

ISLE OF ANGLESEY COUNTY COUNCIL	
COMMITTEE :	Partnership and Regeneration Scrutiny Committee
DATE:	14 February 2017
SUBJECT:	North Wales Economic Ambition Board (NWEAB) – Regional Skills and Employment Plan
PORTFOLIO HOLDER(S):	Cllr. Richard Dew
HEAD OF SERVICE :	Mr Dylan J Williams
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1.0 Purpose

- 1.1 To update members on progress to date in delivering the **North Wales Economic Ambition Board (NWEAB) Employment and Skills Plan** on the Island, and how provision is responding to the needs of existing and future employers.

2.0 Introduction

- 2.1 The NWEAB was established to better co-ordinate strategic economic development activity on a regional basis in response to the pressures on public finances. The regional co-ordination and delivery of employment and skills programmes is one of the key priority areas for the NWEAB. Ensuring a better alignment between skills supply and skills demand is fundamental to sustaining and growing the regional economy.
- 2.2 The Skills and Employment Workstream of the NWEAB has been adopted and recognised by the Welsh Government as one of its three Regional Skills Partnerships (RSPs) across Wales. Delivering co-ordination and support at a local and regional level, the Skills & Employment workstream in its official capacity as the RSP for North Wales compliments and aligns to the other workstreams of the NWEAB - these include growing our supply chains; further investment in our transport and infrastructure; the opportunities for greater cross-border working and collaboration; and the promotion of further inward investment and expansion.

2.3 Working as part of a ‘**Team North Wales**’ (with partners from Local Government, Further Education, Higher Education, DWP and the Private Sector), the collective vision is for a confident, cohesive region with sustainable economic growth, capitalising on the success of high value economic sectors and its connection to the economies of the Northern Powerhouse and Ireland.

3.0 Regional Employment and Skills Plan

3.1 The Regional Skills & Employment Plan was formally adopted by the NWEAB in September 2016 prior to its submission to Welsh Government. It aims to improve and upgrade the region’s skills base and provide employment growth (see Annex A). Over the next ten years, this will be achieved by improving the supply of advanced skills in the high value economic clusters, whilst also tackling worklessness through the delivery of integrated programmes that focus on the individual’s needs and circumstances.

3.2 Employers in the region will need to be further supported to drive skills provision that responds to their needs, with the education system at all levels becoming more demand-led, reflecting the priorities of employers and growth. Those seeking work need the skills to access sustainable employment, whilst those already in work need to be further supported to develop their potential so that we remain competitive as a region.

3.3 The work of partners in collaboration regionally, supported by the NWEAB Skills Workstream has demonstrated that existing regional working to support regional delivery has been further enhanced and developed, to the benefit of participants, employers, and providers collectively. Some of the key activity to date includes the development of regional focused projects which offer participants a greater depth of resources from across the region, compared to previous projects.

3.4 The development of a clear pathway of projects that supports skills across the demographics and demands of the region, is a first for North Wales, and will aid participants on Anglesey in its progression to upskill and create sustainable opportunities. These projects have for the most part targeted European Funding support through the ESF Structural Funding route – key projects are outlined in Table A.

3.5 Given the implications of Brexit, the NWEAB sought assurance from Welsh Government and UK Government that the funding for these projects would be underwritten. These assurances were given prior to Christmas and therefore it appears likely that the level of provision afforded through these projects will be in place until at least 2020. The future of similar projects post-2020 is unclear and will be the subject of negotiations over the coming years on what any replacement Regional Development Policy will look like.

4.0 Employment and Skills on Anglesey

- 4.1 Given the major developments linked to the Energy Island Programme; the needs of the Island's traditional sectors e.g. tourism & hospitality; and the need to reduce economic inactivity - there is a special case for co-ordinating employment and skills programmes on a local and regional basis to maximise the positive impacts locally. Ensuring competitive people, equipped with the right skills to undertake the future jobs within the energy sector (and across its supply chains) is essential.
- 4.2 An analysis of the projected employment opportunities to be generated over the next decade have concluded that the gap between skills supply and skills demand will grow exponentially unless targeted interventions are deployed to remedy the situation. This is a key challenge for local and regional stakeholders – and requires a collaborative approach between the public and private sectors.
- 4.3 In relation to the proposed Nuclear New Build at Wylfa, a partnership agreement is in place between Grwp Llandrillo Menai (GLLM) and Horizon Nuclear Power (HNP) to align the training provision with the future demand. Significant investment is planned on the Coleg Menai Campus, transforming it into a Centre of Excellence for Engineering and Technology.
- 4.4 A key project which the IACC and other organisations have been developing in collaboration is the development of an Employment and Skills Brokerage that will respond to the labour demands of Wylfa Newydd. Key partners include Horizon Nuclear Power, Department for Work and Pensions (DWP), Grwp Llandrillo Menai and the NWEAB. The aim is to ensure there is labour and skills match between supply and demand across Anglesey and North Wales to ensure people can take full advantage of the opportunities

5.0 Recommendation

- 4.1 That the Committee support the recommendations made within the Regional Skills & Employment Plan to support the supply of skills needed for future economic growth on Anglesey and North Wales.

APPENDICES
Appendix A: NWEAB Regional Employment and Skills Plan

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Job Title: Economic Development Manager

Date: 30 January 2017

TABLE A: EU FUNDED SKILLS & EMPLOYMENT PROJECTS BENEFITING ANGLESEY AND NORTH WALES

Project Title	Project Description	EU Funding Source	Key Benefits
TRAC NEETs Programme (11-24)	A programme of targeted interventions to support people aged 11-24 disengaging with education, and at risk of becoming NEET (within the school setting). ASPIRE will improve the attainment and skill levels of young people, providing a supportive environment for learning, and the provision of an alternative engaging curriculum.	ESF Priority 3	<ul style="list-style-type: none"> • Reducing the number of young people who are or at risk of becoming NEET; • Increasing the options for young people by enhancing their career prospects • Reducing out-migration of young people from Anglesey;
AD-TRAC	Follows on from TRAC11-24 and supports those aged 16-24 who may still need support to address the risk of becoming NEET, in addition to those who may already be NEET	ESF Priority 3	<ul style="list-style-type: none"> • Ensure targeted provision and clear career pathways • Better alignment between skills demand and skills supply • Increased engagement between academia and business • Improved employability skills
OPUS Economic Inactivity Programme	Project aimed at addressing economic inactivity and worklessness through a provision of targeted interventions to increase confidence and employability skills.	ESF Priority 2	<ul style="list-style-type: none"> • Increase in confidence, wellbeing and participation • Appropriate support to access suitable training opportunities. • Contribute towards breaking the cycle of poverty / child poverty
Support for Employers and Employees (SEE)	A collaborative project by both Grwp Llandrillo Menai and Coleg Cambria to support the current workforce within businesses to upskill and remain competitive.	ESF Priority 1	<ul style="list-style-type: none"> • Develop a competitive labour market • Reduce mismatch between skills supply and demand • Develop competitive businesses
North Wales Business Academy	A collaborative project between both Universities and both FE Colleges across the region, to help individuals and employers upskill and improve their opportunities focused from the Level 4 upwards (Degree equivalent)	ESF Priority 1	<ul style="list-style-type: none"> • Increased leadership skills within local SMEs • Develop competitive business base
STEM Gogledd Cymru	Development of a progressive STEM Learning/Career Pathway programme which will facilitate clear progression routes aligned with future career opportunities in the North Wales economy.	ESF Priority 3	<ul style="list-style-type: none"> • Increase in uptake of STEM courses at secondary level • Increased attainment of STEM subjects • Enhanced skills pipeline to meet future needs of regional economy

NORTH WALES REGIONAL SKILLS & EMPLOYMENT PLAN





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The Skills and Employment workstream of the North Wales Economic Ambition Board (NWEAB) has been adopted and recognised by the Welsh Government as one of its three Regional Skills Partnerships (RSPs) across Wales.

Delivering coordination and support at a local and regional level, the Skills & Employment workstream in its official capacity as the RSP for North Wales compliments and aligns to the other workstreams of the NWEAB. Working as part of a 'Team North Wales' approach, the collective vision is for a confident, cohesive region with sustainable economic growth, capitalising on the success of high value economic sectors and its connection to the economies of the Northern Powerhouse and Ireland.



Our aim is to improve and upgrade the region's skills base and provide employment growth, focusing particularly on improving the supply of advanced skills in the high value economic clusters and tackling worklessness. Employers in the region need to be supported to drive skills provision that responds to their needs, with our education system becoming more demand-led, and reflecting the priorities of employers and growth sectors in the curriculum.

Working with partners from the private and public sector, we continue to collectively aim towards delivering an effective and vibrant skills approach that inspires learners of all ages, and through our regional providers, deliver excellent quality learning provision and environments that responds to current and future economic needs.

Skills and employment is a complimentary and contributory factor to the other workstream priorities of the region through the work of the North Wales Economic Ambition Board. These include the importance of opportunities for our supply chains; the need for further investment in our transport and infrastructure; the opportunities for greater cross-border working and collaboration via bodies such as the Northern Powerhouse, Local Enterprise Partnerships (LEPs) and the Mersey Dee Alliance; and the promotion of further inward investment and expansion to the region, building on our qualities and diversity.

"The North Wales regional economy and labour market is inextricably linked to that of Cheshire and the Wirral, and it's excellent to see this reality reflected in the Regional Skills & Employment Plan, with the recommendation of a cross-border careers skills manifesto. Now more than ever, we need to ensure that our children and students, are given robust and practical advice on the opportunities and career paths throughout our cross border regional economy. Careers advice provision, needs to match the jobs demand and opportunities footprint of our North Wales & Mersey Dee economy."

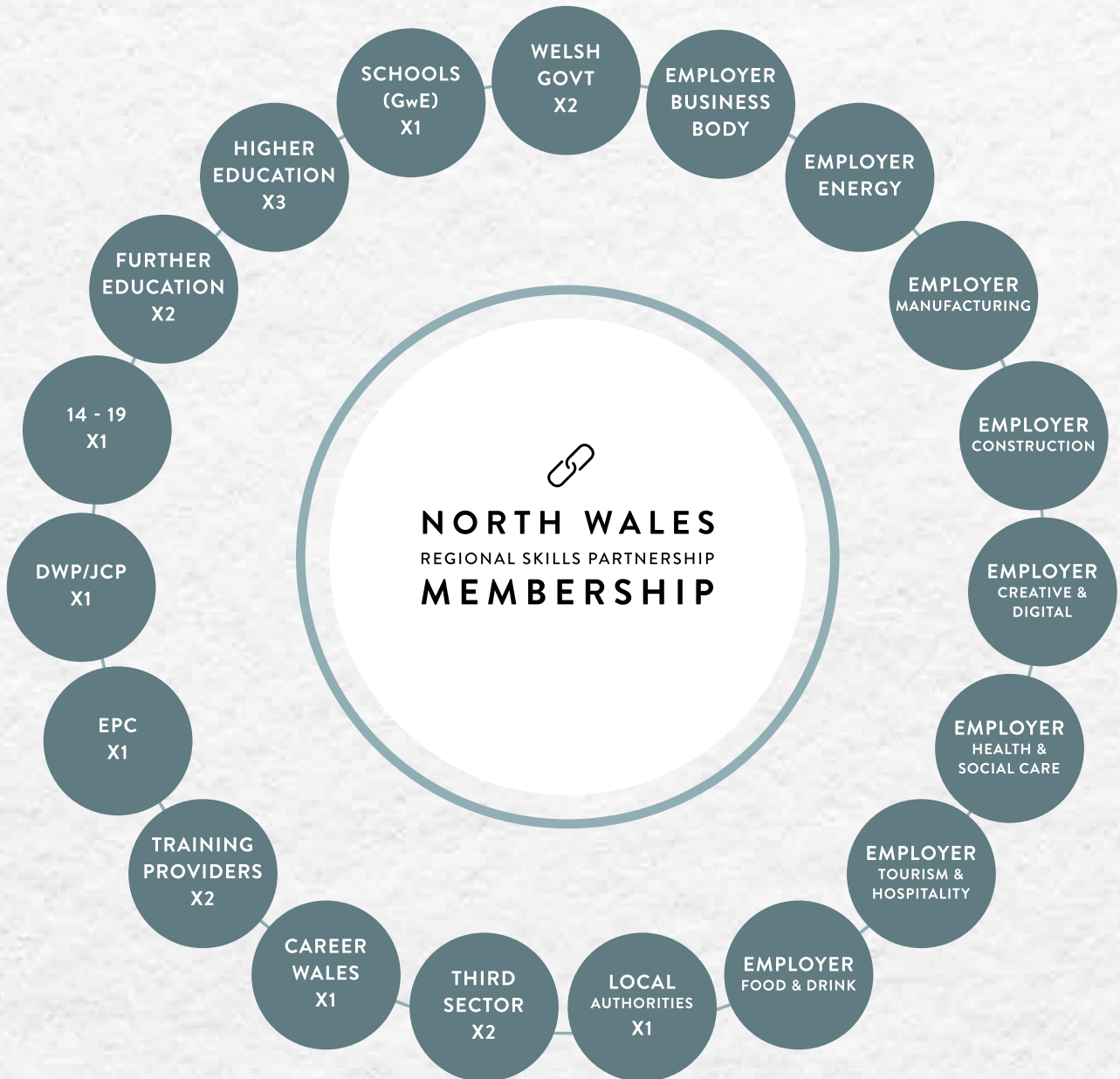


IN ASSOCIATION WITH

OVERVIEW OF NORTH WALES




north wales economic ambition board
bwrdd uchelgais economaidd gogledd cymru





Our aim from this Regional Skills & Employment Plan, aligned with the broader regional economic driven agenda and proposed Growth Deal for North Wales, is to improve and upgrade the region’s skills base and provide employment growth.

Over the next ten years, this will be achieved by focusing particularly on improving the supply of advanced skills in the high value economic clusters, whilst also tackling worklessness through the development and delivery of integrated and co-ordinated programmes that will focus specifically on the individual’s needs and circumstances.

Employers in the region will need to be further supported to drive skills provision that responds to their needs, with our education system at all levels becoming more demand-led, and reflecting the priorities of employers and growth sectors within the curriculum.

We need to ensure that those seeking work have the skills to access sustainable employment, whilst those already in work need to be further supported to develop their potential so that we remain competitive as a region.

REGIONAL CHALLENGES FOR SKILLS & EMPLOYMENT

Addressing lack of succession planning by employers combined with ageing workforce in key sectors	Retaining young people into sustainable employment within the region on completion of their studies	Developing an adaptable regional skills brokerage model based on existing success delivered at North Wales Prison
Increasing the uptake and promotion of STEM related subjects & skills aligned to employer demands	Delivering regional skills solutions for transformative projects alongside promotion of local proximity	Supporting sustainable development and innovation in our growth sectors to provide attractive career pathways

Our previous forecast in the 2015 Regional Skills Plan of 40,000 potential new jobs over the next ten years remains unchanged. However, delays in the publicising of skill requirements and job role expectations from our key transformational and infrastructure projects within the region continues to be a challenge for partners to effectively plan the skills training and support needed to meet demands and assist publicity and promotion of opportunities & expectations.

EXECUTIVE SUMMARY

REGIONAL SKILLS PARTNERSHIP DEVELOPMENTS SINCE 2015...



The engagement and support of providers and employers has been fundamental to the work delivered above since the production of the last Regional Skills & Employment Plan in 2015.

The primary targets listed within the 2015 Plan concerned the development and delivery of a suite of regional skills projects that would be successful in achievement and award of European funding.

Of the five projects developed, three have already been awarded approximately £40million, with a further two projects projected to be collectively awarded in excess of a further £10million for the region.

The work of partners in collaboration regionally, supported by the NWEAB Skills workstream has demonstrated that existing regional working to support regional delivery has been further enhanced and developed, to the benefit of participants, employers, and providers collectively.



PRIORITY SECTORS



ENERGY & ENVIRONMENT



ADVANCED MANUFACTURING & MATERIALS



CONSTRUCTION

GROWTH SECTORS



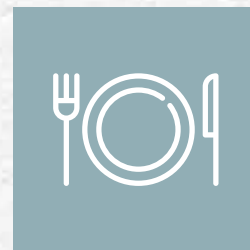
CREATIVE & DIGITAL



HEALTH & SOCIAL CARE



TOURISM & HOSPITALITY



FOOD & DRINK MANUFACTURING

Further details within the Regional Skills & Employment Plan notes that the cross border mobility of skills is an important component for future skills and employment considerations.

The east - west axis is a key component of the North Wales economy and labour market, and therefore administrative boundaries will not be a barrier, with the economy of North Wales inextricably linked and closely aligned to North West of England.

The ten recommendations within the Regional Skills & Employment Plan are built on the demands of our regional skills agenda, and its capacity to support the supply of skills needed for our future economic growth in North Wales.

The primary drivers for our recommendations in the Plan are therefore based on specific headline skills and employment components that support a growth vision and strategy for the economy of North Wales:

Delivery of applicable resources within a regional strategy that increases the uptake of STEM subjects to support our key growth sectors across North Wales.

Identify skills demands and work with providers in HE FE and the third sector to support developing and upskilling the regional workforce.

Continue to develop initiatives and projects to promote a skills pipeline across education and training providers in support of regional economic priorities.

Deliver specific projects and programmes intended to support our key growth key sectors via use and promotion of specific centers of excellence and hubs.

Develop a cross-border skills manifesto centres around the funding of a cross-border careers advice service to support the skills provision pipeline.

The suite of ten recommendations within the Regional Skills & Employment Plan for 2016 continues to build upon the achievements within the 2015 Plan, and help form the foundations of the aspirations for delivery relating to skills and employment as part of a confident, cohesive region with sustainable economic growth, that capitalises on the success of high value economic sectors, and its connection to the economies of the Northern Powerhouse and Ireland.

SUMMARY OF RECOMENDATIONS

A summary of the ten recommendations proposed within the Plan are provided below. Further details on each of the ten recommendations along with actions and milestones, are contained within the main document.

Deliver the necessary facilities and expertise within the region to create aspiration, and equip local people with the knowledge, skills and aptitudes so that they can gain sustainable employment within our key and growth sectors

Develop a regional approach to skills and employment brokerage, that can be added to with bespoke needs and requirements as driven by specific transformational projects

Develop a “North Wales Toolkit of Employability Skills” in response to agreed labour market expectations and future employer demands, with the award of an accredited and employer supported, single regional certificate

Develop a cross-border careers skills manifesto built around a single cross-border careers agency to promote the fluidity of skills and expertise in relation to both our labour markets and those who are studying and learning

Develop a North Wales approach to STEM that will help communicate, inspire and promote equality of opportunity, whilst clearly reflecting and supporting the needs of employers, learners, and providers at all levels

Continue to identify appropriate methods to support Welsh Language skills within the workplace and also wider engagement of the views of employers on the skills agenda across North Wales



OVERVIEW OF NORTH WALES

697,000

POPULATION ACROSS SIX COUNTRIES

£20bn

POTENTIAL SPEND ON PROJECTS

40,000

ESTIMATED NEW JOBS OVER 10 YEARS

Based on the potential impact of projects such as the current North Wales Prison (HMP Berwyn) at Wrexham; the future potential of Wylfa Newydd in Anglesey; and the continued expansion and development of existing employers across the region - primarily those within our three Enterprise Zones, and key business sites such as Wrexham Industrial Estate - we have the potential via our skilled current and future labour market, to help create aspiration, and improve productivity, competitiveness and growth across North Wales.

The potential skills and employment benefits from an estimated £20billion spend on key projects that in addition to those listed above, also include the Orthios Eco Park, Parc Adfer Energy Recovery Facility, and further expansion of the Northern Gateway, will all mean both opportunities and challenges for local businesses and the labour market.

For all major projects to succeed in North Wales, we need an appropriately skilled and qualified workforce in the region prior to their commencement, and sustainable solutions will need to be developed to help ensure that displacement issues on a sectoral and skills basis are effectively planned to meet regional and local needs. Failure to deliver these, will result in potential employment opportunities for these key opportunities being taken up by skills and labour from outside of North Wales, and have a negative effect on our regional economy.

66.82%

REGISTERED BUSINESSES EMPLOY UP TO 4 PEOPLE

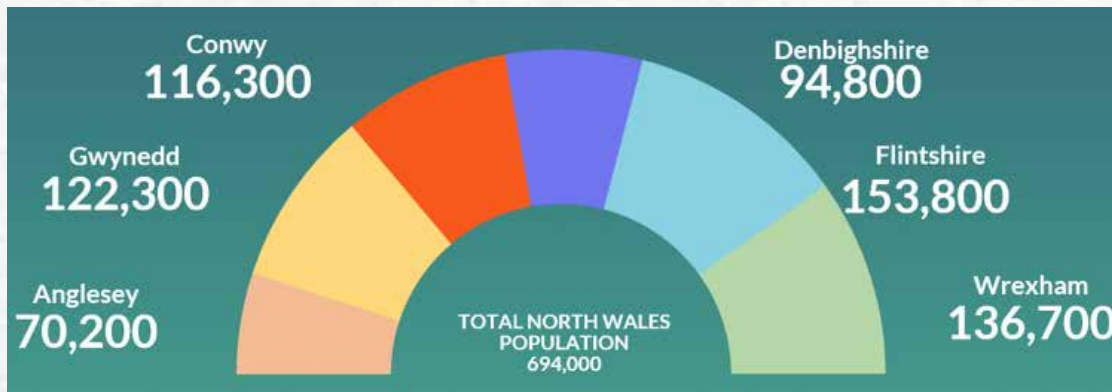
2.78%

REGISTERED BUSINESSES EMPLOY 50+ PEOPLE

29,875

VAT REGISTERED BUSINESSES ACROSS NORTH WALES

Whilst there are 29,875 VAT registered businesses within the region, North Wales in total is home to 58,100 enterprises, and therefore reskilling of the current workforce should be viewed as equally critical alongside the attraction of young new entrants to the labour market if we are to remain collectively competitive. The challenge for the region is how do we make education relevant to the real needs of workers in our current labour market, while continuing to develop those individuals yet to enter the economy.



With the current population of 694,000 across North Wales, whilst there is clear depth of skills across many sectors, there are challenges ahead facing the region.

The current working age population (aged 16-64) has already seen natural shrinkage from a figure of 427,000 in 2008 (62.5% of total population), to the current 418,000 (60.2%); whilst the older population aged 65 plus, has seen an increase in the same period from 132,100 (19.3% of total population), to the current 152,100 (21.9%).

The increase in the average age of the working population requires replacement demand, to both fill and meet current needs of employers and the labour market, but also to address and service the new employment opportunities from new flagship regional projects, in addition to the continued expansion within our growth sectors across North Wales.

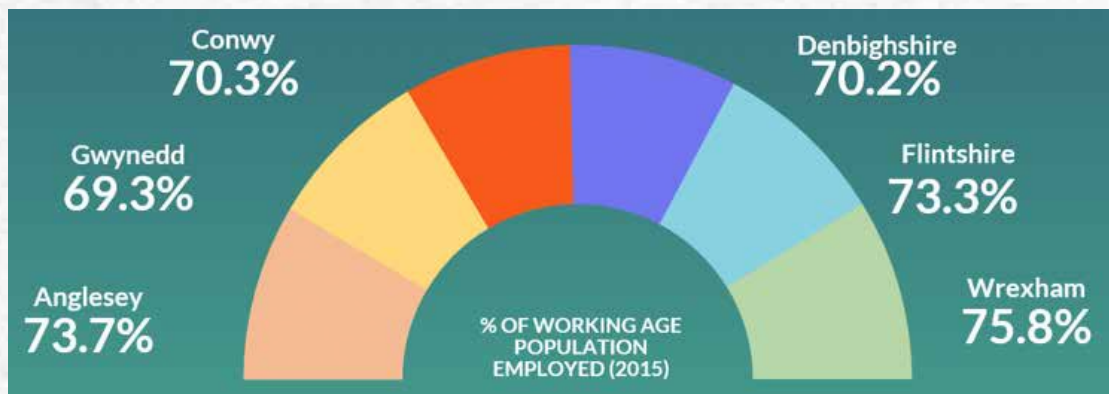


A risk to the labour market for North Wales is a combination of a naturally aging population, lack of succession planning by employers, increasing inward migration of retirees, and the challenges around retention of young people on completion of their studies

The Regional Skills & Employment Plan for North Wales in 2015 identified the potential for upto 40,000 new jobs to be created across the region during the next 5-10 years, and this estimate remains unchanged in 2016.

If we as a region are to deliver the skills within the region to successfully address these employment opportunities, further work will need to be undertaken during the next 2-3 years in upskilling the current workforce in North Wales to support both key flagship projects and the wider supply chains, in addition to potential displacement issues. Supporting closer ties between employers and our education providers will be key to this, in addressing any potential risks that our region does not have the appropriate skills base to encourage further investment from business.

OVERVIEW OF NORTH WALES



North Wales should build and exploit its skills strengths to further cement and expand its employment opportunities and continue to build the proportions of the working age population who are employed.

The region has existing strengths in manufacturing, and whilst this is concentrated in the North East around the Deeside Enterprise Zone, there are instances of smaller employers within this key sector across all of North Wales.

There are also strengths in the region within the energy sector, in addition to those companies and employers within distribution, transport, and communications.

The growth sectors identified within the previous 2015 Plan continue to remain consistent, with forecast increases in employment opportunities within Health & Care; Creative & Digital; Tourism & Hospitality; and Food & Drink Manufacturing.

In addition to their own respective growth forecasts with improved skills and employment opportunities, each of the growth sectors identified will be impacted upon by the transformational projects such as Wylfa Newydd. Although a project primarily focused on the nuclear and energy sector, its potential for additional impact on associated wider growth sectors within the supply chains across the region cannot be underestimated.

A growing concern is whether the construction industry will be able to meet the demands of the transformational projects and other infrastructure projects being planned. Without clear timings and volumes of roles and skills requirements from developers it is difficult to effectively plan and promote skills developments and opportunities within the sector.

Further delays in the publicising and sharing of skills requirements and job role expectations from our key transformational and infrastructure projects within the region, may harm the construction sector in North Wales in relation to its skills capacity and competitiveness to respond effectively.



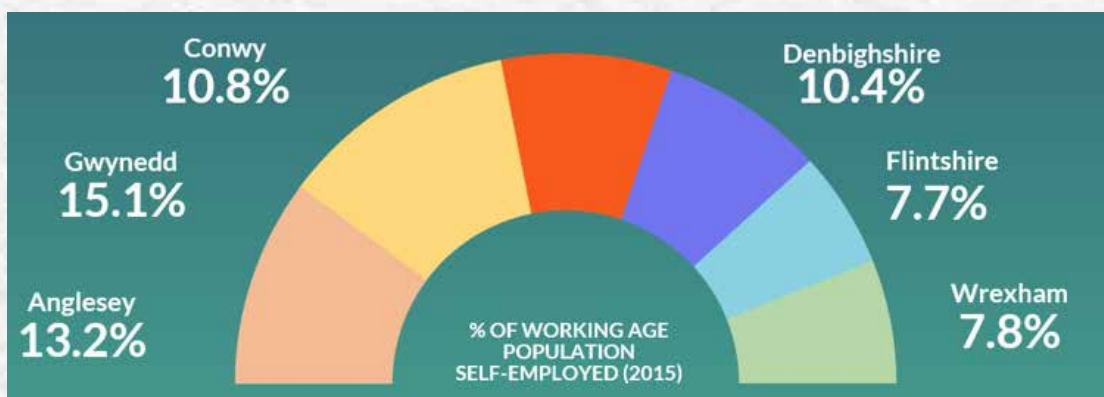
Both FE colleges within the region will find it increasingly challenging to attract further students to their well-established construction and built environment related courses to meet future opportunities. This is a result of both students, peers, and their parents being resistant to move forward until they too see confirmation of opportunities from proposed projects becoming a reality.

The information required being made available during 2016 will greatly assist all appropriate future workforce development interventions for the construction sector, that will aid providers and sector employer representative bodies to tailor skills training and provision to clear timetables. This will greatly contribute to the development of higher level skills, in addition to apprenticeships at all levels, including greater promotion of higher level apprenticeships where applicable and required.

Apprenticeships have been a key component in the business development of companies such as TATA Steel in Shotton, whose 700 workforce supplied the steel for the 87 floors during construction of the Shard in London; cementing Shotton as one of the most advanced and profitable of all TATA's current UK sites.



The bilingual nature of many within our workforce in North Wales is identified as a positive aspect, that other regions cannot match. For employers this additional skill to work within two or more languages is increasingly seen as an asset which can be marketed internally and externally to improve the business. Many of our smaller micro businesses and entrepreneurs promote the use of Welsh within their daily business activities.



OVERVIEW OF NORTH WALES

Entrepreneurship and self-employment continues to play a major factor within the economy of North Wales, with counties such as Anglesey and Gwynedd both seeing continued increases year on year. This contrasts with Conwy and Denbighshire who have seen a small decrease from 2014 to 2015, yet the creation of new businesses provide the region with further skills and employment opportunities, and increasing support from education and training providers will be critical to help their sustainability and development in the longer term.

The diversification of skills within traditional sectors such as agriculture continues to be a key contributory factor to a growth in entrepreneurship, alongside those individuals with skills at the other end of the spectrum within the creative and digital sector.

Whilst there has been a decrease from 2014-15 in the percentage of females within the region who are becoming self-employed, the figure has increased by 0.1% (+200) for males.

The risk for the region with the large proportion of micro businesses (66.82%) is that these businesses will face the most significant challenges in releasing staff for skills training and development, and will find it increasingly difficult to successfully backfill if they lose staff to major transformational projects. Promotion of access to apprenticeships and traineeships with micro businesses will be a key positive moving forward to help address these challenges.

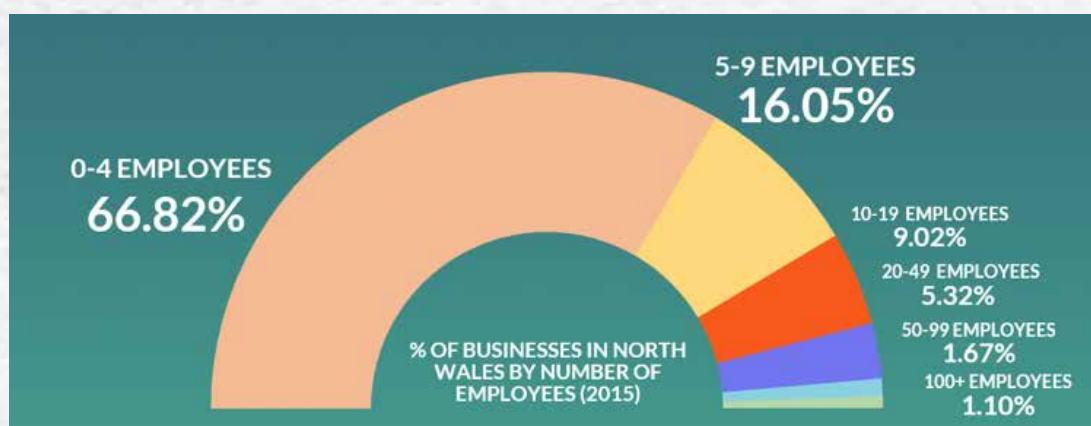
Organisations such as the Federation of Small Businesses (FSB) working in North Wales via its members within the region, highlight the greater support they feel is needed to assist micro businesses and SME's about the lifecycle of their businesses with greater assistance for succession planning and exit strategies, rather than purely growth.

5.9%

OF WORKING AGE
FEMALES ARE
SELF-EMPLOYED

15%

OF WORKING AGE
MALES ARE
SELF-EMPLOYED





The companies employing the larger number of employees may only comprise a small number of the total number of employers within the region, but their value is considerable to the wider supply chains, and further skills developments and opportunities in collaboration with education providers within the region.

However, there is a need to help promote careers opportunities within smaller businesses across the region, and that high achievers coming out of education should also be encouraged to consider career pathways in smaller businesses alongside the more obvious benefits of our larger companies.



The mobility of skills and the labour market within North Wales continues to develop, and this mobility is likely to further increase with further employment opportunities resulting from regional transformational projects. Within the region, people will travel up to 90 minutes to access well-paid employment opportunities.

We already see the mobility of skills and the labour market to key employment clusters such as Wrexham Industrial Estate and the Deeside Enterprise Zone, and also for previously long-term sites such as Trawsfynydd and Wylfa. The retention and development of highly skilled staff from these two sites particularly following decommissioning, continues to be a priority for the region.

Recently we have seen the new North Wales Prison Project at Wrexham attract skilled trades from across North Wales, with personnel from Anglesey, Gwynedd and Conwy travelling to work on-site, due to the well-paid opportunities this project (which will employ upto 800 construction staff during 2016), can offer to the region.

Transport and infrastructure development proposals will be key to improved access for skills and labour opportunities within the region, and this connectivity will be further evidenced as a key feature within any proposed North Wales Growth Bid.

£35bn

IS VALUE OF
CROSS-BORDER
ECONOMY ON M56-A55
CORRIDOR

Improvements including the electrification of the North Wales rail network; additional hubs as part of an extended regional passenger transport network; improvements to the road network including the A494 and A55 to aid cross-border road travel; and a potential third Menai Bridge crossing to meet demands from Wylfa Newydd and other projects within Anglesey, collectively will aid the movement and opportunities for skills within our current and future labour market.

OVERVIEW OF NORTH WALES

22,800

FROM NORTH WALES DAILY
INTO ENGLAND

30,700

PEOPLE TRAVEL TO WORK
IN NORTH WALES FROM
OUTSIDE OF REGION

28%

WORK OUTSIDE OF THE
COUNTY WHERE THEY LIVE

In addition to the need to consider how we attract back those previously domiciled within the region with appropriate skills, to meet new employment opportunities, the cross border mobility of skills is also an important component for future skills and employment considerations.

Whilst employers and projects within North Wales will continue to attract individuals, 12,900 commute out of Flintshire to work in West Cheshire and Chester, followed by 5,400 from Wrexham and 900 from Denbighshire into the same area. A further 1,100 commute from Flintshire to work in the Wirral, and 2,500 from Wrexham to work in Shropshire.

The east - west axis is a key component of the North Wales economy and labour market, and therefore administrative boundaries will not be a barrier, with the economy of North Wales inextricably linked and closely aligned to North West of England.

Complementing the development of a North Wales Growth Bid, partners within Cheshire and Warrington have developed a Devolution Growth Bid which aims to deliver 127,000 new jobs, and an increase of £27billion per annum to their collective GVA by 2040. The continued cooperation between partners either side of the border to compliment and support each others aims will be key to further enhancing the wider cross-border shared skills and labour market agenda.

However, Mid Wales is also increasingly dependent on the North Wales economy, with both the Deeside Enterprise Zone, and Wrexham Industrial Estate attracting a significant number of employees from Powys; whilst more of the highly skilled labour market domiciled in rural county such as Ceredigion, have travelled to work historically in facilities such as Trawsfynydd in Gwynedd, and will still likely be attracted to do so if the new proposed smaller modular reactor at the same site gets the go-ahead.

Increasing regional productivity is a key goal. However, to achieve this successfully, and to deliver a more successful and balanced economy, long term investment will be required to tackle long term challenges, especially around transport, business support, housing needs, and skills & employment.



REGIONAL PROJECTS & INVESTMENTS REQUIRING SKILLS

1. Wylfa Newydd
2. Orthios Biomass Plant
3. Land and Lakes, Anglesey
4. Advanced Manufacturing Skills & Technology Centre
5. HMP Berwyn, Wrexham
6. Northern Gateway, Flintshire
7. Warren Hall, Deeside
8. Parc Adfer Energy Recovery Facility, Deeside
9. Trawsfynydd Nuclear Modular Reactor
10. Llanbedr Space Port
11. Colwyn Bay Tidal Lagoon

The last three projects listed above are currently speculative, and if they develop further, will also demand specific and unique skills from within North Wales to support both their construction, and eventual operations.

The combination of employers from our Enterprise Zones, our flagship regional projects, key economic and growth sectors, and our economic backbone of micro businesses and SME's across the region, collectively require an increasing suite of demands in terms of skills & employment that meets their needs in a growing economy.

This part of the Plan aims to look at the demands facing the skills agenda and labour market within North Wales. Firstly presenting a broad overview of wider issues in terms of skills demands, and potential areas for consideration to address these, this section will then comprise an individual overview and analysis on the demands faced by each of three key economic sectors, and four identified growth sectors for North Wales.

PRIORITY SECTOR



ENERGY & ENVIRONMENT



ADVANCED MANUFACTURING
& MATERIALS



CONSTRUCTION

GROWTH SECTOR



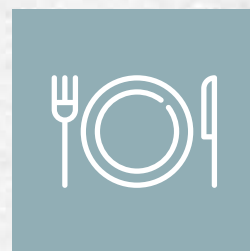
CREATIVE & DIGITAL



HEALTH & SOCIAL CARE



TOURISM & HOSPITALITY



FOOD & DRINK
MANUFACTURING

In addition to the specific technical, academic, and vocational skills that each of the seven sectors above demands and needs in terms of re-skilling our current labour market, particularly within SME's and micro businesses, employers from each of these sectors are in consensus on the need for all employees, current and particularly future employees, to have a suite of basic benchmark softer skills.

The views of employers in relation particularly to those new younger individuals entering the labour market for the first time, that many new recruits and appointees, whilst possessing many of the academic and industry specific skills they require, often show a lack of competency and awareness of the softer skills that employers need and require.



These include team-working, collaboration, worker-to-worker interaction, and worker-to-customer interaction, which are required in most, if not all modern workplaces.

A failure to address these basic softer skills across our labour market within North Wales for both new entrants, and those returning after a period of unemployment, may result in longer term unfilled vacancies, increased costs for training to employers, and employees operating within the workplace at below required levels.

EMPLOYER BASIC SKILLS REQUIREMENTS



The direction by Welsh Government to withdraw the provision of the National Work Experience Database (NWED) and associated health and safety checking service for work experience placements from Careers Wales remit has resulted in the opportunity for work experience and placements of young students being significantly affected. There is no longer a consistency of approach to support both young people, but also employers.

In light of the forecast growth to the North Wales economy, we need to work across education providers to support greater links with employers. Specific targeting needs to happen within schools at an earlier age, and addressing the deficit in careers guidance and work experience regionally for schools is an action which employers and education providers in the region should consider developing collectively with the support of partners including Careers Wales, the 14-19 network and regional EPC officers.

To compliment the developments nationally on the Welsh BaccaLaureate, we need to consider working with regional employers and employer representative bodies to develop a “North Wales Toolkit of Employability Skills” that would award an accredited single certification, collectively on behalf of regional education providers. Successful completion of the toolkit by participants would assist their meeting agreed labour market expectations and future employer demands within our key and growth sectors.



More support is needed for regional approach towards careers advice and guidance within our schools if we are to successfully equip our future labour market with the appropriate experience of the workplace, and thereby raise their aspirations to meet future employer demands

Developing a North Wales Toolkit of Employability Skills, that would award an accredited single certification, is exactly what the Private Sector wants to see. One of the biggest issues businesses face, when employing those entering the job market for the first time, is the need for these new starters to be “work ready” and have the relevant soft skills that today’s business environment demands. A “basic training” course leading to a certification that marks out job applicants as being “work ready” is essential. Given the cross border nature of our economy, this is a development that should also be progressed by working with our partners throughout Cheshire and the Wirral.”



EMPLOYER ADVANCED SKILLS REQUIREMENTS

COMPUTING & TECHNICAL	INFLUENCE
MARKETING	PRODUCT DEVELOPMENT

What was once perceived as advanced skills from employers as displayed above, are becoming the expected and mainstream skills demands within businesses in North Wales. The cross cutting themes of awareness and qualification within STEM subjects, numeracy and literacy, and general awareness of appropriate conduct and presentation within a workplace environment are areas which employers are placing further relevance upon when considering appointments of staff in all key and growth sectors.

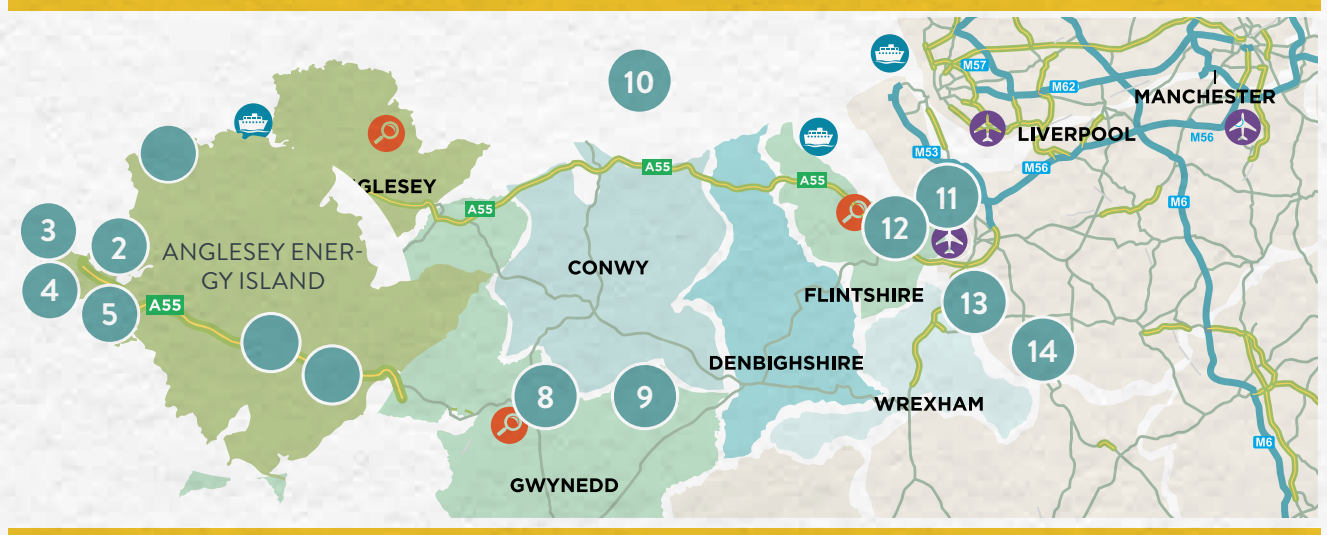
Continuing economic and political factors such as the recent Brexit vote will have a growing influence on the level and profile of product and service demand in North Wales, and thereby future skills demand in the workplace across the region.

Whilst the demands of regional transformative projects alongside our SME’s and micro businesses within the region continue at a project level, we also need to consider in parallel the demands of the labour market. Firstly if individuals as a result of pension and retirement changes remain in the labour market for longer, demand for retraining and continuing education is likely to increase. Secondly, if people are now working until they are older than in previous generations, this may reduce short-term opportunities for young people to enter the labour market and meet growing employer demands.

500
NEW JOBS EACH YEAR
REQUIRED BY HEALTH &
SOCIAL CARE

3,000
NEW JOBS EXPECTED IN
TOURISM SECTOR OVER THE
NEXT
10 YEARS

10,000
NEW JOBS TO BE CREATED
IN CONSTRUCTION IN THE
NEXT 5 YEARS



- 1 HORIZON NUCLEAR POWER**
Proposed New Nuclear Power Station with generating capacity of around 2.7 GW of low carbon energy.
- 2 LAND & LAKES**
Proposed 1100 Unit mixed use Development of Residential, Tourism Village and Leisure Facilities. Stage 1 - Wylfa Workers Accommodation.
- 3 HOLYHEAD PORT**
International Strategic Gateway
- 4 MINESTO**
Minesto is one of the world's leading developers of innovative tidal power technology; set up to commercialise a tidal energy converter known as Deep Green off the coast of Anglesey.
- 5 ORTHIOS**
Proposed 299 MW Biomass / Eco Park providing Energy & Steam for Hydroponic & Aquaculture Enterprises.
- 6 LLANDRILLO MENAI GROUP & LOCKHEED MARTIN**
Expansion of campus to include extension of Energy Centre
- 7 M-SPARC**
Proposed Science Park bringing together academic researchers and commercial experts.
- 8 SPACEPORT, LLANBEDR**
The Welsh Government has shortlisted this site for possible development. This proposed site could be operational in 2018

- 9 SMALL MODULAR NUCLEAR REACTOR, TRAWSFYNYDD**
The old nuclear power station site in Snowdonia could be the site for a new generation of nuclear power stations with 38 companies already showing an interest in building the facility, which could be ready by 2025.
- 10 TIDAL LAGOON, COLWYN BAY**
Creating marine renewable energy from 'tidal range' turbine technology. Currently awaiting government review of viability based on strike price/Swansea lagoon project.
- 11 NORTHERN GATEWAY, FLINTSHIRE**
At 200 hectares it will be the largest mixed use development site in Wales for commercial use in engineering, electronics, plant assembly and services sector as well as residential developments.
- 12 WARREN HALL, DEESIDE**
A private sector led 80,000m2 high quality employment site with planning consent for employment use including a 120 bed hotel and retail development.
- 13 HMP BERWYN, WREXHAM**
Largest prison development in the UK is currently in the building phase, estimated value of £22.5m per annum to the local economy. On target for completion in 2017 .
- 14 WREXHAM ENERGY CENTRE**
Wrexham Energy Centre (WEC) is a new proposed combined cycle gas turbine (CCGT) gas-fired power station to be located on Wrexham Industrial Estate.

DEMAND KEY SECTOR: ENERGY & ENVIRONMENT

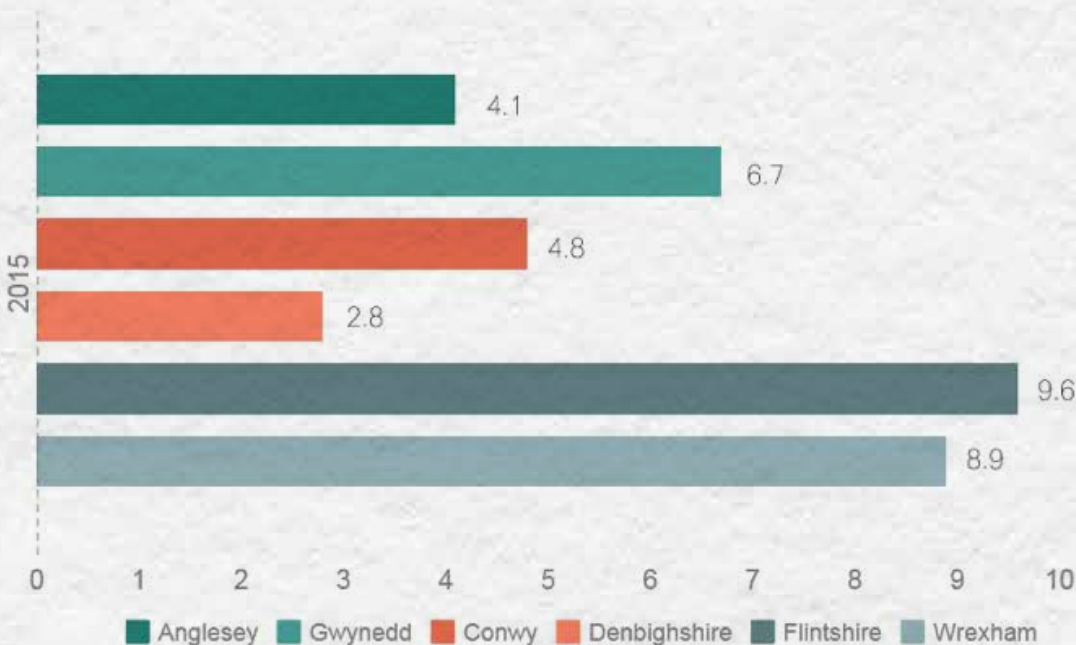
The energy & environment sector is a key employer within North Wales, and therefore identified as one of the three key sectors for the region within the Plan.

Incorporating subsectors that includes energy generation and its use, renewables and low carbon alternate fuels, energy efficiency, and waste management, the sector continues to evolve as one of the key socio-economic drivers for North Wales.

With a number of innovative and large scale projects across this diverse sector expected to commence in the next five years, in addition to those facilities and projects already operational, there are numerous skills requirements all based on the baseline of STEM competencies, that each then require additional specialisms to meet increasing demands.



Whilst the sector is one identified as key at both regional and national level, it is difficult to obtain a clear and consistent representation of the workforce within the sector due to different interpretation of component elements of the labour market by different providers and the inclusion of construction and manufacturing data by some within elements of this sector.



Source: Welsh Government 2015



Those employed in this key sector within North Wales are long-term employees, particularly as we have seen in the Trawsfynydd and Wylfa nuclear power stations, where staff turnover is low, and salaries are high in comparison to other employers within this sector.

Demands by employers for new entrants into the sector are that they need to be already well-trained within basic competencies and demonstrate particular key skills prior to appointment. The promotion and need for a greater number of STEM qualified individuals within North Wales can not be underestimated as employers increasingly raise their expectations in light of greater competition for fewer well paid employment opportunities.

The potential new jobs to be created as part of Wylfa Newydd are well documented, with up to 8,500 jobs estimated within the construction phase, and over 1,000 new jobs in the operational phase. The scale of the £12 billion plus project to be undertaken at Wylfa Newydd should not be underestimated in terms of its impact on the skills base within the region, and its wider effect on the supply chain. The need for appropriately skilled contractors, engineers, and project managers for the construction phase will be significant, with the expectation they will be working within project requirements including 270,000m3 of concrete, 100km of piping and 70,000t of reinforcing bar in addition to a wide range of support across all sectors

The operational phase which is currently estimated for approximately 2024 is scheduled to supply power for upto five million homes and have an operational life of at least 60 years. The operational staffing for the power station is expected to be upto 850 routinely, with upto 1,000 operational staff at key points of capacity.

Detailed figures on the requirements for the build phase of Wylfa Newydd are still unavailable (June 2016), and therefore we are only able to speculate on the expectations for the roles and employment opportunities that will be required. Yet for staff who will be working on the site during the build phase, traditional construction skills and competencies will need to be further enhanced with additional nuclear construction skills and competencies to meet and deliver demand.

DEMAND AREAS FOR NUCLEAR CONSTRUCTION



The release of information from the primary contractors on the numbers expected and the skills required will greatly assist industry leaders such as CITB, alongside our further education providers particularly, be able to then plan and promote effectively the career and employment opportunities during the build phase of the project.

DEMAND KEY SECTOR: ENERGY & ENVIRONMENT

Currently both Grwp Llandrillo Menai and Coleg Cambria have strong construction and built environment related suites of courses on offer. The difficulty faced by both providers in light of calls from commentators to increase their offers and numbers of students, is that without more definitive information, students, influenced particularly by their parents, are not keen to enter into a pathway whose outcome is still not clear or known in terms of timing or scale.

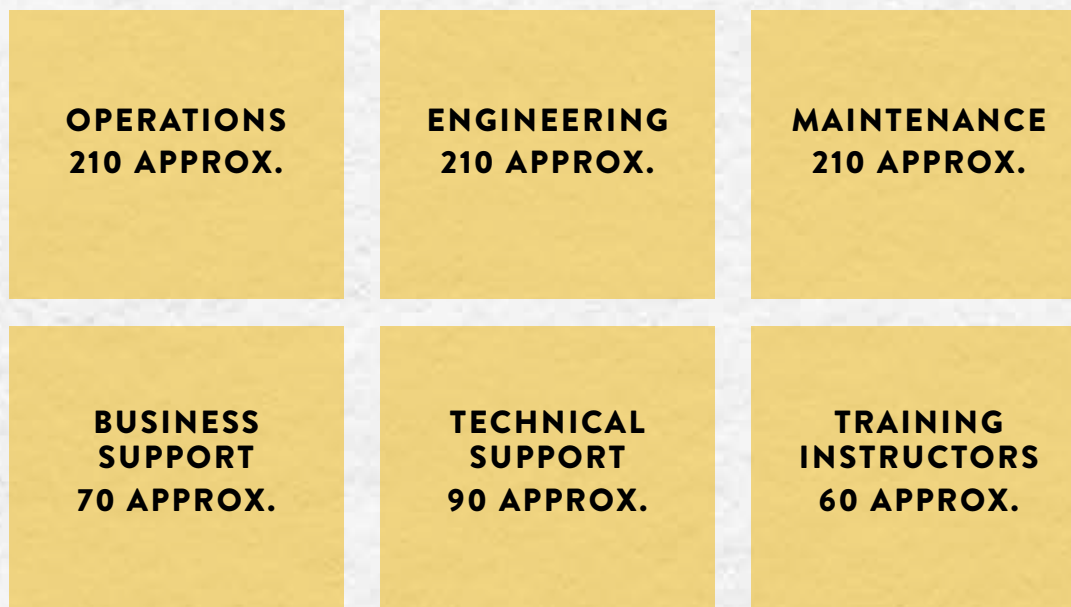
The potential correlation of project developments in Wylfa Newydd and other areas of the UK such as Hinkley Point, although different technologies operationally, is a significant risk as both will require nuclear competent and trained construction workers at the same time.

With an aging construction workforce within North Wales as already highlighted within this Plan (34% aged 50+), promoting new entry to that sector to meet the demands will be key.

The opportunities to upskill in supply chain areas such as the manufacturing sector within North Wales to meet the demands of energy projects such as Wylfa Newydd should also not be underestimated.

As a region we will need to address this demand by helping manufacturers raise quality, develop capability, increase their knowledge within nuclear and all other applicable regional energy subsectors, to therefore be in a stronger skills position to bid for and win new business across the key economic sector for North Wales. The commitment to develop the proposed Advanced Manufacturing Skills & Technology Centre at Deeside will be essential to this.

DEMAND AREAS FOR NUCLEAR OPERATIONAL STAFFING



Promotion of apprenticeships within the sector is a key area of opportunity for both employers and those individuals looking to enter or progress within the sector directly, or to benefit in related sectors such as construction and manufacturing and the wider supply chains, as a result of key energy transformational projects.



Support from providers within the region continues to evolve to meet demand and expectation, but potentially improved promotion and flexibility of delivery may further assist to meet commercial needs and opportunities. A note of caution is recognition that in North Wales, a high proportion of young people remain in education at 16 and so the apprenticeship demand will tend to attract learners over the age for 18/19, and therefore numbers in the 16-18 bracket will be low.



Challenges facing the sector include the need to expand education and skills provision regionally to stimulate and inspire future career pathways in the sector as a response to an aging current workforce, and a need for greater technical STEM related skills to meet employer and technological demands

As a consequence of the developments and demands within the Energy sector in North Wales, where much will be concentrated in the west of the region (including Orthios and Minesto in addition to Wylfa), there will be a growth in the requirement for engineering skills including apprentices (including Higher Apprentices) and other engineering skills at all levels.

To reflect the importance of this growth and to meet future demand, there is a clear need to extend provision and facilities at the Llangefni campus in Anglesey as a technology hub for the region due to its proximity to the key transformational projects. The next step in creating this hub is extending the recent Energy Centre and Construction Centre to become part of a single regional excellence hub, with in addition, a new industry responsive modern engineering facility on the campus, which would incorporate the relocation of current delivery from other sites.

Skills from this expansion at Llangefni will also be required to help to address the demands from the ORTHIOS project. This is the development of an estimated £1billion facility on Anglesey that will require approximately 800 construction jobs, and deliver upto 700 long term jobs once operational in 2018.

The proposal is that Orthios will in addition to being an Eco Park facility will also primarily deliver 299MW of energy for 300,000 homes, created through a Biomass plant and a combined food and power facility (aquaponics and hydroponics). The development will also be the worlds' largest inland prawn-growing facility and worlds' first home compostable food packaging facility.

LOW CARBON FACILITIES AND PROPOSALS FEATURE IN ALL 3 ENTERPRISE ZONES

RE-SKILLING AND UP-SKILLING OF EXISTING WORKERS TO MEET NUCLEAR NEW BUILD REQUIREMENTS IS A PRIORITY

EXPANSION OF ENERGY SECTOR WILL CREATE ADDITIONAL DEMANDS IN REGIONAL SERVICE SECTORS

Other expansion demands within the sector in the west of the region include Minesto, and their proposed development of technology to harness and convert tidal energy off the coast of Anglesey; and work by the national grid to explore the deployment of key technology and skills to connect proposed new low carbon energy between Anglesey and North Wales.

In the east of the region, there are other demands on current and future skills needs with proposed new developments. This includes the Wrexham Energy Centre which is a new proposed combined cycle gas turbine (CCGT) gas fired power station to be located on the Wrexham Industrial Estate.

DEMAND KEY SECTOR: ENERGY & ENVIRONMENT

The project will require approximately 500 construction workers with key skills in both gas and electrical connections to help assemble three turbine halls, and once operational, an estimated 30 highly qualified and well paid jobs to manage and operate this innovative facility.

Within Deeside, a similar operational employment offer of 35 highly skilled new positions will be required by the proposed Parc Adfer Energy Recovery Facility. The project will be treating non-recyclable waste and involves an estimated £50million of private sector funding over 2017-2020 that will support a further 300 construction jobs.



- | | |
|--|--|
| <p>1 HORIZON NUCLEAR POWER
Proposed New Nuclear Power Station with generating capacity of around 2.7 GW of low carbon energy.</p> <p>2 MAGNOX
Wylfa, the largest and last of the Magnox power stations ceased generation at the end of 2015. It is now being defueled.</p> <p>3 M-SPARC
Proposed Science Park bringing together academic researchers and commercial experts.</p> <p>4 LLANDRILLO MENAI GROUP & LOCKHEED MARTIN
Expansion of campus to include extension of Energy Centre</p> <p>5 LAND & LAKES
Proposed 1100 Unit mixed use Development of Residential, Tourism Village and Leisure Facilities. Stage 1 - Wylfa Workers Accommodation.</p> <p>6 MINESTO
Minesto is one of the world's leading developers of innovative tidal power technology; set up to commercialise a tidal energy converter known as Deep Green off the coast of Anglesey.</p> <p>7 NATIONAL GRID
Connecting proposed new low carbon energy on Anglesey</p> | <p>8 ORTHIOS
Proposed 299 MW Biomass / Eco Park providing Energy & Steam for Hydroponic & Aquaculture Enterprises.</p> <p>9 PARC ADFER, DEESIDE
A proposed new energy recovery facility for North Wales.</p> <p>10 GWYNT Y MŌR (RWE INNOLOGY)
The company operates all three of Wales' offshore windfarms, including the 160 turbine Gwynt y Môr Offshore Wind Farm.</p> <p>11 MAGNOX
Trawsfynydd is a shut-down nuclear station in the late stages of decommissioning.</p> <p>12 FIRST HYDRO / GDF SUEZ
Hydro-electric pumped storage plants at Llanberis and Ffestiniog in Snowdonia.</p> <p>13 HOLYHEAD PORT
International Strategic Gateway</p> <p>14 WREXHAM ENERGY CENTRE
Wrexham Energy Centre (WEC) is a new proposed combined cycle gas turbine (CCGT) gas-fired power station to be located on Wrexham Industrial Estate.</p> |
|--|--|



The Advanced Materials and Manufacturing sector is a key employer within North Wales, and also for Wales; and therefore is identified as one of the three key sectors for the region within the Plan.

Incorporating subsectors that includes aerospace, automotive, chemical and petroleum, engineering and precision engineering, life sciences, materials and coatings, opto-electronics, sector specific IT and support services, packaging, professional services, marine, garments, metal and steel; the sector continues to evolve as one of the key socio-economic drivers for North Wales.

With a number of innovative and large scale projects across this diverse sector expected to commence in the next five years, in addition to those facilities and projects already operational, there are numerous skills requirements all based on the baseline of STEM competencies, that each then require additional specialisms to meet increasing demands.

The manufacturing sector has generated £1,094m of Gross Value Added (GVA) within the region in recent years and the skill demands in this sector continue to evolve. The Deeside Enterprise Zone and Wrexham Industrial Estate have helped to attract and sustain around in excess of 20,000 jobs, and the labour market within this sector in North East Wales particularly has considerable cross-border influences with strong links to the North West of England within the Mersey Dee geography, covering Liverpool, Wirral and Cheshire.

This part of the region is primed to attract further development and generate additional skills, jobs and growth, whilst continuing to support current businesses such as global leaders Airbus, who have the largest aerospace manufacturing operation in the UK at their Broughton site. Other strategically important companies within North East Wales include Tata Steel, Toyota, JCB, Hoya, Kellogg's and UPM Shotton.

Whilst there is the larger concentration of companies and employers within this sector in North East Wales, there are still approximately 230 smaller companies within this sector operating within North West Wales, therefore, making it a true regional key priority area.



Analysis of the breakdown of AM&M employment across the region by sub-sector shows that North Wales has a higher proportion of employment in aerospace (25%) and electronics (19%), compared with both the rest of Wales and the UK.

Collectively, these two sub-sectors account for 44% of all AM&M employment in North Wales, and the top 5 sub-sectors by employment account for 83% of all AM&M employment in the region. They are Aerospace (25%), Electronics (19%), Metals (14%), other engineering activities (13%), and automotive (12%).

DEMAND KEY SECTOR: ADVANCED MATERIALS & MANUFACTURING

Engineering companies account for more than half (57%) of all AM&M units in North Wales, in comparison to the rest of Wales where just under 50% of AM&M businesses are engineering companies. Conversely whilst aerospace companies account for only 2% of all AM&M businesses in North Wales, they represent 25% of employment within this sector regionally.

If North Wales is to continue to grow its economy to successfully compete against other regions, our employers particularly in key sectors such as energy, manufacturing and construction, need to have a highly-skilled technician workforce. Our other growth and traditional sectors within North Wales including agriculture, digital, and also health, increasingly depend on highly-skilled technicians if they are to continue to operate efficiently.

North Wales follows the UK benchmark for performing relatively well when it comes to graduate-level and higher skills. But at the sub-degree, skilled technician level within manufacturing, our performance is not as positive on a regional wide basis. Whilst we have pockets of excellent technicians within key geographies such as Deeside and Wrexham where larger companies are able to attract, recruit and train appropriate individuals, smaller employers in the sector elsewhere in the region are finding that recruitment of qualified technicians is becoming an issue.

FUTURE SKILLS SHORTAGES

**PROFESSIONAL
ENGINEERS**

SCIENTISTS

**TECHNOLOGISTS
AND TECHNICIANS**

During 2015, monitoring of vacancies across the sector generally revealed that there were nearly 1,400 technical engineering job vacancies posted in North Wales, with the majority of these concentrated with employers in Wrexham and Flintshire.

Broad occupations in demand included Operators/Assemblers, and Craft & Technicians. Specific occupations in demand included production managers, engineering technicians & scientists, and engineering & production technicians. Specific job titles in demand included maintenance engineers, CNC machinists and welders.

Technical skills in demand included repair, machinery, inspection and CAD, while non-technical skills demand included softer skills that are increasingly common requests of future staff across all sectors in North Wales - namely communication, computer skills, quality assurance and control and problem solving.

Apprenticeships within this sector are highly sought and valued, with companies such as Airbus offering upto 100 apprenticeships and graduate placements annually. The success of this particular scheme is evident in that almost two thirds of managers currently at the Broughton site were all formerly apprentices in the company.

However, in recent years there have been recruitment issues with Airbus and some potential apprentices not having the wider softer skills and broader experience to deliver in addition to their academic qualifications and achievements.



With the concentration of large manufacturing companies within Deeside and Wrexham, there is a growing feeling amongst smaller employers within the sector that they are not able to attract and recruit the best potential candidates for apprenticeships as they are unable to offer the added incentives and rewards which larger global companies within the region can offer.

In 2014/15, of those domiciled in the region, there were 590 learning activities relating to manufacturing and production work in further education across North Wales, 5 of which were at NQF level 1, 465 at level 2, 105 at level 3 and 5 at level 4. This is an increase from 540 learning activities in 2013/14, but lower however than the 570 activities in 2012/13.

In 2014/15, of those domiciled in the region, there were 405 manufacturing-related apprenticeship programmes in North Wales, 355 of which were at level 2, 50 at level 3 and less than five higher apprenticeships. This is a decrease from 490 programmes in 2013/14, 460 of which were at level 2 and 30 at level 3.

Identifying the potential future supply of skills to meet the demands to this sector, we have used Careers Wales national survey of career aspirations of young people in Year 10 of secondary schools.

In 2015, the results showed that in North Wales, from a sample of 5,398 young people, 4.15% (224) young people indicated that manufacturing, industry and factory work was one of their top 4 career choices, with 7% of this cohort indicating that manufacturing, industry and factory work was their first career choice.

In addition to the Coleg Cambria & Swansea University Centre at Deeside which will address skills in aerospace from September 2016, the proposed development of the Deeside Advanced Manufacturing Skills & Technology Centre will be a world leading facility for the commercialisation of new technologies, and developing the engineers and technicians needed to apply them. The Centre will help to establish a cluster of supply chain businesses supporting major companies within the Enterprise Zone.

With a delivery timescale for implementation potentially commencing in 2020, the £10million public investment will help to create 100 permanent jobs, and also provide a location for an Engineering Faculty (an outreach facility for Coleg Cambria), an Advanced Composites Centre and potentially, a Deeside High Performance Computing Centre which collectively would not only become a centre of excellence for all of North Wales, but also a facility to be utilised by employers and individuals from the cross-border geography of the Mersey Dee area.

DEMAND KEY SECTOR: CONSTRUCTION

The construction sector is a key employer within North Wales, and therefore identified as one of the three key sectors for the region within the Plan.

As the fifth largest sector of employment in North Wales, and 13.6% of all occupations recorded in the region being in 'skilled trades', this sector is one of the most significant that has an impact on, and is also influenced by, other sectors across North Wales.

The sector itself is diverse, and encompasses many skilled trades which work across a variety of disciplines and specialisms including: construction of buildings (residential/non-residential), infrastructure, industrial, civil engineering, construction services, manufacture of construction materials, specialised construction activities, bricklaying, groundworks, electrotechnical, heating and ventilation, plumbing and heating, fencing, plastering, carpentry & joinery, painting, glazing, and roofing.

8,500

WORKERS NEEDED AT
PEAK OF BUILD FOR
WYLFA NEWYDD WITH
APPROPRIATE NUCLEAR
CONSTRUCTINO SKILLS

3,065

PEOPLE STUDIED
CONSTRUCTION BASED
COURSES ACROSS NORTH
WALES IN 2014-15

£2.7bn

WORTH OF CONSTRUCTION
PROJECTS FOR NEXT
10 YEARS EXCLUDING
WYLFA NEWYDD

Using data from Stats Wales and the Business Register and Employment Survey (BRES) we can report that 16,100 people are employed within this sector (2014 data). This is an increase on the figures for both 2013 (13,800) and 2012 (14,100).

The total figure is made up of different components in terms of skills and competencies, and therefore includes approximately 1,300 at management & supervisory level; 12,100 in skilled trades; and 500 who are plant and machine operatives.

Across the six counties within the region, Flintshire has the highest number of people employed within this sector with 4,000, followed by Wrexham and Gwynedd each with 2,800, Conwy and Denbighshire both with 2,500 and Anglesey with 1,500.

Estimates from CITB and other industry bodies show that we will need to increase recruitment within the sector to meet specific demands, including the development of specialisms in the area of nuclear based construction. This will be in addition to increased demands for bricklayers, civil engineers, architects, and wood trades across the region.

57%

REGIONAL CONSTRUCTION
WORKFORCE AGED 25- 49

34%

REGIONAL CONSTRUCTION
WORKFORCE AGED 50+

9%

REGIONAL CONSTRUCTION
WORKFORCE AGES 16-24

With the potential for 8,500 construction workers at peak in Wylfa Newydd, it is clear that the currently construction workforce within Anglesey, if all left their current employment to work at the project, would only be able to service a fifth of the potential positions available. We would therefore need to extend the construction opportunities to the wider North Wales region to realistically meet demands, and not be restricted as previous Wylfa commentators have promoted, to only North West Wales.



The release of information from the primary contractors on the numbers expected and the skills required will greatly assist industry leaders such as CITB, alongside our further education providers particularly, to be able to then plan and promote effectively the career and employment opportunities during the build phase of the project.

Currently both Grwp Llandrillo Menai and Coleg Cambria have strong construction and built environment related suites of courses on offer. The difficulty faced by both providers in light of calls from commentators to increase their offers and numbers of students, is that without more definitive information, students, influenced particularly by their parents, are not keen to enter into a pathway whose outcome is still not clear or known in terms of timing or scale.



Challenge for the sector in North Wales is to raise awareness amongst young people, particularly females, of the opportunities that exist in the sector. This will help change perceptions of the in industry and address future skills gaps and potential medium term shortage due to an ageing workforce, including demand for technical and specialised construction skills

CITB within their projected forecasts and analysis in discussion with regional partners estimate that the five year national output forecasts for 2016 to 2020 in Wales is 7.1% a year on average. This could increase by infrastructure growth in excess of 21% a year if work commences on Wylfa Newydd as forecast from 2019.

If Wylfa Newydd was excluded from sector forecast data, we would still see an expansion within the region with an average rise of 3.7% forecast due to other key drivers of economic growth that will impact on the sector including the £800 million biomass plant on Anglesey, and the Park Adfer Wheelabrator energy recovery facility at Deeside.

In addition to large scale singular projects, significant growth is also predicted in the housing sector, with new homes forecast to be built across the region as identified within Unitary Development Plans. A current example of expansion within the housing sector is the Clwyd Alyn Housing Association which manages over 5,500 properties. It currently has 23 new housing projects in development across Anglesey, Conwy, Denbighshire, Flintshire, Powys and Wrexham, consisting of 154 units for rent and 26 for rent or purchase.

Future skills are key to the continued expansion of this sector within North Wales, in addition to opportunities to upskill the existing workforce – many of whom are employed within small micro businesses, or are self-employed.

Promotion of apprenticeships within the sector is a key area of opportunity for both employers and those individuals looking to enter or progress within the sector. Support from providers within the region continues to evolve to meet demand and expectation, but potentially improved promotion and flexibility of delivery may further assist in meeting commercial needs and opportunities.

If the region is to help contribute towards delivery of national targets of 100,000 new apprenticeships, the construction sector within North Wales needs to build on and expand existing best practice with delivery by providers at a local level. This will be in addition to negotiation for minimum new apprenticeship opportunities by flagship regional projects as we have already seen with the North Wales Prison project and the company 'Lend Lease', in its commitment to create 100 new apprentices by completion of the build in Autumn 2017.

The agreement with project developers on community clauses which includes a commitment to deliver apprenticeships, traineeships, and work placement opportunities, will need to be carefully considered in relation to specific areas both in terms of skills and geography, and what is appropriate in terms of need within the region.

DEMAND KEY SECTOR: CONSTRUCTION

In addition to the transformative and current projects listed within the tables below, there is the potential for labour difficulties within the North Wales construction sector due to other projects commencing at approximately the same time.

These include the Caernarfon by-pass which is a £60 million project scheduled to commence in Dec 2016; construction of 600+ commercial and residents within Flintshire in a project worth at least £50 million; highways works and improvements on Anglesey worth £50 million scheduled to commence later in 2016; potential moving of timescales for work on the A55 to take advantage of EU funding prior to 2018; and also the commencement at the end of 2016 of the new Menai Science Park which is worth approximately £47 million in terms of costs.



Future Demands:

BRICKLAYERS / WOOD TRADES
/ PLANT MECHANICS / CIVIL
ENGINEERS / ARCHITECTS

A national annual survey is carried out by Careers Wales of KS4 learners career aspirations. The results in 2015 showed that in North Wales, from a sample of 5,398 young people, 13.22% (714) indicated that 'construction work' was one of their top 4 career choices, and 3.9% (211) indicated that construction work was their first career choice. Amongst those who indicated that construction was their first career choice, 42 indicated that they would seek an apprenticeship, 85 would prefer to stay on in FE college and 48 would prefer to stay on at school.



CONSTRUCTION ON TRANSFORMATIVE PROJECTS IN NORTH WALES

	PEAK CONSTRUCTION JOBS (ESTIMATED)	PROJECT WORK START DATE (ESTIMATED)
Biomass Plant, Anglesey	1,200	2017
Advanced Manufacturing Skills & Technology Centre, Deeside	500	2020
HMP Berwyn, Wrexham	800	CURRENT
Land & Lakes, Anglesey	400	2017
Northern Gateway, Flintshire	1,000	2020
Parc Adfer Energy Recovery Facility, Deeside	300	2017
Warren Hall, Deeside	1,000	2018
Wylfa Newydd	8,500	2019

The sector will require higher numbers of new recruits within the region to meet the needs of the above projects due to current workforce numbers, of which 34% is currently aged over 50, and there are not significant numbers of younger new entrants into the sector to both replace those leaving, and to meet increase demands and expectations from the above.

In addition to the transformative projects, there is also ongoing work across North Wales by the sector in the projects below:

	NAME OF PROJECT	VALUE £M	START DATE	SECTOR
Flintshire	Strategic Housing and Regeneration Programme (SHARP)	500	OCT 15	New housing
Anglesey	Menai Science Park	45	NOV 16	Innovation
Flintshire	Primary & Secondary Schools	19	JAN 15	Public – non housing
Denbighshire	School (Extension/Refurbishment)	15	NOV 15	Public – non housing
Gwynedd	146 Houses & 28 Flats	13	JUL14	New housing
Denbighshire	Electricity Substation/Cabling	12	APR 15	Infrastructure
Anglesey	School	9	DEC 15	Public – non housing
Flintshire	Convertor Station	9	JUN 13	Infrastructure
Flintshire	96 Residential Units	6	MAR 14	New housing
Wrexham	College Sports Hall (Extension)	5	SEP 15	Public – non housing
Wrexham	Industrial Unit/Warehouse	5	MAR 16	Private industrial

Source: CITB – Glenigan Project Analysis

The creative & digital sector is an innovative key employer within North Wales, and therefore identified as one of the growth sectors for the region within the Plan.

17%

INCREASE IN NUMBER OF ENTERPRISES IN THIS SECTOR BETWEEN 2010 AND 2015 IN NORTH WALES

11,000

CURRENTLY EMPLOYED WITHIN THIS SECTOR IN NORTH WALES

25%

OF THOSE ACROSS WALES EMPLOYED IN THIS SECTOR, ARE IN NORTH WALES

Incorporating subsectors that include publishing, television, video, film, theatre, radio, advertising, PR, gaming, performing arts, and photography, the sector continues to evolve as one of the key socio-economic drivers for North Wales, as characterised by a highly qualified labour market, with 68% of the workforce in possession of at least a degree level qualification.

According to the UKCES, employment in the Creative Media and Entertainment sector is projected to grow across the UK, with this growth likely to be focused around higher level occupations (managers, professionals and associate professionals). The increased need for STEM skills infused with creative talent will be key to the development of HE and FE courses and the success of the Creative & Digital sector in North Wales.

Across the Creative Media Industries in Wales, employers report that skills in short supply from new entrants include sales and marketing skills (41% of employers), leadership and management (39%), Welsh language skills (33%) and using sector specific software packages (30%).

SKILLS DEMANDS IN THE SECTOR FOR NORTH WALES

GROWTH IN TELEVISION PRODUCTION

INNOVATION WITH NEW DIGITAL PLATFORMS

RETENTION AND PROMOTION OF TALENT IN THE REGION

PROMOTION OF OUR SKILLS TO THE GLOBAL MARKET



In addition to the transformative projects, there is also ongoing work across North Wales by the sector in the projects below:

Total number of enterprises within the Creative & Digital Sector

	2013	2014	2015
Isle of Anglesey	80	75	80
Gwynedd	235	245	250
Conwy	165	180	175
Denbighshire	145	150	160
Flintshire	235	255	290
Wrexham	180	195	205
NORTH WALES	1,040	1,100	1,160
WALES	4,820	5,170	5,425

Source: Welsh Government analysis of Inter-Departmental Business Register (IDBR), ONS

DIGITAL GROWTH



North Wales has an increasing number of companies as indicated on this map, specifically supporting the wider digital economy with expertise within digital intelligence from industry software and innovation to video games development.

Proximity to the density of enterprises within Liverpool and Cheshire as a cluster, is of benefit to the growing skills demands of the region, and particularly the development of complimentary digital skills to support our other key and growth sectors alongside transformational regional projects within North Wales.

The focus on the sector regionally as a growth sector aligns to Welsh Government intent with the previous Minister for the Economy, Edwina Hart noting in 2015 that “Creative industries is one of our fastest-growing priority sectors. We want to establish Wales as an international centre of excellence”.

927

PEOPLE STUDYING CREATIVE ARTS & DESIGN COURSES IN HIGHER EDUCATION IN NORTH WALES IN 2015

3,175

PEOPLE STUDYING CREATIVE & DIGITAL RELATED COURSES IN FURTHER EDUCATION IN NORTH WALES IN 2015

25

APPRENTICESHIPS AT LEVEL 3 & 4 WITHIN THIS SECTOR IN 2015

There are both current and proposed developments across the sector within North Wales which is further stimulating demand for skills and expertise across the sector:



The sector in North Wales is ideally placed strategically and geographically to meet increasing demands with the further development of a creative cluster and network using key flagship projects, and increasing the skills competencies and developments within the appropriate sub-sectors.

Increased connectivity to sector opportunities within Ireland, Liverpool, Manchester, Media City at Salford Quays, and the hubs within South Wales, are all opportunities which North Wales can support and in some instances, lead on, should we align our skills via a regional connectivity and coordination, and increase and promote appropriate pathways into the sector, whilst supporting appropriate upskilling of those already employed.

Recent examples of IT companies based within the Parc Menai Business Park at Bangor having to recruit new staff from outside of the region, despite the proximity to higher and further education institutions, highlight the need for closer alignment between businesses within the sector and education providers generally. There is growing concern of demand outstripping supply in web based technologies, and failure to address increase linkages between education and industry may impact on our growing high-end data and digital service companies such as AVOX and Moneyppenny.

Professionals working across the industry in North Wales are experiencing increased pressure to keep up with rapidly changing advances in technology and seeking to become more commercial. With existing major employers within the sector across North Wales including BBC Cymru Wales, Theatr Clwyd, and independent production companies such as Rondo Media, Cwmni Da, Antena, Recordiau Sain, and Cwmni Chwarel, we need to cooperate regionally to identify the further demands for skills training and qualifications where applicable. The differential between the cluster of Welsh language media in North West Wales, and the creative arts in North East Wales also needs to be better aligned to meet regional demands for skills, deliver parity in funding and meet sector demands, such a growth in the sub-sector of animation.

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Theatr Clwyd in Mold is an example of an employer of 130 staff whose current proposed expansion plans highlight a need for growth within the sector in North East Wales that would include a cultural hub for the creative and digital enterprises, with the potential to offer incubation spaces for new entrepreneurs looking to start up or develop their activities. This would also help promote further innovation and entry into the sector generally via apprenticeship routes, building on the theatre's existing participation in a Wales-wide Technical Theatre Apprenticeship scheme, with participants spending a year developing their skills and working towards a Level 3 qualification.



The health and social care sector continues to be a key contributor to the economy within North Wales, with increased investment and expansion forecast. Identified as one of the growth sectors for employment and skills across the region within the Plan, there is considerable opportunity for further development of innovative methods of delivery to meet client needs, and the promotion of sustainable careers pathways and development in response to increased demands.

45,000

PEOPLE EMPLOYED ACROSS THE HEALTH & SOCIAL CARE SECTORS IN NORTH WALES

2,000+

BUSINESSES ACROSS THE REGION WITHIN THIS BROAD SECTOR

500

NEW JOBS EACH YEAR FOR THE NEXT 20 YEARS TO BE CREATED IN THIS SECTOR IN NORTH WALES

The health and social care sector covers a broad range of services including nursing, dental nursing, healthcare support services, pharmacy services, social care, childcare, elderly care, residential care, and domiciliary care. There are also links to activities within the 'Life Sciences' sphere including medical technology, pharmaceutical services, regenerative medicine and neuroscience.

The sector in North Wales faces significant skills and staffing issues in the coming years which will affect employers ranging from Betsi Cadwalader University Health Board, to independent small nursing homes, and many facilities and services inbetween.

Changes within North Wales with a shift of focus from secondary care to primary and community care and prevention, and delivering routine care as close to our communities as possible will incur challenges on the skills needs and requirement expected, and potentially further exacerbate recruitment and training issues.

Recruitment difficulties across the care sector, in addition to medical, nursing, and community posts need to be a priority for the future sustainability of the sector in North Wales. GP recruitment is especially challenging and continued difficulties with recruiting to GP posts and out of hours GP services across North Wales health economy are a significant workforce risk to the continuation of provision of Primary Care services in North Wales for both the short and long term.

North Wales also has a potential issue with the recruitment of those roles currently classed as 'Other Health Care Professionals' (OHPs). These include roles such as pharmacists, therapists, and physician's associates, who are all critical to the sector in meeting demands to improve community services and keep people at home rather than admitting them to hospital.



Attraction, recruitment and retention of labour with appropriate skills is a critical risk for this sector in North Wales as it looks to deliver to an increasingly aging population with greater specialist demands

DEMAND GROWTH SECTOR: HEALTH & SOCIAL CARE

From a recent regional workforce analysis in 2014 there were 229 managers in post in residential care for older people; 203 Assistant/Deputy managers; 647 Senior Care Workers; and 3,632 Care Workers. The demographics of this cohort collectively for the residential care sector show that the largest age group were people aged between 41- 50 with only 14% of the workforce aged under 25. The data recorded also showed that 49% of the residential care for older people workforce was aged under 40 years of age, with 51% aged over 41. In terms of the gender profile 19% of the workforce were male, and 81% female.

The same analysis for domiciliary care recorded 159 Managers in post; 143 Assistant/Deputy Managers; 305 Senior Care Workers; and 3,397 Care Workers. The demographics of this cohort collectively for the domiciliary care sector show that 26% of the workforce are aged between 41-50 years of age, and 15% of the workforce aged under 25. The gender profile of the domiciliary workforce shows that 19% of the workforce were male, and 81% female.

61%

OF CARE WORKERS IN
RESIDENTIAL CARE HAVE
THE APPLICABLE LEVEL 2
DIPLOMA IN NORTH WALES

51%

OF CARE WORKERS IN
DOMICILIARY CARE HAVE
THE APPLICABLE LEVEL 2
DIPLOMA IN NORTH WALES

72%

OF ESTABLISHMENTS NEED
TO INCREASE AND UPDATE
THE SKILLS OF THEIR STAFF
IN THE NEXT YEAR

Data also shows that 82% of Senior Care Workers in North Wales held the recommended qualification of either Level 5 Diploma in Leadership for Health and Social Care Services (Adults Advanced Practice), or the Level 3 Diploma in Health and Social Care (Adults).

Retention and recruitment across the health and social care sector continues to be an issue. This is particularly for those employed within the residential and domiciliary care sectors, where staff turnover is high, appropriate qualifications vary, and career pathways are not actively promoted.

Recent surveys of the sector within North Wales point to skills issues with current and new staff as there had been an 8% drop in the number of qualified domiciliary care workers. This could partly be due to the increase in the total number of staff joining the sector without qualifications as of the 730 domiciliary care workers recruited in 2014, only 27% held the recommended qualification.

10,005

LEARNING ACTIVITIES
WITHIN THIS SECTOR
ACROSS FURTHER
EDUCATION IN NORTH
WALES DURING 2024-15

1,679

STUDENTS STUDYING
MEDICINE RELATED
SUBJECTS IN UNIVERSITY
IN NORTH WALES DURING
2014-15

3,270

APPRENTICESHIPS IN
HEALTHCARE & PUBLIC
SERVICES ACROSS NORTH
WALES DURING 2014-15

The number of learning activities within Further Education for this sector fell in 2014-15 from a recent peak of 15,215 activities in 2013-14. There were 12,250 learning activities in 2012-13. The apprenticeship programmes in health care and public services in North Wales also saw a decrease from 3,945 programmes in 2013-14. There were 3545 programmes in 2012-13.



TOTAL NUMBER EMPLOYED

WITHIN HEALTH SECTOR IN NORTH WALES BOTH FULL-TIME & PART-TIME :

	2012	2013	2014
Isle of Anglesey	2,600	2,300	2,500
Gwynedd	8,900	8,800	9,300
Conwy	7,000	7,000	7,200
Denbighshire	9,700	9,900	10,600
Flintshire	4,500	4,800	4,800
Wrexham	10,700	11,000	11,200
NORTH WALES	43,400	43,800	45,600

Source: NOMIS - BRES

CURRENT & FUTURE DEMAND LED PROJECTS

£3.9M

WELSH GOVT FUNDED INTEGRATED HEALTH AND SOCIAL CARE CENTRE IN BLAENAU FFESTINIOG

£5M

WELSH GOVT FUNDED REDEVELOPMENT AND NEW SERVICES AT TYWYN HOSPITAL

£2M

NEW MINOR INJURIES UNIT OPENED AT LLANDUDNO HOSPITAL

£7M

NEW DEMENTIA CARE CENTRE OPENED BY PENDINE PARK IN CAERNARFON

£1.4M

TOWARDS NEW SUB REGIONAL NEONATAL INTENSIVE CARE CENTRE FOR NORTH WALES

£5M

NEW INTEGRATED HEALTH CENTRE TO OPEN IN FLINT IN 2017

As the largest employer within this sector across North Wales, BCHUB is looking at new ways of working and how workforce modernisation over the next three years with the ability to attract new recruits is one of the biggest challenges facing the organisation.

BCUHB has already commenced work on its 'Recruitment Attraction' strategy which has outlined a range of initiatives that the Health Board will take forward in achieving its aim of attracting, recruiting and retaining a workforce with the requisite skills, within an environment which supports both professional development and flexible and healthy working practices.

Improved recruitment and promotion of career pathways within the sector to young people in North Wales should be increased and promoted also, as a recent Careers Wales survey of Year 10 students highlighted that 10.2% (548) young people indicated that personal care or social work and welfare was one of their top 4 career choices, and 1.6% (87) of the total surveyed indicated that personal care or social work and welfare was their first career choice.

The tourism and hospitality sector continues to be a key contributor to the economy within North Wales, and with increased investment and expansion forecast with a move away from seasonal only offers to one which is more of a permanent, year round suite of attractions, is identified as one of the growth sectors for employment and skills across the region within the Plan.

£1.8M

GENERATED BY TOURISM & HOSPITALITY SECTOR FOR THE NORTH WALES ECONOMY ANNUALLY

37,000

PEOPLE EMPLOYED WITHIN THE SECTOR ACROSS NORTH WALES

3,340

TOURISM BASED BUSINESSES CURRENTLY OPERATING ACROSS NORTH WALES

North Wales accounts for a third of all tourism within Wales, and the growth of the Outdoor Tourism sector particularly, has seen the sector generally refocus and realign to capitalise on the opportunities these new attractions now bring.

Analysis within the Regional Skills & Employment Plan for North Wales in 2015 identified growth of 3,000 new jobs within the sector over the next 5-10 years based on continued developments in line with current estimates. This figure remains consistent as growth in North Wales is expected to continue to outperform other areas in Wales.

The continued expansion requires investment in skills and training if the sector in general is to move away from a baseline of seasonality for its employment, and begin to further promote and target sustainable career pathways and opportunities for current and future staffing within the sector.

Whilst North Wales has long been an established tourism destination which has allowed the hospitality industry to respond and meet the needs of the increasing number of visitors, its previous dependence on seasons, has resulted in a lack of higher level qualified staff attracted to a career within the sector in North Wales.

The seasonality and temporary nature of many public facing roles and responsibilities at businesses across this sector, has also seen a lack of further investment in the softer skills required by employers, and expected from customers.

570

WORK BASED LEARNING APPRENTICESHIPS IN HOSPITALITY IN 2014-15

170

WORK BASED LEARNING APPRENTICESHIPS IN LEISURE IN 2014-15

4,580

LEARNING ACTIVITIES IN TOURISM, LEISURE & CATERING ACROSS NORTH WALES IN 2014-15

Whilst there has been a steady increase in the level 2 and 3 apprenticeships within this broad sector, the region does not have a significant offer of level 4 provision.

The NWEAB Skills report for the outdoor tourism industry in North Wales in 2015, found that there was a lack of coordinated approach to outdoor tourism qualifications and that the contents of many of the courses offered, did not fully prepare candidates for the roles in the workplace as they did not include the specialised leadership certificates and experiences required within key areas of the sector.



Consultation and feedback from industry specialists, such as Paul Donovan, Chair of Wales Adventure Tourism Organisation and the Outdoor Tourism sector in North Wales, suggests that a greater understanding of what apprenticeships really are and what they offer, is required. Equally, the content of the apprenticeship must reflect the needs of the sector and be allowed a degree of flexibility to accommodate the many variables that exist, particularly in the outdoor sector. E.g. regardless of how good an apprentice is when they complete their apprenticeship, if they have not achieved two or three NGB qualifications, as a minimum, they are unlikely to gain meaningful employment. NGBs are therefore vital to an apprentice's future.

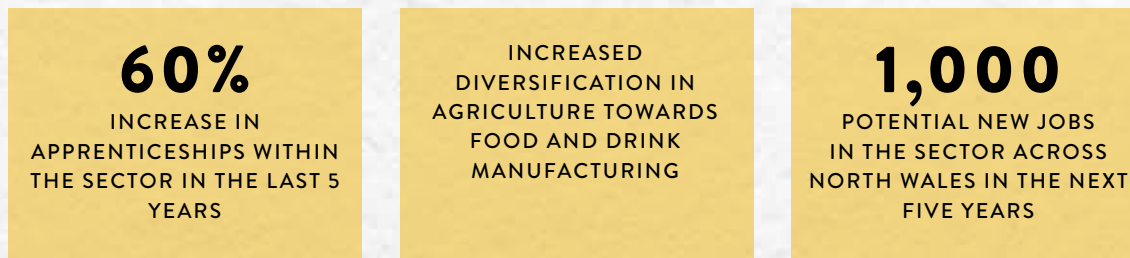
During the last 3 years, whilst the sector has been expanding as an industry in North Wales, with specific emphasis on outdoor tourism, and investment from the European funding streams amongst others, there has been a decline in the number of young people who start an apprenticeship for this sector, in addition to work based learning opportunities also seeing a decrease of 11%. This will need to be reversed if we as a region are to remain competitive with a competent hard and soft skilled labour supply to meet increasing demand and expansion of the sector.

From the annual survey of Year 10 students across Wales undertaken by Careers Wales, of the 5,398 respondents across North Wales, 21.4 % (1,153) indicated that leisure, sports and tourism work was one of their top 4 career choices, with 42% of these young people saying it was their first career choice. This was the highest ranking first choice amongst a list of 29 sectors.

The challenge for the sector is how to further capitalise on the growth of year round facilities and attractions especially within the outdoor and adventure tourism sub-sector, which act as 'hooks' for other sub-sectors such as hospitality. The skills requirements across the sector are varied, with specialisms needed and required for key areas such as mountain climbing, kayaking, and caving amongst others.

However, in line with other key and growth sectors, employers require their new staff to demonstrate work-ready and soft skills prior to appointment, and the education sector is encouraged to make closer alignments with the sector generally, building on the work of FE providers within the region who already providing vocational learning support to 14-16 year olds within catering and hospitality.

The food and drink sector continues to be a key contributor to the economy within North Wales, and with increased investment and expansion forecast, is identified as one of the growth sectors for employment and skills across the region within the Plan.



As a region, North Wales has a higher than national average figure for those employed within the sector compared to the rest of Wales.

The majority of enterprises within this growth sector is also increasing year on year, as diversification from those within the traditional agricultural sector, alongside other independent entrepreneurs sees a year on year increase for the overall sector.

Changes within the agriculture sector particularly have seen increasing diversification into tourism and accommodation sub-sectors, with food and drink manufacturing being a key component. This has seen North Wales producers at a micro business and SME level, benefit from an increasing demand for premium products which are locally sourced and produced. The continued demand from customers will require further consideration of expansion for many producers, and therefore specific skills demands to meet market requirements.

Our education partners have continued to support food producers within the region via facilities such as Glynllifon near Caernarfon, and the proposed Food Development Centre at Wrexham. Both Grwp Llandrillo Menai and Coleg Cambria provide existing support tailored to meet employers' skills demands such as developing their staff in Levels 2 & 3 awards, certificates, diplomas, and apprenticeships. This is in addition to tailored short courses and the development of a greater focus on food manufacturing and technology, and guidance to help advance the further skills needed to promote and develop closer supply chain links between food producers and processors.

In 2014-15, the Food Technology Centre at Llangefni attracted £770,000 of income, much of which was in response to meeting demands from commercial work undertaken to support skills both at the centre, and on employer premises, in addition to funding from the Rural Development Programme.

Expansion to meet demands of the sector has already seen global recognition for producers within North Wales, with Halen Mon from Anglesey and Henllan Bakery from Denbighshire just two examples of companies exporting their goods outside of the UK. With increased market recognition and demand, there is now an increasing demand on skills within the sector to meet both the demands of the market, and also demands within food technology and manufacturing.

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Recent innovative partnerships in the region such as Gr p Llandrillo Menai's Glynllifon campus partnership with the award winning Patchwork Pate Company, and Coleg Cambria's ongoing work supporting training and development with Rowan Foods, are only two examples of existing support for the sector that can provide the basis for further skills developments as sectoral demands increase.

There has been expansion at several companies during the last 3 years within North Wales, one of which is the frozen ready meal manufacturers, KK Fine Foods who are creating 100 additional jobs in 2016 as a result of an investment of £833,000 to expand their site in Deeside.

The Village Bakery have also submitted a planning application to Wrexham County Borough Council for a £16million 'super-bakery'. If permission is granted, the 215,000 sq ft facility - the size of three football pitches - will be built on land next to their two existing bakeries on Wrexham Industrial Estate, and create the extra capacity required. The number of people employed by the Village Bakery has doubled over the past two years to around 400 as it was named Wales' fastest growing company in 2013 and the fastest growing manufacturer in 2015.



Challenges facing the sector include demands on capacity for expansion based on the investment needed in the skills of the existing production workforce, in addition to the skills required to support technology for product development

With advances in food technology and innovation to maintain and develop further market share, consideration may be needed within the Higher Education sector to understand how they could support higher level skills within the sector, complimenting those already supported by Further Education. Although there are no specific courses aimed at the food technology or manufacturing industries at the Universities in North Wales, courses such as Chemistry and Nanotechnology are degree subjects currently offered, that are related in part to the food technology industries, and could be further modified and marketed as such to help address future skills needs.

Attraction of young people into the industry as a sustainable career development pathway needs further promotion, with a greater awareness of the careers opportunities via STEM related subjects to enter roles such as food technicians, engineers, and technologists - all of which are increasingly required within the sector.

Producers such as Glanbia Cheese, and Vion Foods in Anglesey; South Caernarfon Creameries & Purple Moose Brewery in Gwynedd; Blas ar Fwyd in Conwy, and Llaeth y Llan in Denbighshire, alongside international producers such as Kelloggs in Wrexham; are all seeing further developments in production which require upskilling of existing staff, alongside recruitment of new staff. An example of developments to support this demand include the recent £4million new baking academy and innovation centre established in Wrexham which provides the facilities to help train the next generation of craftsman bakers.

The growing trend in regional food and drink festivals (of which that held at Conwy is one of the longest established and largest in the region) is a way of showcasing the wealth and breadth of talented self-employment, entrepreneurs and micro businesses in the region's food and drink sector. They also serve as growth opportunities to promote business to business networking, and career development and recruitment, securing future work within the supply chains for regional, national, and international tourism, hotel and catering sectors and their increasing demands for competitively priced high-end quality products, produced by regionally skilled labour and talent.

North Wales has a supply of labour that is skilled, mobile, and aging. With two positives and one potential negative, we should continue to act collectively as a region to address the upskilling needed of our current workforce, in order that they remain currently qualified and technically competent; whilst also exposing our future talent of younger replacement workforce supply, to specific industry and workplace requirements alongside their academic, technical, and vocational qualifications to enhance their basic, soft and hard skills.

North Wales needs a system of qualifications that works in the labour market. Whilst our education providers at all levels do well to continue to develop a curriculum to meet current and future aspirations, we must, through mechanisms such as an increased employer represented presence within the Regional Skills Partnership in North Wales, have experts from industry to help determine the knowledge, skills, and methods of assessment that should be considered as appropriate, for relevant qualifications that provide a pathway into employment within our regionally transformative projects such as Wylfa Newydd, and our key regional economic sectors such as energy, manufacturing, and construction.

To aid our future supply of skills within the North Wales labour market in each of our key and growth sectors, we need a consistency and coordination regionally to work experience that also enables high-quality work placements to be considered compulsory for every technical qualification. Although there are local examples of best practice across North Wales, there is no consistency, and therefore having this collective regional approach coordinated by partners within the RSP, will assist our future labour market to gain both technical knowledge and practical skills, and ultimately sustain and grow our pool of talent.

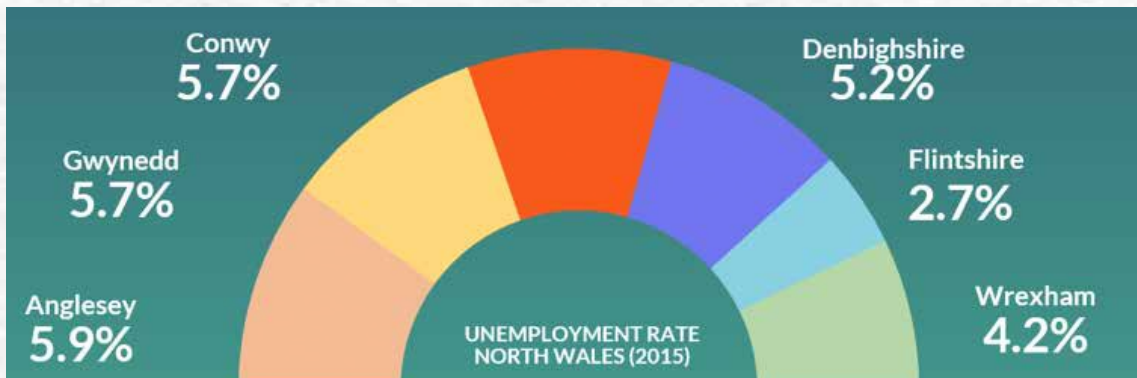
With clear and valid pathways to skilled employment, it will provide further opportunities for our young people to gain the skills which will enable them to get better paid and more secure jobs, as we are likely to see an even greater level in the mobility of skills and employment in North Wales within our labour supply in the next 5 -10 years.

We also need to consider increased technology impacting on the location of our labour market, with a forecasted increase in home based working, in addition to the inward and outward migration of labour that may impact the region following the recent Brexit decision.





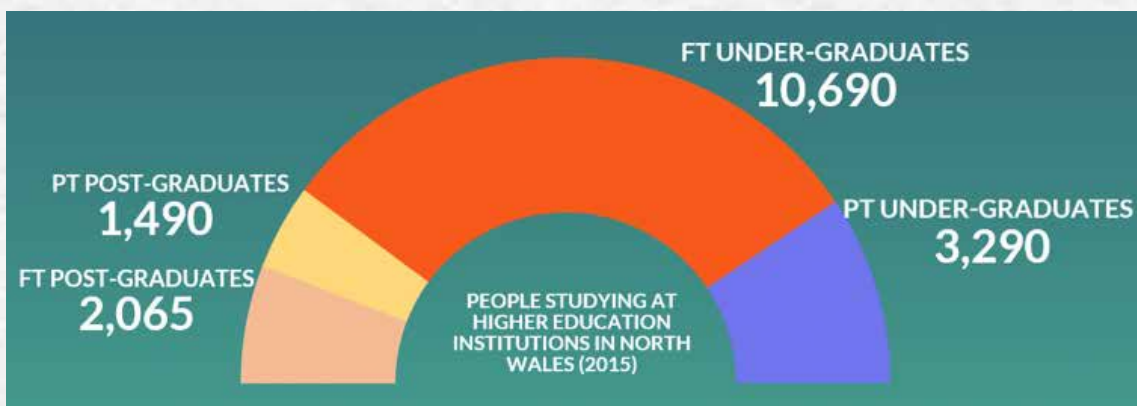
The results above show that those in the working age population with no qualifications continues to fall, from the result of 8.1% in 2013 published in the previous Regional Plan, to 7.6% in 2015. However, this still equates to 33,000 individuals without qualifications across all of North Wales. The movement towards a more qualified working age population and labour market continues at all levels within the table above, but particularly within the bracket of those qualified with a level 4 and above. The previous result for 2013 of 33.9% regionally, has now moved upward to 36.3% and continues the trend of exceeding the national Welsh average in terms of a qualified regional workforce.



The unemployment rate for both males and females aged 16-64 has also fallen between 2014 and 2015. The percentage of males unemployed within this age bracket fell from 6.6% (11,000) in 2014 to 5.3% (8,800) in 2015; and for females in the same age bracket, from 4.7% (6,900) to 4.4% (6,600).

At a county level, Anglesey had the highest percentage of males unemployed in 2015 with 7.2% (1,300) of those aged 16-64 compared to 6.2% (1,000) in 2014. Females in Conwy also saw an increase in the percentage of those unemployed, rising from 3.5% (1,200) in 2014 to 6.6% (1,600) in 2015.

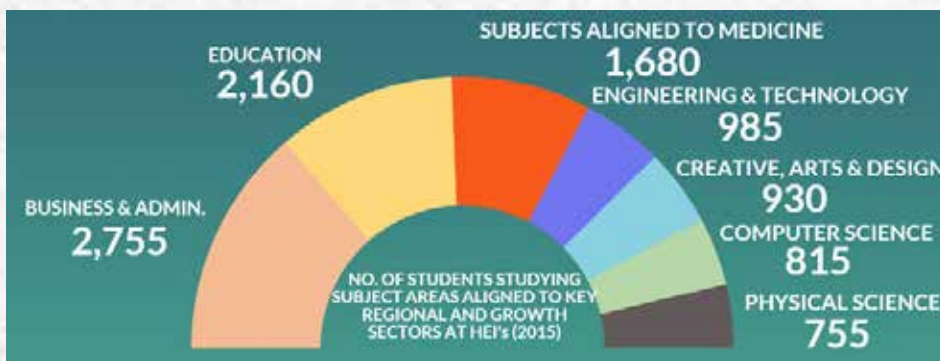
Schemes run by third sector organisations, the trade unions and private sector training providers are all critical in assisting those currently removed from, or at risk within, the labour market, to upskill and improve their potential aspirations and mobility of skills. Those especially who are economically inactive aged over 25 need coordinated initiatives at a regional and national level to address multiple and often complex barriers to employment. Regional projects such as OPUS will be key to addressing these and supporting individuals with appropriate skills and employment opportunities.



Within North Wales based on our two largest HE providers, 49.65% of all students enrolled are within their first year of study, with the local figures being 48.67% for Bangor, and 51.21% for Glyndwr.

SUPPLY NORTH WALES

The percentage of undergraduates combined within the two main HE providers of all students is 79.74%, and for post graduates regionally, the figure is 20.27%. Within Bangor the percentage for total under graduates studying there is 75.29% and post graduates is 24.70%. For Glyndwr the percentage for total under graduates studying there is 86.84%, and for post graduates is 13.22%.



Overall statistics released by HESA in July 2016 for the academic year 2014-15, report that the employability rate of UK domiciled leavers with first degrees going into employment generally, was a benchmark figure of 94.3% for Bangor and 93.5% for Wrexham Glyndwr University, both of which are above the 93% figure reported by HESA for Aberystwyth University.

Wrexham Glyndwr is committed to growing its full-time UK/EU undergraduate student numbers to at least 5,400 by 2019/20, and prior to the announcement on BREXIT, its full-time international student numbers at Wrexham to at least 10% of full-time student population by 2019/20. Whilst recent implications include a drop of numbers of international students at Aberystwyth, it is yet to be seen if this will affect institutions within North Wales.

Wrexham Glyndwr University offers a range of undergraduate programmes offered on its main campus in Wrexham which are relevant for key industry sectors identified in this plan, such as advanced manufacturing and engineering, financial services, the health sector, the food and drinks industry and creative industries. The university is networked into the Advanced Manufacturing Research Centre (AMRC) through Optic Glyndwr at St Asaph Technology Park (optics engineering), and through the Composite Materials Centre at Broughton. The AMRC is a consortium involving major industrial players and universities across the North of England and North Wales.

The university also sees its Northop site as strategically important to its growth agenda. As a well-placed site with direct transport links onto the A55 corridor it has significant potential to form the 'education gateway to North Wales'. As part of the development of a university wide Estates Strategy, it is planning to work with key stakeholder groups to scope out the potential options to develop the site, with an overall aim to grow educational programmes that directly match the skills agenda locally, regionally and nationally. Working in partnership to develop this site, it has the potential to help drive economic growth, enhance supply chain opportunities and provide space for growing or developing businesses as well as bespoke education programmes that respond to the skills shortages and growth agenda both regionally in North East Wales, and the wider pan-North Wales region.

77% of Bangor University's research output has been independently judged as "internationally excellent" or "world leading" with the University ranked 39th in the UK (excluding specialist institutions and single-submission universities), in the 2014 Research Excellence Framework. Over half of Bangor's academic Schools have been ranked in the UK top 20 for quality of research. Bangor ranks 90th (and is the only Welsh University), in the Times Higher 2015 'Most International Universities' worldwide table, and is No1. in Wales for 'Student Satisfaction' for the second year running and ranks within the top 10 UK universities in the National Student Survey.



The recently completed Pontio Arts and Innovation Centre is an important new gateway for both businesses and the community to access events, expertise and facilities available at the University. It provides a focal point for innovation in science, technology and the creative arts and provides further support for key aspects of the regional STEM agenda.

The University is a member of the Santander Universities network, which brings with it funding for e.g. internships and placements for students within businesses to work on projects which both meet business needs and help the student develop employability and entrepreneurial skills. Bangor University also leads on Wales's KESS (The Knowledge Economy Skills Scholarships), programme, to develop post-graduate research and innovation skills, in partnership with small and medium-sized businesses (at Masters and PhD levels), by placing postgraduate students within those businesses to work on business specific tasks, problems and issues.

The University also has Memoranda of Understanding with strategic regional partners, such as Horizon Nuclear Power and Siemens Healthineers which, alongside collaborative research objectives, seek to support the regional skills agenda through both the development of long term graduate retention and employment in North Wales as well as collaboration on educational engagement linked to promoting and raising awareness of the importance of STEM amongst young people.

94.3%

OF BANGOR UNIVERSITY'S
UK DOMICILED LEAVERS
WITH 1ST DEGREE GO INTO
EMPLOYMENT

15%

OF GRADUATES FROM
WREXHAM GLYNDWR
UNIVERSITY WENT INTO
MANUFACTURING

54%

OF ALL STUDENTS IN
HIGHER EDUCATION
INSTITUTIONS IN NORTH
WALES ARE FEMALE

The largest number of enrolments regionally is for subjects within the biological sciences, followed by 'Business & Administrative Studies' and also 'Education' and 'Subjects aligned to medicine'.

Students from Wales currently pay £3,810 towards their tuition fees, wherever they study in the UK. The rest, up to £5,190 a year, is paid for by the Welsh Government. It is a policy which saddles Welsh students with less debt than their English counterparts but meant an investment nationally of £238m in 2014/15 much of which goes over the border. Need to consider how employer demand led activities can be greater integrated into higher education to retain students within employment regionally post completion of their studies.

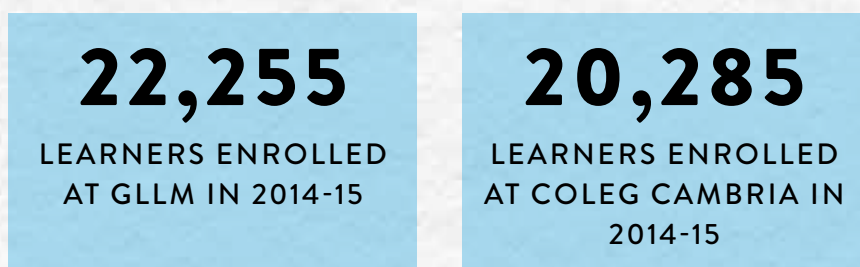
Further education partners within North Wales have also been extending their higher education provision. This includes Coleg Cambria in partnership with Swansea University operating a HE Centre from Deeside in response to a need to support higher level skills in the aerospace sector. GLLM recently completing work on their University Centre at the Rhos Campus in partnership with Bangor University. A recent national assessment of HE provision at GLLM concluded that out of 62 FE colleges reviewed throughout the UK, GLLM are one of only 4 who achieved a commended judgment for "the enhancement of student learning opportunities".

SUPPLY NORTH WALES

Increased promotion and encouragement by some national bodies for Welsh students to remain in Wales to study higher education has seen 37.84% (4,074) of all enrolments come from within Wales to study at Bangor, and 54.83% (3,456) for the same cohort at Wrexham Glyndwr during 2014-15.

For the same time period, Bangor continues to attract a large proportion of its student population from outside of Wales, with 39.47% (4,250) coming from England and 17.71% (1,907) internationally from non-EU countries. Wrexham Glyndwr attracts 22.53% (1,420) of its student population from England, and 14.82% (934) internationally from non-EU countries.

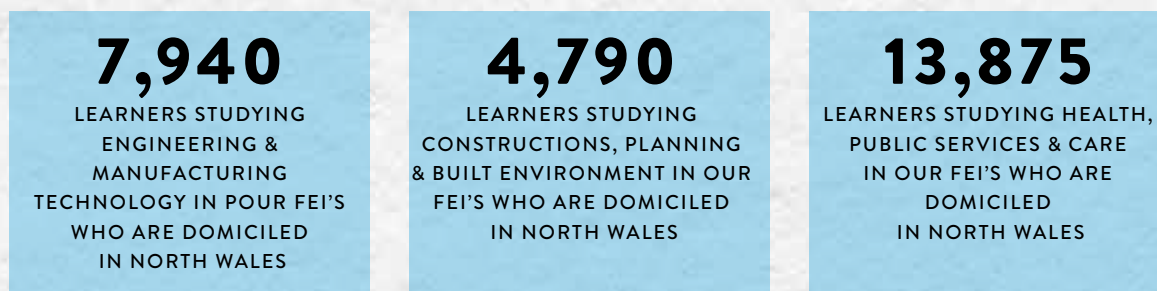
North Wales is home to two of the largest further education providers in Wales with Grwp Llandrillo Menai based in the west of the region, and Coleg Cambria based in the east of the region.



Grwp Llandrillo Menai during 2014-15 opened a new Construction & Engineering Hub in Dolgellau; secured Welsh Government funding for extending a centre of excellence at Llangefni to support the energy sector developments including Wylfa Newydd, and progressed working relationships with Horizon Nuclear and Lockheed Martin to develop training; and seen student successes include representation at the World Skills global championship in Sao Paulo in Brazil.

Coleg Cambria during 2014-15 received an 'excellent' judgement from Estyn inspectors based on success rates for substantial courses, the use of technology to support learning, and the range of partnerships used to support the college are extensive; the college maintains and develops close links with employers - particularly within the Deeside Enterprise Zone; and student success also sees five students become part of the UK squad for the World Skills 2017 final in Abu Dhabi.

Number of enrolments in FEIs across Wales decreased by 19,000 between 2013-14 and 2014-15. The number of enrolments at GLLM fell by 3,235 during this time, and in Coleg Cambria, by 1,035.



Whilst the above numbers of learners highlighted for manufacturing, construction, and care reflects studies to some of the regions economic key and growth sectors, large numbers of students within further education in North Wales continue to pursue courses in retail (9,505 learners), business administration & law (9,850), and arts, media & publishing (5,345).



86%

SUCCESS RATE FOR BOTH GLLM & CAMBRIA STUDENT IN CONSTRUCTION - ABOVE NATIONAL AVERAGE OF 82%

84%

SUCCESS RATE FOR CAMBRIA STUDENTS IN ENGINEERING & MANUFACTURING - ABOVE NATIONAL AVERAGE OF 79%

91%

SUCCESS RATE FOR GLLM STUDENTS IN LANGUAGE & CULTURE - ABOVE NATIONAL AVERAGE OF 88%

Both FE colleges within the region will find it increasingly challenging to attract further students to their well-established construction and engineering related courses to meet future opportunities. This is a result of both students and their parents being resistant to move forward until they too see confirmation of opportunities from proposed projects such as Wylfa Newydd becoming a reality.

Whilst the FE sector has positive working relationships with key project holders, further delays in the publicising and sharing of skills requirements and job role expectations from our key transformational and infrastructure projects within the region, may harm the construction sector in North Wales in relation to its skills capacity and competitiveness to respond effectively.

Without clear timings and volumes of roles and skills requirements from developers by the end of 2016, it will be increasingly difficult to effectively plan a curriculum that promotes skills developments and opportunities within the sector based on transparency of career pathways, particularly when we have seen a decrease in the total number of students across North Wales registering for construction based courses.

In 2014/15, there were 3,065 learning activities relating to construction and property (built environment) in further education in North Wales. The majority, 1,080, were at NQF level 2; less than 5 were at entry level; 940 were at level 1; 525 were at level 3; and 10 at level 4. This is a decrease from 4,150 in 2013/14, 1,430 of which were at level 1, 1,570 at level 2, 715 at level 3 and 45 at level 4. In 2012/13 there were 4,955 activities.

Recent experience based on the North Wales Prison model at Wrexham of FE partners working with developers and sub-contractors via the NWEAB Learning & Ambition Academy on-site has proved invaluable – providing students and lecturers with experience of, and direct programmed access to the largest building site currently in Wales. The additional exposure to modern building practices and project management has positively contributed towards their technical and practical skills prior to award of qualification which helps them progress to apprenticeships or employment directly. The work in collaboration between NWEAB partners and the project contractors, Lend Lease, has been recognised with a national Construction Excellence Award for ‘Leadership and People Development’.

Future developments including the Advanced Manufacturing Skills & Technology Centre in Deeside, and the expansion of the Energy Centre in Llangefni will further enhance tailored FE provision in line with our regional key economic sectors. Investment in new flagship regional facilities and resources is needed within North Wales if we are to effectively attract, develop, and retain the talent and skills needed to deliver the supply demanded by transformation projects and employers within the associated supply chains. It will also have the longer term sustainable outcome of having a skilled workforce within nationally recognised hubs of excellence that will further promote and grow our economy.

New Welsh Baccalaureate to enable learners to develop and demonstrate proficiency in essential and employability skills

North Wales to become part of MIT’s Regional Entrepreneurship Accelerate Programme (REAP) that puts entrepreneurship at the heart of the drive to create jobs and boost the Welsh economy

There are different offers both nationally and regionally to help support young people, and particularly those at risk of distancing themselves from the labour supply in future years.

Within North Wales we have via regional working through the RSP seen a stronger single regional approach in the development of appropriate skills focused projects for young people such as “TRAC 11-24” and “AD-TRAC” which focuses on those aged 16-24; both of which replace at a regional level, numerous locally focused projects which diluted delivery to small geographies and did not share resources and knowledge to the benefit of the clients.

Employers increasingly value young entrants into the labour market having the appropriate ‘soft skills’, although not all employers are investing in the support needed to promote and supply these.

86%

OF FSB MEMBERS CITED
THE IMPORTANCE OF WORK
EXPERIENCE AS A FACTOR
IN MAKING RECRUITMENT
DECISIONS

Employers represented in North Wales by both the Federation of Small Businesses and the North Wales Business Council, all agree that high-quality independent careers advice is vitally important, especially as participation rates in vocational pathways are rising.

Employers believe that schools should better promote vocational routes, such as apprenticeships and traineeships, alongside academic study. This should occur before reaching the age of 16 to give pupils and parents time to consider appropriately.

Changes nationally to the remit of Careers Wales have seen clear changes to the service offered and delivered within North Wales. We should now seize the opportunity in North Wales to work with Careers Wales within their new remit, alongside other partners to inspire our future labour supply, and develop a regional approach to careers information advice and guidance from a range of different partners and stakeholders, including vocational training providers. Using the previous experience of Careers Wales colleagues still employed in North Wales, they can work with RSP partners within the region to steer the delivery of a “North Wales Toolkit of Employability Skills” and a regional approach to supporting pathways into STEM related careers and employment opportunities.

The support provided for teachers and tutors in awareness raising of regional economic opportunities and their links to the curriculum will be critical to raising awareness and educating young people. Many employers cite the lack of awareness or understanding of teachers of the business world as a challenge to their future recruitment, and regionally we need to support closer alignment of employers and teachers through a structured programme of activities and upskilling.

The supply of a future labour market with greater workplace experience and a broad range of softer skills in addition to qualifications has already been noted within this Plan.



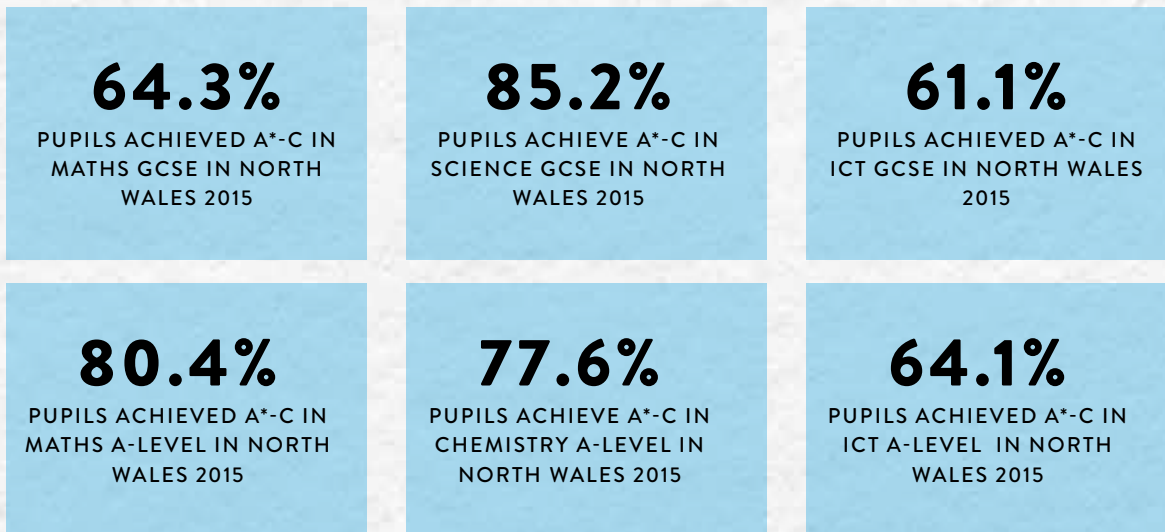
Further investment within careers advice and guidance in North Wales is required to further support Careers Wales provision alongside bespoke offerings from education providers to aid regional consistency. Development of a potential cross-border careers deliver greater consistency and mobility of our skills supply to meet demands

The additional challenge for the region is to promote the increase in those studying STEM subjects to meet the needs of key sectors such as Energy, Manufacturing and Construction, in addition to the STEM competencies increasingly required in our growth sectors such as Health & Social Care, Creative and Digital, Food & Drink, as well as growing elements of the Tourism industry.



Previous research commissioned by the RSP within the NWEAB on STEM activities within schools across North Wales highlighted the lack of coordination and infrequency of delivery, particularly at primary level. If there is to be a robust and transparent 'pipeline' approach to STEM that also addresses gender inequality within STEM subjects later on, then a regional approach that is meaningful and sustainable, coordinated using the RSP and a dedicated STEM officer resource is needed and necessary.

STEM SUBJECTS REGIONAL ATTAINMENT



As part of the Youth Engagement and Progression Framework (YEPF), all local authorities in Wales were required to produce a baseline map of provision for those aged 16-24 who are at risk of disengaging from education, employment and training; this information being used to then inform the Youth Guarantee.

Within North Wales the Engagement and Progression Coordinators' (EPC's) have worked with support from the RSP of the NWEAB to undertake further analysis of provision to understand the provision offered to support our future labour supply who are currently removed from traditional pathways into employment and further training. Initial conclusions from this work appear to be that we need consistency of approach across North Wales, and the voice of the young person needs greater definition, with the potential to use National Apprenticeship Week as a key opportunity to highlight the need for further support for 16-24 year olds who are at risk from disengaging from our future labour market.

Further analysis suggests that employment and training for our future supply of labour within this cohort of young people aged 16-24 at risk of becoming "NEET", is predominantly offered within creative, catering and hospitality, construction and farming industries. However, whilst previously there was widespread duplication in services providing softer outcomes for young people that are currently not work-ready, there are now in place EU funded regional projects including AD-TRAC and OPUS currently at final business planning stage. They will identify appropriate early intervention services, and work toward addressing gaps in provision and support for people who need more help with mental health issues, and complex employment barriers.



Greater consistency of approach within the region is needed to support young people at risk of disengaging from education, employment and training. The voice of the young person needs greater presence in how we should be supporting and more closely aligning the work of 14-19, EPS's, ACL, and other local projects in supporting vulnerable 16-24 years olds across North Wales

Acknowledging that new apprentice priorities have been announced by Welsh Government for those aged 16-19, and 20 plus, which has no restriction to the length of employment for higher apprentices, the total number of apprentices in 2014-15 fell across North Wales in comparison to the previous year, due to age restrictions. Whilst there was a decrease in those within the age 16 -19 cohort, this could be attributed partly to a high percentage of young people remaining in education at age 16, particularly within north west Wales, and so the apprenticeship demand will tend to attract learners over the age of 18/19.

5,565

FEMALE APPRENTICES IN
NORTH WALES IN 2014-15
COMPARED TO 6.710 IN
2014-14

4,190

MALE APPRENTICES ACROSS
NORTH WALES IN 2014-15
COMPARED TO 4.795 IN
2013-14

9,755

TOTAL APPRENTICES IN
NORTH WALES | 2-14-15
COMPARED TO 11.460 IN
2013-14

There was an increase during 2014-15 in the number of people aged 20-24 going forward with apprenticeships – from a figure of 2,800 in 2013-14, to 2,955 in 2014-15. This trend mirrors the recent Welsh Government commitment to increase the number of apprenticeships at all ages, with North Wales employers and providers already working collectively towards delivery on this commitment.

Despite funding being prioritised for apprenticeships for the 16-24 age group, there has not been a significant increase in apprenticeships numbers in those age groups during the previous three years. Further details and analysis can be found in Appendix 1 to the Plan.

**SCHOOLS SHOULD DO
MORE TO PROMOTE AND
UNDERSTAND THE VALUE
OF APPRENTICESHIPS TO
PUPILS AND THEIR PARENTS**

**GRADUATE
APPRENTICESHIP SCHEMES
NEED BETTER PROMOTION
ALIGNED TO OUR REGIONAL
KEY PRIORITY AREAS**

**HIGHER LEVELS
APPRENTICESHIPS
CONTINUE TO RISE WITHIN
NORTH WALES BETWEEN
2013-14 AND 2014-15**

The importance of Higher Level apprenticeships should not be underestimated for sectors such as construction as well as manufacturing, if we are to develop a curriculum which meets regional needs and economic aspirations, offering existing employees particularly the opportunity to further develop the additional skills they require within the workplace.

Many of our larger employers within the region offer apprenticeship programmes, with flagship schemes offered by companies such as Airbus offering a potential 75 craft apprenticeships and 30 under graduate apprenticeships, from September 2016, in addition to direct entry graduate opportunities. Lend Lease who are responsible for the construction of the North Wales Prison project (HMP Berwyn) have committed to creating 100 apprenticeships by completion of the project in Autumn 2017; current figures showing that almost 50 apprenticeships have been created so far.

Other companies including TATA Steel at Shotton, which is one of the most profitable steel plants within the UK, continue to promote and develop apprenticeship opportunities, with 8 specific engineering apprenticeship opportunities being offered in 2016. Construction companies such as Jones Brothers continue to promote and encourage apprenticeships within both general construction and plant machinery operations at their own accredited training centre in North Wales.



Smaller supply chain companies within the region continue to also support the opportunity and promotion of apprenticeships. However, there is a growing need to engage with smaller micro businesses to encourage them to consider the benefits of taking on an apprentice to support their business. Many of our smaller ICT and Digital companies have already begun to see this benefit, and this further assists the development of this growth sector for the region.

Private training providers are also a strong delivery arm for apprenticeships and work based learning support across North Wales, working with employers and individuals to support staff development from operative to management level. Many private training providers within North Wales specialise in our key economic and growth sectors and industries, and help address retention issues and preparation; and are also collectively members of the National Training Federation for Wales (NTFW) which is the representative body for all those organisations or individuals involved in the training industry, working closely with the RSP in North Wales, FE providers, and Welsh Government amongst others.



Support for ongoing learning within the workplace is a critical component to maintaining our competitive advantage as a region in terms of skills supply and should be expanded. Whilst considerable focus is often placed on our future skills, we also need to maintain, develop and grow our existing labour market to address succession planning, creation of opportunities for new entrants, and continued personal growth and development.

The top five sectors and areas of activity currently in 2014-15 within North Wales for delivering work based learning activities to individuals are:



Those listed above are closely followed by areas including construction, engineering, catering & hospitality, health & safety, and retail sales & marketing. Work based learning is becoming increasingly important to help retention, but is also deemed necessary by many employers who still find issues with new recruits often not being sufficiently 'work-ready' when they leave education.

The issue of being 'work-ready' is something which DWP and Careers Wales amongst others, including the Third Sector, are working on addressing, in addition to other barriers to work for our supply of labour around specific areas such as digital skills, transport accessibility, and in some cases, language. The Third Sector particularly places value on face to face support and interaction where possible, to address personal capacity and skills issues directly, and to understand at source, client needs to then address and upskill to meet employer needs and demands as necessary.

Regional Outcome	Regional Measure	Source	2014	2015	
Supporting People	Number of JSA claimants	DWP/NWEO	→	→	
	Number of JSA claimants aged 17-24	DWP/NWEO	→	→	
	Number of JSA claimants claiming for over 12 months	DWP/NWEO	→	→	
	Percentage of working age people who are employees	ONS/NWEO	→	→	
	Percentage of working age people who are self employed	ONS/NWEO	→	→	
	Percentage of working age people who are economically inactive but want a job	ONS/NWEO	→	→	
	Number of workless households	WG/StatsWales	→	→	
	Number of workless households with children	WG/StatsWales	→	→	
	Supporting the Economy	Number of new businesses created within North Wales	WG/StatsWales	→	→
		Number of business closures within North Wales	WG/StatsWales	→	→
Number of people who are in full-time employment		WG/StatsWales	→	→	
Number of work based learning programmes		WG/StatsWales/NWEO	→	→	
Number of higher level apprenticeships (Level 4+)		WG/StatsWales/NWEO	→	→	
Number of apprenticeships (Level 3)		WG/StatsWales/NWEO	→	→	
Number of foundation level apprenticeships (Level 2)		WG/StatsWales/NWEO	→	→	
Percentage of local business units with 20 or more employees		ONS/NWEO	→	→	
Supporting the Region		Number of new business enquiries within the region	NWEAB	→	→
		Number of new business investments within the region	NWEAB	→	→
	Number of students in key subject areas aligned to regional priorities (FE)	WG/LLWR	→	→	
	Number of students in key subject areas aligned to regional priorities (HE)	HESA	→	→	
	Percentage of working age people with an NVQ Level 4+ or equivalent	ONS/NWEO	→	→	
	Percentage of working age people without any qualifications	ONS/NWEO	→	→	
	Average gross annual pay	ONS/NWEO	→	→	
	Average gross hourly pay	ONS/NWEO	→	→	

DWP - Department for Work & Pensions / NWEO - North Wales Economic Observatory / ONS - Office for National Statistics / WG - Welsh Government / LLWR - Lifelong Learning Wales Record / HESA - Higher Education Statistics Agency / NWEAB - North Wales Economic Ambition Board



REF.	RECOMMENDATION	PROCESS	DELIVERY TARGET	PROCESS
1.	Work with employers, developers and providers supporting key transformational projects within the energy sector such as Wylfa Newydd, Orthios, the Menai Science Park, and others, to deliver the necessary facilities and expertise to create aspiration, and equip local people with the knowledge, skills and aptitudes so that they can gain employment in the upcoming developments. This approach will support and promote local careers, economic growth and community growth for the current and future generations	<p>To further develop GLLM's Llangefni campus as a technology hub for the region with a new, modern, Engineering facility on the campus that augments the recent developments on the site - the Energy Centre and the Construction Centre</p> <p>Centralise current provision from other centres into the one regional hub which will see existing staff transferred and supported with appropriate sector specific skills developments</p> <p>Recruitment of additional lecturers and trainers with relevant nuclear experience and knowledge, to meet needs and respond to the growth - including the Horizon Apprentices</p> <p>Further mapping to identify how that whilst this Hub development does not bring with it major job opportunities, it is a pre-cursor of developments that, subject to commercial decisions, could result in additional capital developments and significant high skilled job opportunities in North Wales</p> <p>Continued development of Bangor University Nuclear Skills & Research Programme to support operational higher level skills pathways within North Wales</p>	<p>August 2018</p> <p>-----</p> <p>September 2017</p> <p>-----</p> <p>April 2017</p> <p>-----</p> <p>Ongoing</p>	<p>GLLM / NWEAB</p> <p>BANGOR UNI</p>
2.	Work with employers, developers and providers supporting the Manufacturing sector which is identified as a key economic sector for North Wales, to further expand and support the development of the necessary facilities and expertise to inspire and equip local people with the knowledge, skills and aptitudes so that we can further develop our labour force, remain competitive as a region with a greater concentration of higher level skills, and support the general concentration of expertise in key locations across the region such as the Deeside Enterprise Zone and Wrexham Industrial Estate.	<p>To further support and develop the concept based on need for an Advanced Manufacturing Skills & Technology Centre at Deeside.</p> <p>Strengthen and promote the existing partnership between Welsh Government, HE & FE regional institutions, and private sector partners to deliver a facility for North Wales that will promote and supply higher level skills training and support advanced technology development and implementation to maintain and further grow this key sector for the regional and national economy.</p> <p>The development of this centre of excellence can strengthen further the links between businesses within this broad sector, and education providers across the region, to help further develop a higher skilled workforce, and also innovation and expansion amongst our employers within this sector.</p>	TBC	Cambria / NWEAB
3.	Develop closer alignment of the Regional Skills & Employment Plan with regional provider partner planning cycles, to help inform curriculum, resourcing and vision	<p>Mapping exercise of regional timelines for partners in the development of future curriculum and prospectus offers; business and resource planning; and routine cyclical regional and local policy interventions; to identify appropriate timescales for input into the development of the Regional Skills & Employment Plan to help inform, and also be informed & accurately representative of future skills needs from employer and participant perspectives.</p>	January 2017	RSP - all partners

RECOMMENDATIONS

<p>4.</p>	<p>Need to develop a common baseline approach to skills and employment brokerage, that can be then added to with bespoke needs and requirements as driven by the primary contractor/project owner for all applicable regional transformational projects</p>	<p>Using the existing successful model from the development of the North Wales Prison as a baseline of generic activities, to then add to and adapt as necessary.</p> <p>NWEAB/RSP to facilitate event for all current and future regional transformational projects to discuss a regional blueprint for a baseline regional skills and employment brokerage model for delivery by key partners such as DWP, Careers Wales, and LA leads alongside RSP partners.</p> <p>Launch of the regional online skills database which builds on the previous "Shaping the Future Project" to support workers from decommissioning at Magnox, to extend to all sectors within North Wales to support demand by retention of current skills in the region, attract new skills & investment, and appeal to those from North Wales who have moved away for applicable opportunities</p>	<p>November 2016 (for initial event)</p>	<p>NWEAB / RSP</p>
<p>5.</p>	<p>Develop a complementary North Wales approach to STEM that will help communicate, inspire and promote equality of opportunity, whilst clearly reflecting and supporting the needs of employers, learners, and providers at all levels</p>	<p>Recruit and appoint a regional STEM coordinator to work within the RSP/NWEAB central team. Main responsibility to support and promote coordination of STEM regional activities e.g. GLLM "CodSTEM" events, and the proposed "STEM Gogledd" project, for applicable audiences across the region.</p> <p>---</p> <p>Using existing regional mapping undertaken by NWEAB RSP, and its recommendations including the undertaking of quality assurance for STEM related activities; assessing alignment and complementarity to provider provision and employer demands; and to work with partners on the identification of appropriate capacity building of Welsh language specific STEM resources and role models to be used regionally.</p> <p>---</p> <p>Establish a dedicated STEM sub-group of the RSP to understand and recommend employer demands regarding STEM related activities and career pathways, and translating this to suggested activities for education and training providers at the RSP to address</p> <p>---</p> <p>Support the promotion of regional STEM hubs utilising existing and future centres of excellence within the region such as Techniquet in Wrexham, and the Menai Science Park in Anglesey as centres for activity and development with wider partners</p>	<p>December 2016</p> <p>-----</p> <p>May 2017</p> <p>-----</p> <p>November 2016</p> <p>-----</p>	<p>NWEAB / RS</p> <p>-----</p> <p>REGIONAL STEM</p>



RECOMMENDATIONS

REF.	RECOMMENDATION	PROCESS	DELIVERY TARGET	
6.	<p>Work with regional employers and employer representative bodies to develop a “North Wales Toolkit of Employability Skills” that would award an accredited single certification, collectively on behalf of regional education providers. Successful completion of the toolkit by participants would assist their meeting agreed labour market expectations and future employer demands within our key and growth sectors</p>	<p>Work with existing providers and businesses who are keen advocates of employability skills in the region, to map and address duplication and inconsistency of delivery, to develop a consistent baseline approach of regional expectations, that can also in addition promote specialisms where applicable in our key sectors such as Energy, Manufacturing and Construction and their applicable sub-sectors</p>	October 2016	RSP – all partners
7.	<p>Working with partners to consider appropriate sustainability and continuity of regional and national survey of employers views and needs following UKCES and its outputs being disbanded to help inform planning of future skills delivery in North Wales</p>	<p>Work with Welsh Government and employer representative bodies to identify a singular purpose and appropriate methods that promotes continuity of capturing North Wales employers views and requirements</p> <p>Develop a joint proposal between RSP partners and private sector employers representative bodies, to seek agreement and financial backing for this work from appropriate funding awarding body</p>	January 2017 ----- April 2017	WG / NWEAB / RSP ----- NWEAB / RS
8.	<p>To realise the impact and relevance of cross-cutting themes in relation to the Welsh Language and its relevance and impact on the wider skills and employment agenda within North Wales</p>	<p>Map and promote how the Welsh Language influences and informs key developments within the economy and deliverables of employers; promoting key benefits such as a bilingual workforce</p> <p>Integrate outputs and actions from existing recommendations within this Plan (such as on STEM) to provide clarity and avoid duplication to inform appropriate, relevant, and required Welsh language skills delivery within our economy</p>	April 2017	RSP – all partners
9.	<p>Develop a cross-border careers skills manifesto built around a single cross-border careers agency to promote the fluidity of skills and expertise that migrates between North Wales and North West England on a daily basis in relation to both our labour markets and those studying and learning</p>	<p>Build on existing informal relations and information sharing to develop a mutually agreed manifesto that sells the skills and employment opportunities of the wider M56 & A55 corridor (currently valued as a combined economic region of £35billion).</p> <p>Identify potential for a cross-border careers agency that uses and extends existing Careers Wales provision in the region with its counterpart in Cheshire and the Wirral to promote the aspirations identified within the NWEAB Growth Bid for North Wales, and the Cheshire and Wirral LEP City Deal.</p> <p>Extend the current North Wales Economic Observatory to include geographies in Cheshire and the Wirral where comparable data is available and relevant, to further inform and identify LMI to aid cross-border working on skills and employment issues</p>	February 2017 ----- September 2017 ----- November 2016	NWEAB / RSP / MDA / Cheshire & Wirral LEP / Careers Wales

RECOMMENDATIONS

10.	<p>Continue to increase collaboration and information sharing with other workstreams within the NWEAB to illustrate and promote a joined up approach between skills and employment with supply chains, infrastructure, inward investment, and cross-border relations that can be promoted and communicated to education providers and students via a singular collective approach</p>	<p>Continue to identify and promote cross-cutting areas of work and connectivity to support the wider regional economic agenda, and the NWEAB led Growth Bid for North Wales, that informs key audiences such as education providers, businesses, and the wider current and future labour market on their relevance to them</p>	Ongoing	NWEAB
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north wales economic ambition board
bwrdd uchelgais economaidd gogledd cymru