	+4	+4	+9
The use of artificial intelligence and other advanced technologies	+10	+13	+13	+14
Trade with other countries	0	-6	-6	0

Notes: Net get better by nation (better minus worse)

\* In 2023, this option was “NHS waiting lists”

Base: 5,721 online UK adults 16-75, 13th-19th December 2024. Including in England (3836), Scotland (687), Wales (697) and Northern Ireland (501).



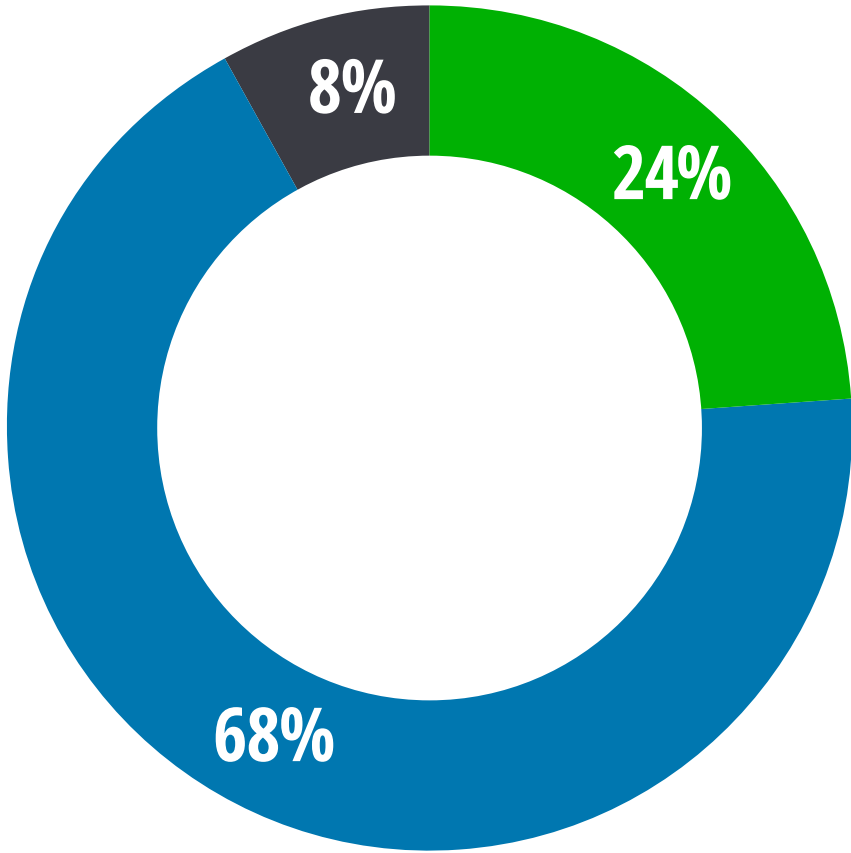
# Seven in ten say net zero will be missed in Wales

Seven in ten of the **Welsh public** are not confident that the UK will reach its target of a net zero economy by 2050, broadly equal to our findings last year. The same proportion also doubt the Welsh Government's target.



Q: How confident, if at all, are you that the UK Government will reach its target for achieving net zero emissions across the economy by 2050?

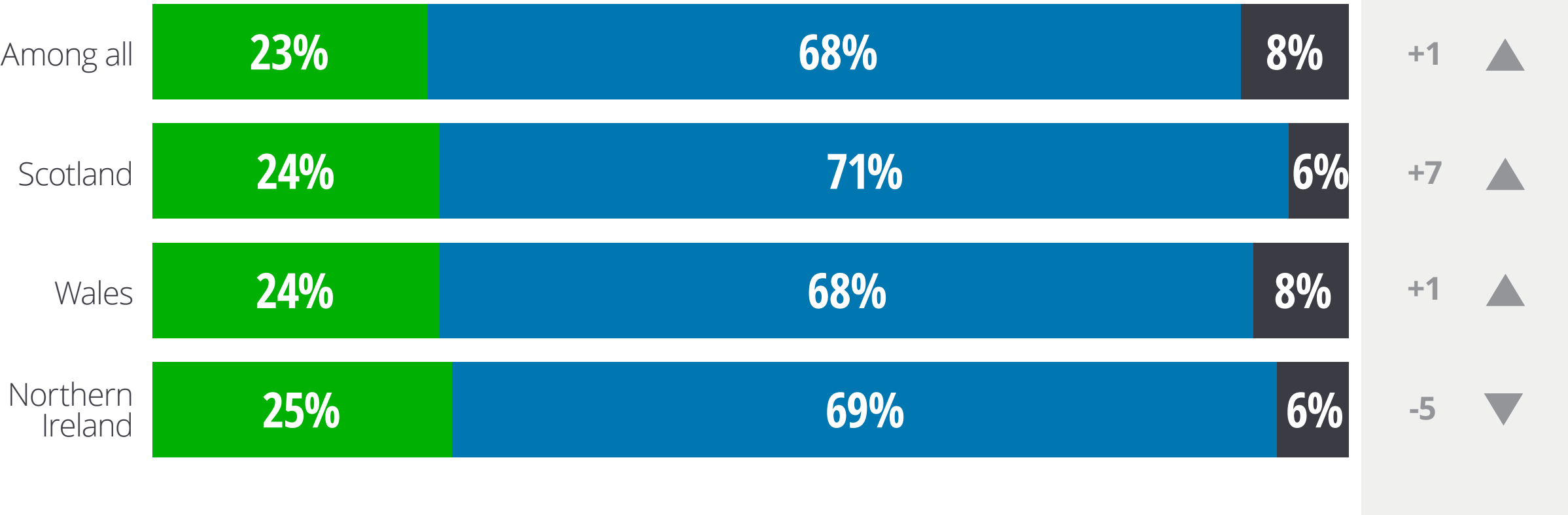
▼ ▲ Significantly higher or lower compared to 2023



Base: 697 online adults in Wales 16-75

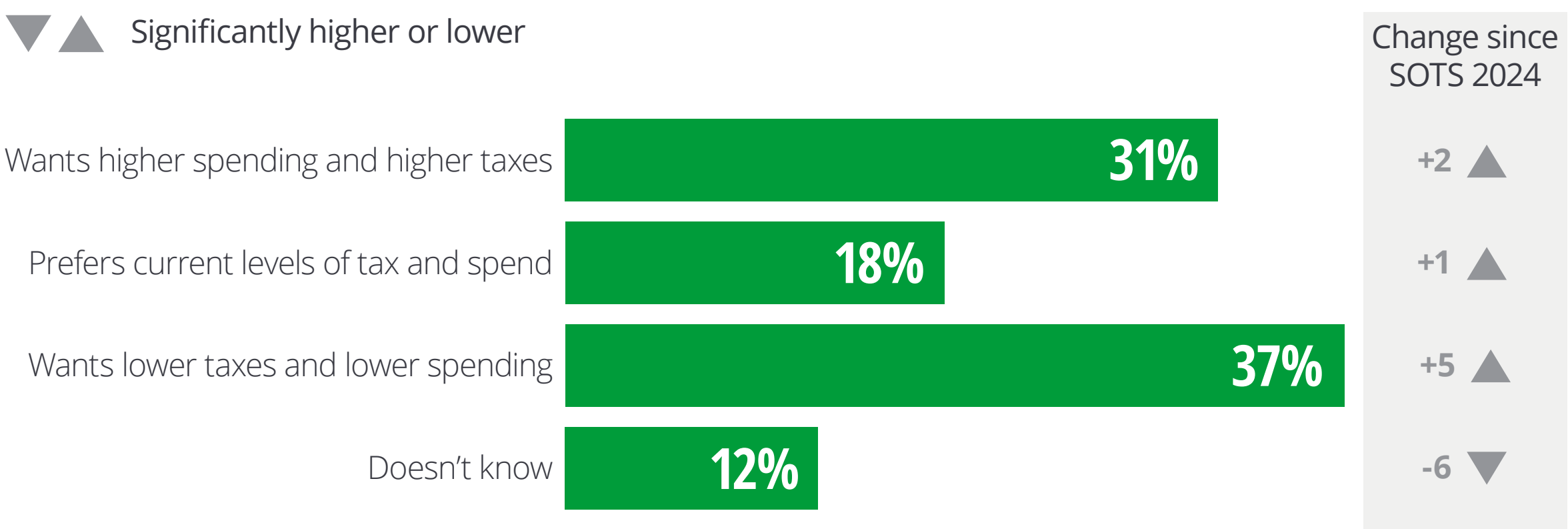
Q: How confident, if at all, are you that Scotland/Wales/Northern Ireland will reach its target for achieving net zero emissions across the economy by 2045/2050?

Key: ● Confident ● Not confident ● Don't know

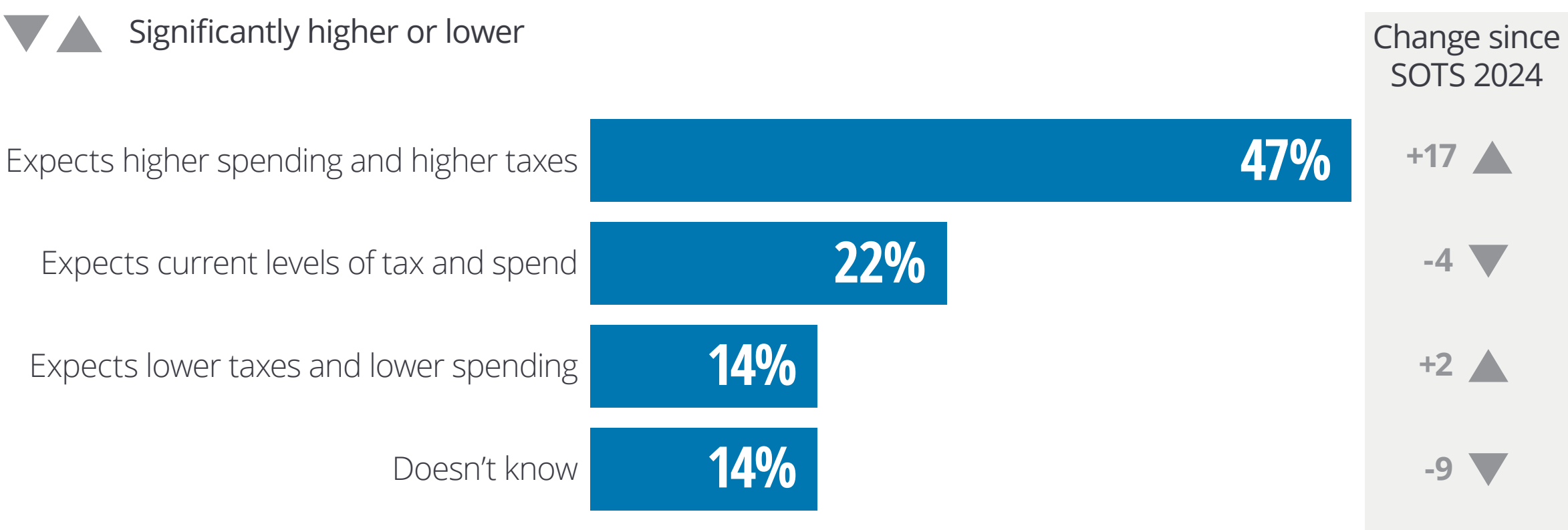


# Wales leans towards favouring lower taxes but expects the opposite

Our annual survey asks the public if they would prefer higher public spending or lower taxes. This year, our survey finds the **Welsh public split on their preference** – although lean slightly towards welcoming lower taxes and lower spending.



Whether they would prefer higher spending or lower taxes, more of the **Welsh public expect taxes to rise** in the future. The number of people expecting taxes to increases has gone up by seventeen percentage points since last year.



Base: 697 online adults in Wales 16-75

**This question in detail**

The survey asked: As you know, governments have to make decisions to set the right balance between the advantages of higher public spending and the advantages of less tax or public borrowing. Which of the following, if any, do you think **should** be UK government policy for the balance between public spending and the levels of taxation and public borrowing in the future? And which of the following, if any, do you think **will** be UK government policy for the balance between public spending and tax and/or public borrowing in the future?



# Insight from public sector leaders





# Insight from public sector leaders

For more than a decade, our *State of the State* reports have been informed by interviews with senior figures from across the public sector.

This year we interviewed more than 80 public sector leaders including politicians, senior civil servants, police leaders, council chief executives and NHS officials.

This section of *State of the State* sets out insights from our research interviews in Wales. They can be read alongside the UK report for a wider picture.



## Key takeaways



### The 2026 Senedd election is already looming large on the horizon

After decades of relative stability in Welsh politics, recent years have seen some rapid changes at the top of government. The election of a new administration in Westminster has added to that sense of change, and focused attention on the 2026 Senedd election – the first under a new set of electoral rules.



### Faith in net zero remains strong but leaders sense a lull in priority, pace and progress

Climate change remains a big issue for many leaders across the public sector but is not the priority many want it to be. Interviewees told us that relentless day-to-day pressures leave them with little bandwidth or resources to make progress on the road to net zero. At the same time, public interest – and the political urgency that comes with it – seems to have waned.



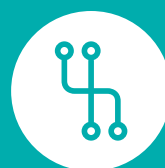
### Infrastructure must pave the road to growth

Our interviews explored public sector leaders' views on economic growth, surfacing a range of conflicting perspectives. A number of parliamentarians questioned the Welsh Government's engagement with business while council chief executives told us that Government's infrastructure spending is key.



### Tough choices but transformational opportunities await the next Welsh Government

Public sector leaders told us that tough spending choices will await the next Welsh Government. But they also argued that a fresh mandate will open up transformational opportunities in the system that the next administration can take forward.



### Local government: reorganise, reform or retrench?

Several interviewees talked about the pros and cons of local government re-organisation – but some in local government argued that the more pressing question is what to reform rather than whether to reorganise.



# The 2026 Senedd election is already looming large on the horizon

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The first requirement of any government is to know they can be replaced. **That's healthy.**

Member of the Senedd





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After decades of relative stability in Welsh politics, recent years have seen some rapid changes at the top of government.

The election of a new administration in Westminster has added to that sense of change, and focused attention on the 2026 Senedd election – the first under a new set of electoral rules.

In our interviews, leaders acknowledge that political shifts are a healthy and welcome part of public sector life. Some noted a growing sense of urgency in the Welsh Government to deliver on its commitments ahead of the next election, and especially to drive economic growth.



Westminster has a fresh five-year agenda but in Wales, we've got 12 to 18 months before the election. And the Senedd reform means **we could face a generational change.**

Senior Civil Servant



The four pillars of sustainability in Wales are economic, social, environmental and cultural, but the **balance has shifted to the economic one** since the UK election.

Director, Arms-Length Body



The Welsh Government has had a turbulent time with three first ministers after years of extreme stability. Then throw in the general election and what that means for Wales, **there's a distinct air of change.**

Senior Civil Servant



# Tough choices but transformational opportunities await the next Welsh Government



**The risk is in staying reactive.**  
You can't be strategic and get in front of issues like climate when you're permanently on the back foot.

**Council Chief Executive**





# Tough choices but transformational opportunities await the next Welsh Government

“Progress on digital is about making a decision, setting a strategy and delivering it. Sustainable funding is a huge challenge. **We’ve got to put money into reform and delivery.**

Chief Executive, Arms-Length Body

Public sector leaders told us that tough spending choices will await the next Welsh Government. But they also argued that a fresh mandate will open up transformational opportunities in the system that the next administration can take forward.

Some told us that they need more bandwidth to deliver reforms and others called for greater direction from the centre of government.

“We can’t transform, **we’re keeping the lights on.**

Director, Arms-Length Body

“The Budget gave us more money and hundreds of **millions sounds big but** do the math: half is for public sector pay awards already agreed, then we need to sort NHS waiting lists, then **there’s not much** left.

Senior Civil Servant





# Local government: reorganise, reform or retrench?



We should accept the number of local authorities we've got and make it work. If you want to reform, at least **do it for a reason, not dogma.** Will it improve services?

Chief Executive, Local Government





# Local government: reorganise, reform or retrench?

“ If the voluntary sector went on strike, Wales would grind to a halt – but maybe then government would **realise how relevant we are.** ”  
Director, Voluntary Sector

“ **Social care is the intractable problem.** I don't know what the Casey review will add to what we already know. ”  
Chief Executive, Local Government

Several interviewees talked about the pros and cons of local government re-organisation.

Perhaps the discussion has been piqued by developments over the border, but leaders across the public sector told us the question of whether to reduce the number of Welsh local authorities remains a live debate.

Some in local government argued that the more pressing question is what to reform rather than whether to reorganise. The most commonly cited suggestions for extensive reform were around social care and about better engaging the voluntary sector in local services.

“ The Welsh public sector is way too complicated. **We shouldn't have 22 local authorities** in a country of three and a half million people. That's about the same as Birmingham. ”  
Senior Civil Servant





# Infrastructure must pave the road to growth

“

Growth needs to be about supporting business – end of. But the Welsh government is a **closed door to business and entrepreneurialism.**

Member of the Senedd





# Infrastructure must pave the road to growth

“Westminster is behind the curve from us in terms of integrated transport. Our big difference is **we have a vision**, we know where we’re trying to get to and what we need to do. Across our partners, we don’t agree on everything, but **we agree on enough to move forward**.

Director, Arms-Length Body

Our interviews explored public sector leaders’ views on economic growth, surfacing a range of conflicting perspectives.

A number of parliamentarians questioned the Welsh Government’s engagement with business while council chief executives told us that Government’s infrastructure spending is key. Other leaders asked whether growth conflicted with government’s other goals, and not least its environmental commitments.

Leaders also told us about the emerging successes in Welsh transport infrastructure, driven by clarity of vision and strong partnership working.

“Welsh government has a massive growth agenda but that has the ability to conflict with the environment. **We’re still building on flood plains and not putting in defences.** Or we put in concrete defences instead of nature-based ones because it’s cheaper and quicker.

Director, Arms-Length Body

“Most local authorities subscribe to the idea that **central government investment in infrastructure will drive growth.**

Council Chief Executive





# Faith in net zero remains strong but leaders sense a lull in priority, pace and progress



We haven't got the people to put wind farms up, or work on tidal energy. **The green agenda isn't getting anywhere.**

Member of the Senedd



# Faith in net zero remains strong but leaders sense a lull in priority, pace and progress

Climate change remains a big issue for many leaders across the public sector but is not the priority many want it to be.

Interviewees told us that relentless day-to-day pressures leave them with little bandwidth or resources to make progress on the road to net zero. At the same time, public interest – and the political urgency that comes with it – seems to have waned.



**Climate is starting to drop down**

people’s agendas and other things are worrying them more, like health and Housing. Economic benefits will be slow, but all the evidence tells us that **green jobs and skills will present significant competitive advantage** in the medium-long term.

Senior Civil Servant



There are millions of pounds in investment funds and the **public sector isn’t taking advantage** of any of it.

Director, Arms-Length Body



**Net zero is not top of the list** by a long way.

Member of the Senedd



# The public sector's vision of the future from within





# The public sector's own vision for 2035

Our interviews explored how government and public service leaders want their organisations and services to look in ten years' time.

Their collective responses provide a glimpse of what government and public services could look like in 2035.

This section of *State of the State* summarises their thinking and offers a 2035 vision of the public sector from within.



## Key takeaways

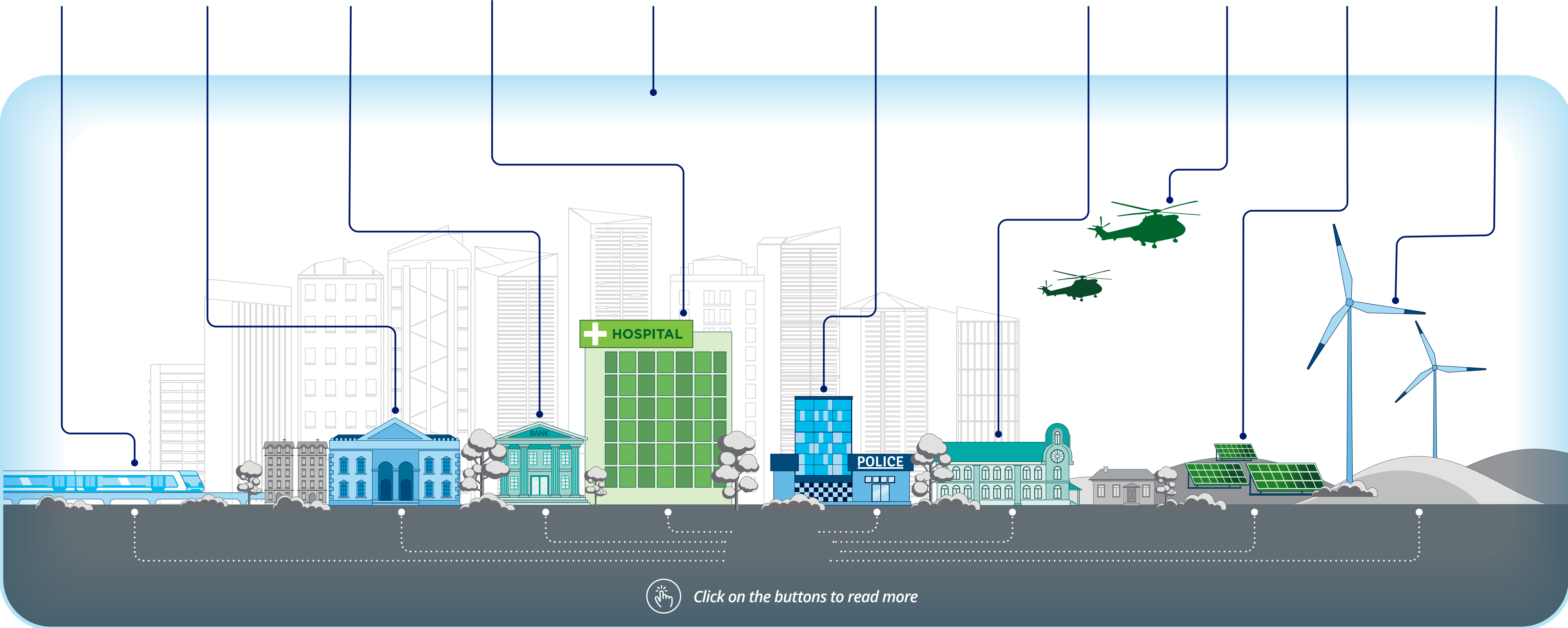
Our interviews asked leaders about their hopes for the public sector of 2035. Put together, their responses provide a glimpse into the future. Their vision is defined by four characteristics:

- 1.** Interactions with government are **frictionless** for the citizen, and technology including artificial intelligence is used to provide frontline workers with the information they need at the point of decision.
- 2.** Local **public services work collectively**, especially on preventative measures, and ensure seamless citizen pathways between them. They engage the voluntary sector as a delivery partner and co-produce services with the public.
- 3.** **Place-based** thinking will at last come of age. It will allow for a renaissance in our communities that includes integrated transport, new ways to access health services, and joined-up growth plans.
- 4.** Government **decision-making** is rooted in the long-term interest, with measurement and evaluation baked-in and commercial issues taken into account as the norm. Central government is smaller with greater clarity on roles and purpose.



# The public sector's vision for 2035

Our interviews with government and public sector leaders surfaced their own vision for 2035





# Conclusion and recommendations





# Conclusion and recommendations

## Our recommendations



Our research points to **four recommendations**:

### 1. Set out a long-term vision for the public sector and how it will improve life in Wales

Public sector leaders told us they **want to see bold reforms** that will see services more joined-up, more citizen-centric and better exploiting the potential of technology. While the Welsh Government's current plans are focused on fixing the sector's immediate challenges, our research suggests the **need for a longer-term vision for the sector.** That vision could go beyond fixing the sector's problems to providing a compelling view of what the Welsh Government and public services could look like in the future, how it could feel to work in, and what it could do for the public.

### 2. Turn up the volume on the green agenda

Our research finds the public becoming less worried about climate change – perhaps even complacent – and public sector leaders concerned that net zero targets will not be met. That suggests **a pressing need for every organisation and business engaged in net zero transition** to engage the public in the climate agenda and why it matters.



# Conclusion and recommendations

## Our recommendations

This research points to **four recommendations** (*continued*)

### 3. Grow the public sector's 'halo effect' technology successes

While commentaries often focus on the problems, the UK's public sector have **rolled out some world-leading uses of technology.** Rather than re-invent new solutions at every turn, the sector should consider how it can grow out its best examples – the projects with a halo effect – into new uses. That creates an opportunity to use proven technology successes as the vehicle for converging systems and processes across the sector. That could allow for even more **effective interoperability between services and substantial productivity gains** if multiple institutions use the same digital systems. Key to getting this right would be a clear recognition of the proven benefits and a willingness for government to be directive across the public sector.

### 4. Provide regular figures on the 'public sector gap' the funding pressures on public services.

Our survey shows the public understand **the funding pressures on public services.** That view is informed by regular updates on the state of the public finances and budget settlements across the public sector. What's missing is a view on the gap between what those funding settlements can achieve versus the demands on them – like the number of prison spaces available and the number needed.

**Data and transparency on that gap could help the public understand the trade-offs** and how the sector would need to reduce demand (in this case, reduce prisoner numbers), improve productivity (make better use of prison capacity) or access additional funding (build more prisons) to close it.





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