

NORTH WALES SKILLS AND EMPLOYMENT PLAN

2019-2022



Partneriaeth Sgiliau Rhanbarthol Gogledd Cymru
North Wales Regional Skills Partnership



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WELCOME...



It is a pleasure to present our new Skills and Employment Plan for North Wales 2019–2022. This is a three-year strategic Plan that will provide an insight into the supply and demand of the skills system in the region, and crucially, what employers are telling us are their needs and priorities. [This is the summary document, the full document is available from (<https://northwaleseab.co.uk/jobs-and-skills/regional-skills-partnership>)]

It is an exciting time for North Wales, with recent positive figures showing growth in our employment rate and productivity. Despite this positive trajectory, there are many challenges, uncertainties and opportunities that lie ahead. As a region, we need to ensure that our people and businesses are able to maximise opportunities that arise from the £1billion North Wales Growth Deal and technological changes, and minimise the impact of uncertainties with Brexit and the changing policy context.

Skills are fundamental to our continuing economic success. Increasingly, it is skills, not just qualifications that employers look for first. We need to make sure that the people of North Wales are equipped with the correct skills to get a job and progress in work, and that employers have the right skills is a key priority for the region.

We recognise that as a region we need to do more to improve the skills of our people by creating a better match between what our employers are looking for and what the system provides. This includes ensuring stronger links between industry and education, and enabling everyone to understand how the skills needs of our region are changing as the economy changes. Responding effectively to employers' skills needs and strengthening their role in the education and skills system is central, and will continue to be the cornerstone of the work of our North Wales Regional Skills Partnership.

We have focussed on building intelligence on the demand for skills at a regional and sectoral level, and encouraged employers to shape the solutions that will enhance North Wales' skills performance. As well as putting forward priorities in support of specific sectors, the Plan also sets out the key challenges that face us and what actions are needed to encourage a change in our skills system.

The North Wales Regional Skills Partnership (RSP) and its partners in the region are committed and will continue to get the North Wales skills system working harder and better at filling employers' skills gaps and equipping individuals with the skills that will enable them to secure jobs, now and in the future. As an established partnership with support from employers and providers, we collectively aim to create clearer, focussed pathways into employment.

We look forward to working with colleagues across the region to implement the collective ambitions set out in this Plan and create a skills system which underpins a strong, inclusive, and outward-looking economy.

David Roberts
Chair of North Wales Regional Skill Partnership

OUR VISION IS:

“To create an inclusive and outward looking skills system, which is agile, resilient and can adapt to opportunities and challenges in our region”

OUR PURPOSE & APPROACH

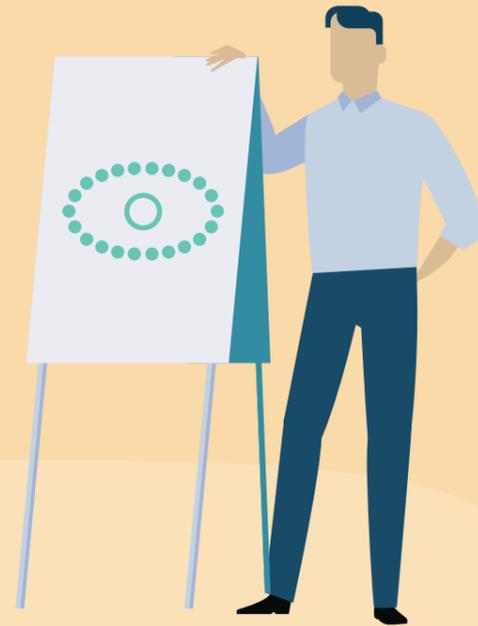
The three year 'Skills and Employment Plan' has been developed by the Regional Skills Partnership, in **collaboration with businesses** across the region, underpinned by a comprehensive review of **relevant intelligence and data** sources, set in the **wider strategic and policy context** and political, technological and societal **drivers** along with the current broader **economic and labour market context and skills landscape**.

The North Wales Regional Skills Partnership has been developed to inform Welsh Government's strategic approach to the delivery of skills and employment provision by identifying skills gaps and shortages in the region. It acts as a strategic body effectively representing regional interests to inform a demand-led and sustainable skills system, informed by strong industry engagement.

- ➔ 350 BUSINESSES ENGAGED
- ➔ SKILLS SURVEY (238 RESPONDENTS)
- ➔ FOCUS GROUPS AND CONSULTATION SESSIONS
- ➔ 1-1 INTERVIEWS
- ➔ INTELLIGENCE AND DATA SOURCES

OUR ROLE

The **North Wales Regional Skills Partnership (RSP)** has been given a key role by Welsh Government to help break the cycle of low skills, low wages and low productivity. The RSP **aims to tackle skills shortages** by influencing post 16 skills provision in North Wales based on labour market intelligence and employer-led insight



POLICY LANDSCAPE AND REGIONAL DRIVERS



WELSH GOVERNMENT STRATEGY AND POLICY DRIVERS

The skills landscape at a regional level is profoundly affected by decisions made by Government. The following sets out some of the policy and economic context in which the plan is set, highlighting some of the policy areas that directly affect our skills system.

Welsh Government's Prosperity for All: economic action plan

- ensure all individuals are equipped with the right skills for a changing world
- support business to take advantage of new approaches such as decarbonisation, automation, Artificial Intelligence, digitalisation
- innovation and fostering entrepreneurial culture

Wales Employability Delivery Plan (2018)

- reshaping employability support
- Job Support Wales Programme

Working Wales

- helping reduce the number of people who are unemployed or economically inactive

New Curriculum for Wales

- crucial building block in ensuring a future workforce
- improving standards of literacy and numeracy, digital and bilingual competency

Apprenticeship Plan

- aligning apprenticeships with the needs of the Welsh economy
- introduction of Degree apprenticeships
- clearer apprenticeship pathway progression routes

Taking Wales Forward 2016-2021

- all citizens deserve the opportunity to achieve their potential
- promotes adult learning to support skills development, health and wellbeing, social engagement and integration

Well-being and Future Generations Act 2015

- build a resilient North Wales
- promote growth in a scalable, inclusive and integrated way

CROSS CUTTING THEMES:

Across all policy areas of Welsh Government and our Skills Plan

Prosperity for All: A Low Carbon Wales

- cut emissions and transition to a low carbon economy in a way that maximises benefits for Wales
- consider delivery of low carbon related skills needed at regional level

Inequalities

- need to achieve full gender equality
- need to create a Wales where women can achieve and prosper by ensuring the potential female workforce is maximised in the region, especially in under represented sectors
- improve employment opportunities for disabled people and those with long term health conditions, in inclusive and supportive workplaces

Welsh Language

- achieve a **million Welsh speakers** by 2050
- “We need to bridge the gap between education and the work of work to increase the number of Welsh speakers” Aled Roberts, Welsh Language Commissioner, August 2019

Political Drivers – Brexit

Will affect the region in three ways:

- Economy – trade agreements, regulations
- Labour markets – changes to free movement
- Skills system – currently receives a large proportion of EU funding

Technological Drivers

- World now entering the fourth industrial revolution – industry 4.0
- Changing occupational and skills landscape
- New digital technologies e.g. Artificial Intelligence, the Internet of Things and new **SMART technologies**
- New metaskills e.g. building on self management, social intelligence and innovation
- So workforce can be agile and resilient to move through the transformation of work
- **46.4%** of jobs in Wales have a high potential for change through automation

Societal & Demographic Drivers

- Ageing population structure
- Balance between those of working age compared to those of retirement age falling over next decade
- In North Wales predicted increase in **over 65** year olds and decrease in working age population

REGIONAL DRIVERS: NORTH WALES GROWTH VISION AND GROWTH DEAL

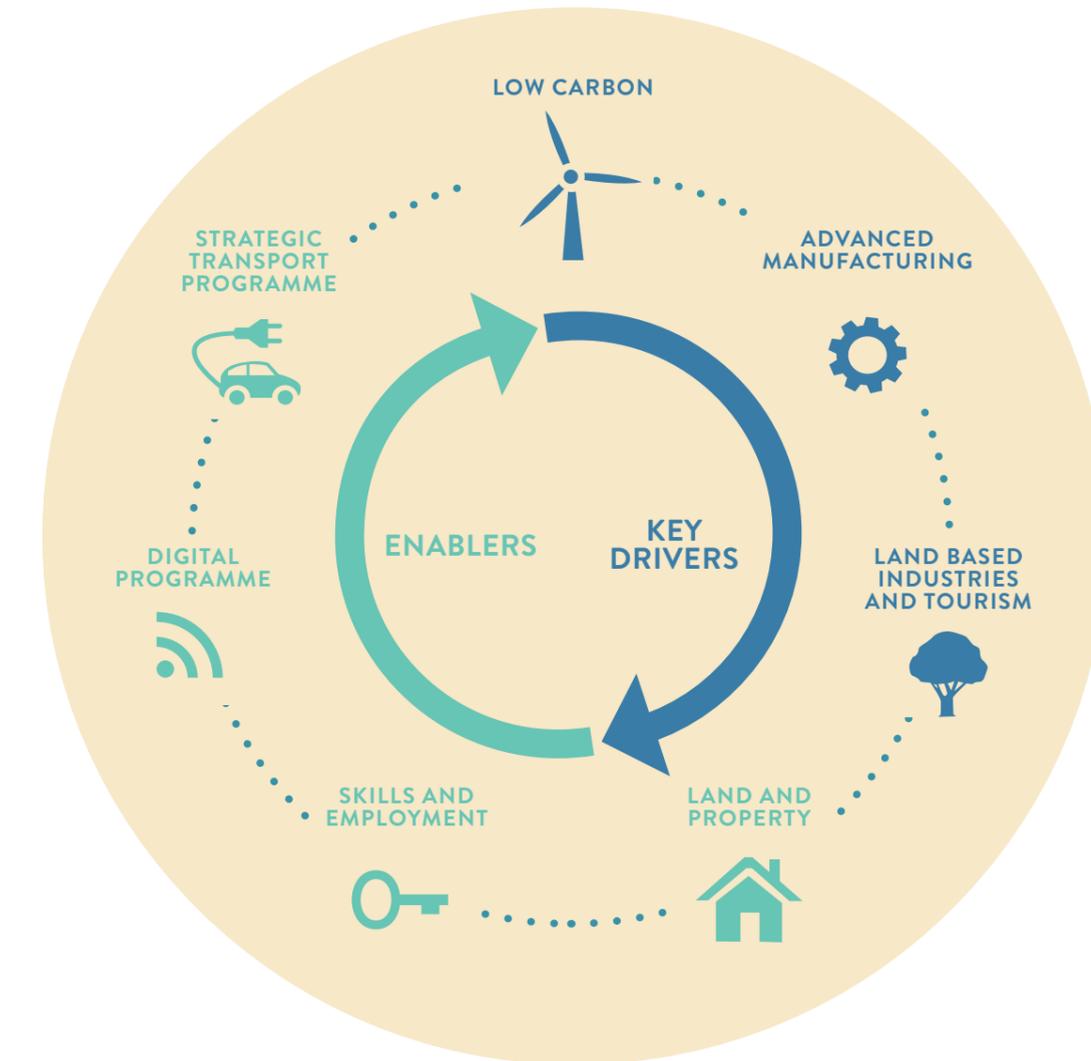
The Growth deal aims to support **6%** GVA uplift in our economy by creating **4,298** high value jobs and **£1billion** total investment.

North Wales Growth Vision

- Promote the region as one of the leading locations for **low carbon energy** generation and energy related supply chain investment
- Become the hub of **innovation and technology excellence** and a leader in developing digital business clusters, with the aim of putting the region at the forefront of artificial intelligence and data revolution
- Develop the reputation of North Wales as a centre of excellence for high-value tourism
- Create a sustainable skills base as an enabler for other Growth Vision projects to succeed

Other potential large scale job generating investments:

- **Regional Housing and Regeneration Projects**
- **21st Century Schools Education and Capital Projects**
- **Enterprise Zone developments including the flagship Advanced Manufacturing & Research Centre (AMRC) in Broughton and Llanbedr Aerospace Centre.**
- **Growth Track 360 – rail improvements**



NORTH WALES OVERVIEW: OUR LABOUR MARKET



Economy Performance and Productivity

- **74.9%** Employment rate (% of people in Employment) which is above the Wales average
- solid and positive growth in productivity and employment over recent years
- GVA per head in North Wales grew by **4.4%** in 2017
- Growth is not evenly distributed and inclusive across the region and variances between North West and North East Wales.
- Diverse economy underpinned by Manufacturing, Energy, Tourism and Public Sector

Business Base, Enterprise and Innovation

- North Wales is reliant on micro and small businesses
- **98.5%** enterprises in North Wales employing under **50** employees.
- Barrier to grow these beyond **50** employees
- Innovation and enterprise skills are crucial to increasing productivity of economy

Key & Growth Sectors

- **Energy & Environment**
- **Construction**
- **Advanced Manufacturing**
- **Creative & Digital**
- **Financial and Professional**
- **Tourism & Hospitality**
- **Health & Social Care**
- **Food & Farming**

Employment, Unemployment and Economic Inactivity

- significant dependence on public sector jobs
- large proportion of employment is in the Foundation Economy
- Predicted **2%** growth in management and professional occupations
- Predicted **1%** growth in sales and customer service jobs and range of elementary occupations
- Process, plan and machine operatives are projected to see least growth
- Replacement demand is a significant issue
- North Wales had the highest employment rate in year ending June 2018
- The growth in employment rate is not evenly distributed across the region
- Reliance on jobs in traditionally low paid sectors rather than high value sectors
- North Wales has an unemployment rate of **4%** lower than Wales (4.5%)
- North Wales economic inactivity rate is **21.3%**, below Wales and UK average, but it is not consistent across the region and has remained static for many years, so presents a challenge

Average Earnings

- Are not consistent across the region with full time weekly earnings lower in North West Wales in comparison to Wales average.
- Average weekly earnings in North Wales are down by **2.4%** (2018)

Deprivation & Rurality

North Wales has a number of areas that are within the top **10%** most deprived areas in Wales. Many of the most deprived areas are based in our rural communities

Cross Border Economy

- Potential to promote our facilities and centres of excellence with cross border opportunities with the Cheshire Science Corridor and Thornton Science Park and with wider geography with proximity to Liverpool, Manchester and Northern Powerhouse
- People will travel up to **90 minutes** access well paid employment
- Some challenges around differences in provision and funding regulations restricting options for study for apprentices

Travel to Work area

- Estimated **80%** of working age population reside within the cross border area
- **28,600** people travel from North Wales to England
- **32,400** people travel from England to North Wales

Population and Demography

- Population is expected to increase by **1.2%** between 2018 and 2023 – adding **8,126** people to education and skills pipeline
- Number of Adults aged 65 and over projected to grow by **16.6%** by 2028
- Demography of young people 14-18 years old has remained flat for the past 9 years but from 2020 onwards we will see an increase which will be a key consideration for post -16 planning curriculum.

Welsh Speakers

- **204,406 Welsh Speakers** in the region (2011)
- North Wales has highest proportion of Welsh speaker in Wales, at an estimated **42.7%**

Working Age Population with No Qualifications/High Qualifications

- **7.0%** of people in the region have no qualifications, better than the Wales average (8.4%)
- Seen a steady decrease over time
- **36.3%** of working age population in the region have a level 4+ qualification, lower than Wales average (37.8%)
- Not distributed evenly across the region

Skills Challenges

- **56.71%** businesses who took part in our survey indicated that they are facing recruitment challenges;
- Over a quarter of vacancies in North Wales (**30%**) are proving hard to fill due to applicants lacking the necessary skills, qualifications and experience
- **61%** of businesses currently facing skills gap
- Fit for purpose qualifications
- Work-ready and Employability skills
- Current workforce not agile or resilient to deal with shocks to the economy
- Graduate retention, especially in rural areas
- Replacement demand and succession planning issues as workers approach retirement age
- Brexit implications on some of our key & growth sectors



OUR NORTH WALES SKILLS LANDSCAPE



Our North Wales Skills Landscape: Our current provision

347 Primary Schools
54 Secondary Schools

2 Further Education Colleges

- involved in shaping and developing this Plan
- general agreement on some of the challenges and issues including, perceptions of sectors, the importance of STEM and digital skills and providing young people and their parents with the right information on learning routes and progression routes so they can make informed decisions

Grŵp Llandrillo Menai: continues to expand facilities including world class Canolfan STEM in Llangefni

Coleg Cambria: continues to expand facilities including Engineering Technology Centre, Bersham Road

Apprenticeships and Work Based Learning

- Steady **increase over last 3 years**, majority on levels 2, with some on 3 and 4+ apprenticeships
- But with variances according to sector in line with the needs and growth of the economy
- And stark gender differences on apprenticeship programmes e.g. females entering Engineering and Construction very low compared to Health and Social Care and Business
- **46.9%** increase in apprenticeship programmes started in North Wales between 2014-18
- Private training providers are strong asset for apprenticeships and work based training in North Wales

3 Higher Education Institutions

Bangor University
Glyndwr University
Open University in Wales

- Regional, National and International Role in skills demands
- Key to helping sustain growth of high performing sectors
- Research collaborations and industrial partnerships
- Bangor University and Glyndwr University are anchor institutions
- Bangor University has growing specialism in Nuclear and Low Carbon energy research and development
- Glyndwr University has specialism in harnessing OpTIC technologies

Careers Advice and Guidance

- Careers Wales play a crucial role in providing impartial careers information and guidance to young people and adults and supporting parents
- Job and career perceptions are formed at a young age
- Importance of Careers and Work Related Experience (CWRE) to be embedded in new curriculum
- In 2017 there was an increase in year 10 pupils indicating they would like to have an apprenticeship after year 11
- Indications show young people are choosing careers in the growth and priority sectors, but not across the board

Science, Technology, Engineering and Maths (STEM) Skills

- Need to develop our STEM workforce by ensuring a sufficient flow of secondary schools students who are interested in, and have a grounding in science and maths
- Employers struggle to recruit workforce and apprentices with STEM skills.
- Clear mismatch which needs to be addressed

OUR PRIORITIES AND SECTORS

To underpin our Vision, and set within our Regional context, we have identified **3 Priorities** that are required to support sector growth over the next 3 years.

The following explores what our 3 priorities mean in more detail by Sector. Further information (info graphics) on each sector can be found on pages 35 to 44.

PRIORITY

1

Building our future workforce and attracting talent

PRIORITY

2

Skills development for an inclusive North Wales

PRIORITY

3

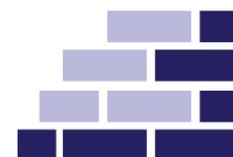
Promote career perception, pathways and apprenticeship opportunities



ENERGY & ENVIRONMENT

- Increase STEM learners **1**
- Upskill workforce with new technology **1**
- Improve apprenticeship opportunities **3**

Key Growth Sector: Predicted growth 1.5% from 2019-2022



CONSTRUCTION

- Upskill workforce with digital skills and SMART technologies **1**
- Promote apprenticeship opportunities for young entrants **3**
- Update perception of sector and encourage more female entrants **3**

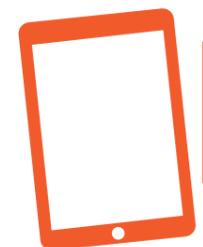
Sector of Importance: Predicted growth 0.5% from 2019-2023. Predicted growth private housing 1.3%, public non housing 1.4%, housing and repair work 1.8%



ADVANCED MANUFACTURING

- Focus on succession planning **1**
- Encourage apprenticeships, especially higher level & degree level –clear progression routes **3**

Key Growth Sector: Predicted growth 1.5% from 2019 – 2022



CREATIVE & DIGITAL

- Industry has appetite to help shape course content and consider shared apprenticeship opportunities **1**
- Ensure skills provision reflects diverse demand and rapid changes in technology **1**
- Careers information and guidance around understanding transferable skills and holistic navigation of career choices **2 3**

Key Growth Sector: Predicted growth 6% in digital sector from 2019-2023



TOURISM AND HOSPITALITY

- Recruitment is a crucial issue and could be exacerbated by Brexit **1**
- Update perception of sector and career opportunities and raise aspirations **3**
- Promote the value of apprenticeship opportunities **3**

Key Contributor to North Wales Economy: Demand is growing. Nature of demand is changing from service deliverer to experience stager

HEALTH AND SOCIAL CARE

- Recruitment and retention is a crucial issue **1**
- Upskill workforce for statutory requirements **2**
- Update perception of sector **3**
- Retain and upskill leadership and management roles **2 3**
- Increase and update digital skills **1**

Strategically Important Sector: Predicted growth of 4% per year required in social until 2032

FOOD AND FARMING

- Upskill for digitalisation potential and digital skills to: **1**
 - Mainstream digital connectivity
 - Deliver efficiency savings
 - Enable smarter decisions
 - Enable potential new growth and diversification

Growth is a key aspiration: Predicted growth 1% from 2019 – 2023

FINANCIAL AND PROFESSIONAL

- Increase supply of higher level skills to meet demand **1 2**
- Increase opportunities to upskill, train and retrain via short courses at levels 4+ with professional examinations and status **2 3**

Substantial contribution to Region: Predicted growth 1% from 2019 – 2022



Partneriaeth Sgiliau Rhanbarthol Gogledd Cymru
North Wales Regional Skills Partnership



PRIORITY 1 Building a future skills pipeline to future proof our skills system

BUILDING OUR FUTURE WORKFORCE AND ATTRACTING TALENT

ENERGY AND ENVIRONMENT



CONSTRUCTION



ADVANCED MANUFACTURING



CREATIVE AND DIGITAL



TOURISM AND HOSPITALITY



HEALTH AND SOCIAL CARE



FOOD AND FARMING



FINANCIAL AND PROFESSIONAL



FOUNDATION ECONOMY



EMPLOYERS/INDUSTRY VIEWS & DATA – HEADLINE CHALLENGES

<p>There is a shortage of STEM skills</p> <p>ALL SECTORS</p>	<p>In particular, STEM skills are needed to respond to advancements made in engineering, digital and advanced manufacturing sectors</p>	<p>There is a need to increase and update skills in digital and smart technology</p> <p>ALL SECTORS</p>	<p>A changing skill set in IT and digital is needed which includes programming, network development, 3D modelling, CAD, software engineering, cyber security and coding, especially in small and micro businesses</p>
<p>A changing skill set for technical skills is needed for new technologies, especially in low carbon</p>	<p>Digital leadership is needed within the construction sector</p>	<p>There is a shortage in high quality craft and technical skills at level 3, good quality project managers and health and safety operatives, specialist engineers, conservation roles, electricians, gas fitters and mechanical engineers</p>	<p>Need to align skills system with energy priorities</p>
<p>There is a shortage of training to upskill in the areas including site management, communication skills and groundworks</p>	<p>There is a shortage of specific skills in areas including architects, civil engineers surveyors, construction project manager roles, electrical trades, bricklayers, painters and decorators and fencing</p>	<p>There is a shortage of specific skills in areas including project managers, quality control specialists, process engineers, lean management, logistics management, engineering drawings, vehicle and trailer manufacturing and machinery manufacturing, process/plant/machine operatives and welders/solderers</p>	
<p>Skills and qualification provision needs to reflect current and future employer demand with rapid changes in technology and keep up to date with how quickly industry 4.0 is utilising the skills</p>	<p>There is a shortage of skills in areas including high level technical and digital skills, IT, art department, costume department, post production department, sound technicians and sales and customer services</p>	<p>There is a need for people with a multi-disciplinary mix of science and arts</p>	

<p>Creative and digital sector are interested in helping to shape course content and consider shared apprenticeship opportunities</p> 	<p>The current supply of higher level skills cannot meet demand so there is a need to upskill and reskill workforce for the Financial and Professional sector</p> 	<p>There is a shortage of skills in areas including sales and customer services, payroll management, accounting and finance, audit and risk</p> 	<p>There is a shortage of skills in areas including caring, leisure and service roles, sales and customer service, chefs, front of house, reception, SPA, beauty, media, sales, food and beverage assistants, business management, general labourers, bar staff, tourist guides</p> 
<p>There is a shortage of skills in areas including domiciliary care services, residential care services, residential homes for children, care workers, care assistants, nurses and care home management roles</p> 	<p>There is a shortage of skills in areas including quality assurance and technical managers, automation engineers, engineering, technical, health and safety, HR and skilled horticulturists</p> 	<p>Enterprise and Innovation skills are missing.</p> <p>ALL SECTORS</p>	<p>Analytical skills and creative thinking skills are in demand from employers</p> <p>ALL SECTORS</p>
<p>Enterprise, entrepreneurial and marketing skills are required.</p> 	<p>Innovation and business development skills are required in the tourism and hospitality sector</p> 	<p>Complex problem solving, critical thinking, creativity and emotional intelligence skills are often missing</p> <p>ALL SECTORS</p>	<p>It is often difficult to recruit staff with the desired linguistic skills in relation to Welsh Language, especially when combined with other specialist skills required</p> 
<p>Developing staff is a challenge within the construction sector with many finding it difficult to find training providers to deliver the training needed</p> 	<p>The impact of skills shortages poses a higher risk to the continued operation and hinders confidence to grow and expand for small and micro businesses in the region</p> 	<p>There is significant change taking place with the regulation and professionalisation of the social care workforce driven by the Regulation and Inspection of Social Care (Wales) Act 2016</p> 	

<p>38% of employers report staff in roles which don't take full advantage of their skills set, the highest in Wales</p> <p>ALL SECTORS</p> 	<p>Succession planning is needed to address replacement demand issues, especially in Advanced Manufacturing</p> <p>ALL SECTORS</p>	<p>71% of employers in the region are having difficulty recruiting for specific roles as related to skills shortages.</p> <p>ALL SECTORS</p>	<p>Skill shortage vacancies are the highest density in Wales – vacancies with no or insufficient applicants with required skills set.</p> <p>ALL SECTORS</p>
<p>Recruitment and retention is a critical issue and most difficult in Tourism and Hospitality and Health and Social Care sectors</p> 	<p>There is a continued staffing and skills shortage and a projected 500 new jobs needed to be filled each year for next 10 years, coupled with high replacement demand</p> 	<p>Brexit is a concern for some sectors more than others. There is a need to bring more people into the Tourism and Hospitality sectors</p> 	<p>Employers need an agile and resilient workforce who are responsive to change in opportunities, tasks and demands</p> <p>ALL SECTORS</p>

“The lack of skills and work experience, along with reducing workforce numbers and Brexit creates the perfect storm. This prevents growth and ambition” RSP Survey Respondent (June 2019)

THINGS TO FOCUS ON

- Ensure training provision and facilities meet current and future needs of businesses individuals and wider economy
- Reduce skills shortages facing businesses in growth sectors by growing and attracting talent
- Develop innovation skills for business growth



Building our future workforce and **attracting talent...**

WHAT DO WE NEED TO DO?

Skills pipeline:

Align RSP activities to deliver on skills pipeline issues for our major capital investment in the area, including the North Wales Growth Deal

Skills and Employment programme projects:

Deliver on the Skills and Employment Programme projects that form part of the wider Growth Vision for North Wales.

Digital Skills:

Develop digital skills and a digital-savvy workforce who are able to harness and exploit opportunities in the economy by building on the work of the North Wales Digital Skills project.

STEM:

To extend and better equip the future North Wales workforce in STEM by establishing, and maintaining, a North Wales STEM Framework that will enhance and extend learners experience of STEM and promote STEM-based careers in North Wales. This should be a collaborative process, with both private and public sectors working together with the support of local and national government. Linked to this, there is an appetite to develop a series of world-Class STEM hubs across the region.

Welsh Language Skills:

Proactively support and seek out opportunities to promote Welsh language skills across our growth sectors.

Brexit Skills Opportunities and Implications:

Develop and deliver skills interventions to address problems and grasp opportunities arising from Brexit by producing a risk assessment of Brexit implications on our sectors.

Replacement Demand Skills Opportunities:

Address the high volume of opportunities generated by replacement demand in sectors such as Construction, Energy & Environment, Advanced Manufacturing, and Health & Social Care.

Employer Engagement Strategy:

Strengthen our employer engagement strategy and work and establish more robust data flow and sharing between partners and Welsh Government. Opportunity to consider the best method of consulting with our sectors on their skills needs.

Labour Market Information (LMI):

Improve the quality and accessibility of regional LMI.

Talent and Retention Offer:

Develop a talent and retention offer with our HE and wider partners to ensure talent attraction and retention of our graduates to encourage innovation and enterprise growth in the region. Scope for exploring further a regional incubation graduate start up programme.



PRIORITY
2

Employability skills and progression into the workplace are key for an inclusive North Wales.

SKILLS DEVELOPMENT FOR AN INCLUSIVE NORTH WALES

ENERGY AND ENVIRONMENT



CONSTRUCTION



ADVANCED MANUFACTURING



CREATIVE AND DIGITAL



TOURISM AND HOSPITALITY



HEALTH AND SOCIAL CARE



FOOD AND FARMING



FINANCIAL AND PROFESSIONAL



FOUNDATION ECONOMY



EMPLOYERS/INDUSTRY VIEWS & DATA - HEADLINE CHALLENGES

<p>Current supply of high-level skills can not meet demand</p> 	<p>Work ready skills and employability skills are missing, often recruits are not 'work ready'</p> <p>ALL SECTORS</p>	<p><i>Work ready & employability skills = communication skills; basic literacy; numerical skills; problem solving; soft skills - attitude, motivation, resilience; and work experience</i></p> <p>ALL SECTORS</p>	<p>Employers want more focus on development of transferable employability skills</p> <p>ALL SECTORS</p>
<p>Over half of employers value broader skills such as problem solving</p>	<p>There is a need to upskill staff around legislation in Health and Social Care Sector and to upskill managers</p> 	<p>Qualifications do not always fit industry need</p> <p>ALL SECTORS</p>	<p>Some staff are operating below the required competency in their job role</p> <p>ALL SECTORS</p>

There is a need to support people who are not work ready and/or have many barriers in their way, to progress towards work

“Having good communication skills and having the correct attitude is key for us. We find that new recruits often lack these skills. Developing these skills through work experience and other activities could help”

RSP Survey Respondent (June 2019)

THINGS TO FOCUS ON

- How we shape programmes to help unemployed people and economically inactive adults to move into work, sustain and progress into employment;
- Forecast labour market opportunities and shape support for people to access pipeline of new job opportunities, particularly in growth sectors;
- Improve progression of low-paid workers up the career ladder.



Skills development for an inclusive North Wales...

WHAT DO WE NEED TO DO?

Employability Pathway:

Establish clear remit for our North Wales Advisory Group & Employability Group to ensure the implementation of an employability pathway in the region, which focusses on aligning opportunities and pipeline, particularly in our growth sectors.

Employability Skills Needs:

Gain an understanding of the basic employability skills needs of employers and how these can be met.

Reskill and Upskill:

Promote lifelong learning, and support adult learners to reskill and upskill throughout their lives including part time and distance learning options. Work Experience & Industry Placement: Boost programmes which include work experience and industry placements to help develop employability skills and transition into work

Personal Learning Account:

Work with Welsh Government, employers and Grŵp Llandrillo Menai to develop the pilot for the 'Personal Learning Account', which aims to support employed adults earning under the Welsh median income to gain higher-level skills, switch career or progress to a higher level.

Skills and Employability Programmes:

Promote skills and employability programmes such as placements and paid internships

Partnership working with RSP and GwE Educational Consortia:

Explore more ways to embed regional employer's messages within the current pre-16 education provision.

Graduate Employability:

Prioritise the development of graduate employability skills to support skill development and transition of graduates into work including but not limited to: Work-related learning opportunities, Student start up creation and retention, and Graduate Employability initiatives (such as internships, placements and graduate schemes).



PRIORITY
3

The perception of sectors, lack of understanding about different learner routes and apprenticeship opportunities.

PROMOTE CAREER PERCEPTION, PATHWAYS AND APPRENTICESHIP OPPORTUNITIES

ENERGY AND ENVIRONMENT



CONSTRUCTION



ADVANCED MANUFACTURING



CREATIVE AND DIGITAL



TOURISM AND HOSPITALITY



HEALTH AND SOCIAL CARE



FOOD AND FARMING



FINANCIAL AND PROFESSIONAL



FOUNDATION ECONOMY



EMPLOYERS/INDUSTRY VIEWS & DATA ON CHALLENGES

Difficulty recruiting to roles due to poor sector perception	Difficulty recruiting to courses due to poor sector perception	There is an out dated perception of some sectors, which inhibits recruitment and retention, especially in Health and Social Care, Hospitality and Tourism and Construction	Need clear progression routes for higher level and degree apprenticeships, especially in Advanced Manufacturing
Need to attract more females into the construction workforce	Lack of career progression is seen as a major challenge	There is a need to raise awareness of the breadth of career opportunities within tourism and raise the aspirations around tourism as a career choice	Unclear learner progression routes
			ALL SECTORS
Apprenticeships for young people needed, to assist with replacement demand, especially in the Construction and Energy Sectors	There is a need to promote the value of apprenticeship opportunities , especially in the Hospitality and Tourism sector	There is a need to help young people understand what are transferable skills and how to navigate career choices in a holistic way	The perceptions and knowledge needed to inspire young people about the Advanced Manufacturing Sector are robotics and automation, augmented and virtual reality, additive manufacturing, data analytics, artificial intelligence, cyber security and the internet of things
		ALL SECTORS	

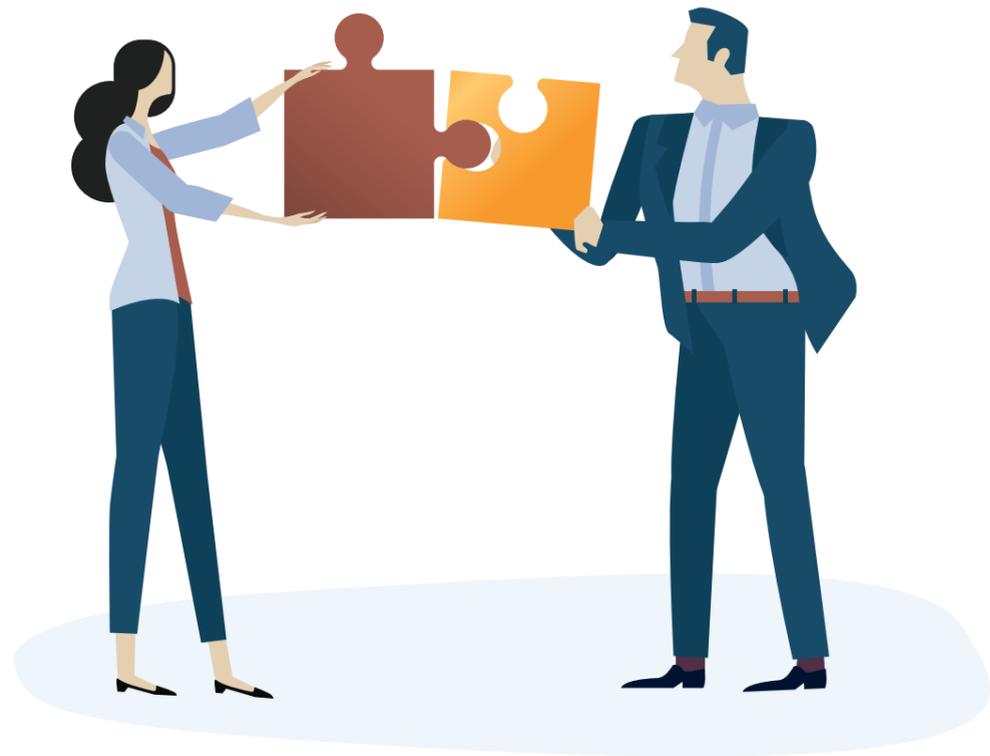
THINGS TO FOCUS ON

- How we change the perception of our growth sectors;
- Support more individuals to follow apprenticeship progression routes through provision of high quality information and guidance;
- Promotion of apprenticeship opportunities, including progression to higher-level and degree apprenticeships;
- Improve employers awareness and access to apprenticeships.



Promote career perception, pathways and apprenticeship opportunities...

WHAT DO WE NEED TO DO?



Apprenticeship Strategy:

Develop an Apprenticeship Strategy for the region that aims to raise awareness of apprenticeship opportunities and will include clear pathways and progression to higher-level and degree apprenticeships, especially in STEM and Digital subjects.

Learner Awareness of Apprenticeships:

Work with Careers Wales and our partners to ensure that learners are aware of apprenticeship opportunities in our region.

Perception of Sectors:

Work with partners to develop resources to promote careers in our key and growth sectors and challenge perceptions.

Provision:

Work with and support our providers to market 'hard to fill' courses in our key and growth sectors.

SECTORS IN FIGURES...



INFOGRAPHICS

Energy & Environment

Welsh Government define the sector as:

- Energy generation & use
- Renewable energy
- Emerging low carbon energy & technologies
- Environmental goods & services

WORKPLACES

No. of individual workplaces in sector in 2017

1,225 in Flintshire
Highest in North Wales

25% increase in Wrexham
Largest growth over the past 3 years

EMPLOYMENT

16,789 People employed in specialist energy & environmental companies in North Wales in 2016

63.3% Increase of people employed in sector in Denbighshire from 2014 - 2017

Employment in 2017



Apprenticeship programmes within North Wales in 2016/17

1,055 in construction **840** in engineering

FURTHER EDUCATION

Further Education

Learning activities in North Wales 2016/17

4,830 science & mathematics
6,390 engineering & manufacturing

Areas of study for Energy & Environmental

- Agriculture
- Construction
- Geography
- STEM

Higher Education

First, full time degrees in 2017/18

Bangor University

495 Physical Sciences

185 Engineering

Glyndŵr University

90 Physical Sciences

235 Engineering

There is a need for skilled employees with new investment in low carbon economy areas, including energy generation.

Future priorities:

- Offshore wind, solar and sustainable marine renewables – Morlais and Minesto are currently at the forefront of development of tidal energy technology in Anglesey. "Deep green technology has a global potential."
- Clean Transport and the roll out of electric vehicles. SP Energy Project Charge is an 38.5m trailblazer trial in the region as pilot
- Exploring potential of alternative fuels such as hydrogen
- Rural low carbon heating

DID YOU KNOW?

Wales' first nuclear research centre opened at Bangor University in 2017. The Nuclear Futures Institute has established two research centres at Bangor University, making North Wales a global centre in nuclear technology.

Working Futures

13,000 PEOPLE will be required to replace those leaving or retiring from the sector in North Wales up to 2024 within the sector.

Construction

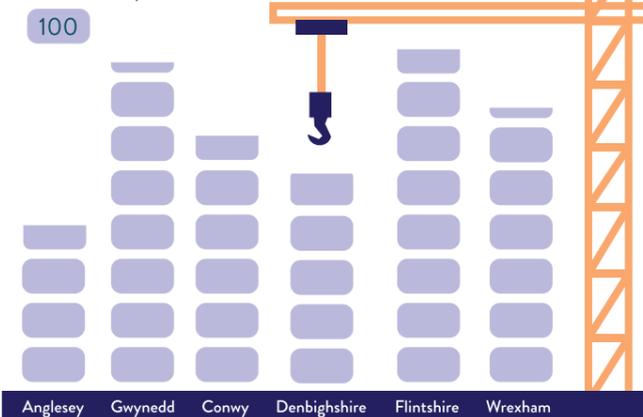
WORKPLACES

11,930 Enterprises in North Wales in 2017
97.7% were micro-businesses



Business Sites

Per County in 2017



EMPLOYMENT

25,200 People employed in Construction in North Wales in 2017

Primarily Male within the age range of 40-55 years old **23%** of the Workforce

Examples of Employers

- Wynne Construction (Bodelwyddan) (Wrexham)
- Read Construction (Wrexham)
- Brenig Construction (Mochdre)
- K&C Group (Kinmel Bay)
- B&W Builders & Decorators Ltd (Mochdre)
- Brenig Homes (Mochdre)
- Huws Gray (Head Office in Llangefni)

Employment 2014-2024



EMPLOYER SKILLS SURVEY

Employer Challenges

Recruitment **71.4%**
Developing Staff **57.1%**

78% of employers facing challenges in these areas:

Professional Occupations

- Architects
- Civil Engineers
- Surveyors

Skilled Trades

- Joiners, wood trades
- Plasterers
- Fencing

Efforts needed to attract more women

FURTHER EDUCATION

Apprenticeships

In the Construction Sector 2017/18

560 Level 2
490 Level 3 and higher

Areas of study in the highest demand

- Architects
- Civil Engineers
- Surveyors

4,790 Learning Opportunities in North Wales 2017/18

Brexit

The main issue facing employers is the cost of exporting and importing. The second highest issue is procurement of services. Interestingly, only a small proportion reported loss of skills and staff as their issues/challenges with Brexit.

The key challenge to the future of the sector is the need to upskill the current workforce, and new entrants with digital skills. The introduction of new technologies and materials means that employees will need to be adaptable and possess high level IT skills including 3D modelling.

Employers have problems recruiting architects, civil engineers and surveyors. In 2017/18, there were no full time first degree students enrolled in architecture, building and planning, and only 75 students enrolled at Glyndŵr University.

Advanced Manufacturing

Definition

Advanced Materials and Manufacturing are industries that increasingly integrate new innovative technologies in both products and processes with the relevant technology being described as "advanced," "innovative," or "cutting edge".

Subsectors of significance in North Wales are:

- Aerospace
- Automotive
- Chemical and pharmaceutical
- Engineering and precision engineering
- Opto-electronics
- Food and drink
- Metal and steel

WORKPLACES

1,425 manufacturing businesses in North Wales

27.4% of manufacturing businesses in Wales



EMPLOYMENT

36,000 people work in the sector in North Wales

203 postings for production workers in North Wales in 2018-2019

136 postings for welder/solderer

6,000 Approx. employees at Airbus

Most employ up to 50 people and a third of these are micro businesses

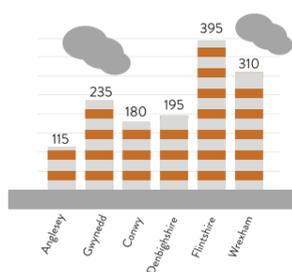
Efforts needed to attract more women

Working Futures

580 Professionals & Associate Professionals required per annum, up to 2022

8,000 Replacement demand up to 2024
38% of the workforce are aged 50+

Businesses in North Wales in 2018



Employer Skills Survey

The professional skills shortage include project managers, quality control specialists, process engineers, lean management, logistics management, and engineering drawings

FURTHER EDUCATION

450 Students are studying engineering and technology degrees in North Wales

Increased demand by employers for higher level qualifications at Level 4+, HNDs and postgraduate

970 Studied in FE in 2017/18

A new £20 million Advanced Manufacturing Research Institute is being built in Broughton - AMRC Cymru, and will open its doors in Autumn 2019

"AMRC Cymru is a game-changer. It will ensure a thriving industry base that will be a catalyst for economic growth across the supply chain, increasing productivity and supporting competitiveness of Welsh industry at home and around the world."

-Ken Skates, Minister for Economy and North Wales

Advanced technologies and Industry 4.0 demand new skills such as robotics, AI, VR, AR, cyber security

Will bring import/export challenges if a 'trade deal' is not agreed as well as the threat of increased costs generally and possible new trade tariffs.

310 new apprentices started a manufacturing engineering apprentice programme in 2017-18

100 new apprentices started programmes in food manufacturing in 2017-18

DID YOU KNOW?

BREXIT

Creative & Digital

WORKPLACES

Businesses in North Wales 2017

Digital Skills: specialism in computer programming and information services

Creative skills: specialism in publishing, film, TV, radio, advertising and design

- Creative and Digital jobs are found in all other sectors, e.g. marketing in manufacturing, programming in education, advertising in retail etc.
- There is an increase in demand for digital skills across the board (design, test, buy, sell, manufacture, train, recruit and support staff and products)

Businesses in North Wales 2017

Flintshire 25.3%

Gwynedd 20.9%

Strongest Growth Between 2014 and 2017

Flintshire ↑ 23.5%

Anglesey ↑ 20%

Denbighshire ↑ 20%

160 companies in the TV, media and film subsector, with a strong cluster of Welsh broadcasting companies in Gwynedd.

EMPLOYMENT

8,500 Working in creative industries, North Wales 2017

57% are micro businesses

Employees by Industry North Wales 2017

7,000 Computer Programming

800 Telecommunications

700 Information Service

1,000 Publishing Industry
40% of the total workforce in publishing in Wales

£569.20 Gross weekly earnings for the creative industries were the third highest out of the priority sectors

BREXIT Brexit poses a threat of increased costs and possible lack of funding streams and opportunities.

- DID YOU KNOW?**
- Creative jobs will be more resistant to automation and artificial intelligence. 87% of creative workers are at a low or no risk of automation.
 - Jobs in arts, crafts and design occupations are generally associated with higher levels of wellbeing.
 - There is a strong case for creativity to fall into the STEM priority initiatives and change this to STEAM (A=Arts).
 - The Welsh Government invested £30 million in the development of film and television projects in Wales between 2014 and 2019.

Top Tips

-The multi-disciplinary mix of science and arts is precisely what creative and digital businesses are crying out for. The 'User Interface' and 'User Experience' of mobile devices and games needs creativity as well as scientific ability.

-Innovation is a major driving force in the industry, especially the need for 'diagonal thinking' that brings creativity and entrepreneurship together.

-Welsh Creative Media companies operate in a global marketplace and the industry sees this as a great opportunity

FURTHER EDUCATION

Learning Activities in North Wales in 2017/18

3,785 Arts, Media & Publishing

3,300 Information Technology

225 IT Users, IT Software, Web, Telecom Routes

Apprenticeships Programmes in North Wales 2018

34 Creative first degrees offered in Bangor & Glyndwr Universities in 2018
1040 students studying these courses

68% of the Creative workforce has a degree level qualification

WORKING FUTURES

+43.8% QCF Qualified Level 4-6 in Creative Industries North Wales 2014 to 2024

2,000 Employment Increase in North Wales by 2024

1,000 Replacement Demand

57% Report skills shortages in: Digital, IT, Art Department, Costume Department, Production Department, and Sound Technicians

50% of recent employer survey respondents state the Welsh language is needed at work

✈️ Tourism & Hospitality

🏢 WORKPLACES

Economic Impact 2016

Anglesey **£284.34m**
 Gwynedd **£1.01bn**
 Conwy **£839m**
 Denbighshire **£479m**
 Flintshire **£252m**
 Wrexham **£115.9m**

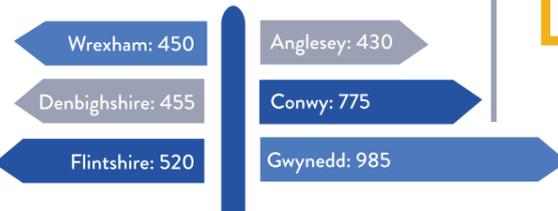
DID YOU KNOW?

A 2018 study by North Wales Tourism calculated that Zip World has directly contributed over £251million to the North Wales economy since 2013.

What is the best advice you could give to a young person wanting to get into your industry?

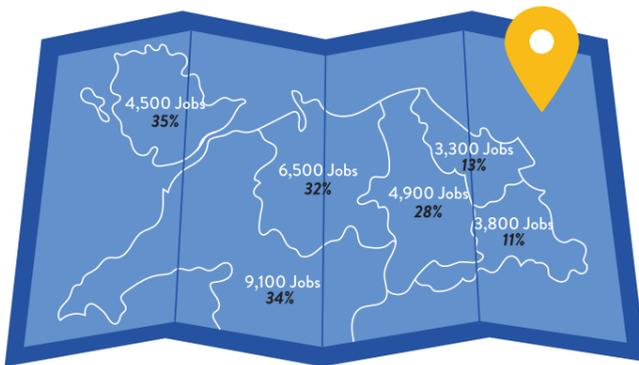
Anglesey Sea Zoo:
 Get as much relevant experience as you can, when you're as young as you can and make sure you do background work and know your stuff, so that you stand out from the competition in any job market.

Business Units in 2017



👤 EMPLOYMENT

Proportion working in tourism as a % of total priority sector workforce & Employment in 2017



Employer Skills Survey

48% of employers say their workforce needs and uses Welsh at work

60% of employers facing challenges. Mainly in these areas:

1. Recruitment
2. Seasonality
3. Making a profit
4. Perception of the sector
5. Poor transportation links

4 Occupations in Demand

- Caring, Leisure and Other Service Occupations
- Sales and Customer Service Occupations
- Skilled Trades Occupations
- Chefs

32% of employers said staff retention was an issue in leisure and tourism



📖 FURTHER EDUCATION

Learning activities in FE in North Wales 2017/18



Apprenticeships programmes in North Wales in 2017/18

450	Leisure, Sport, and Travel
725	Hospitality

🚌 WORKING FUTURES

5,000 job openings for elementary occupations in tourism from 2014 to 2024
2,000 job openings for managers, directors and senior officials in tourism from 2014 to 2024

Increase at QCF levels 4-6 in tourism from 2014 to 2024 in North Wales **105.5%**

Increase at levels 7-8 in tourism from 2014 to 2024 in North Wales **36.4%**

⊕ Health & Social Care

🚚 WORKPLACES

Definition

Health and social care is provided by the NHS via Betsi Cadwaladr University Health Board (BCUHB), Social work and social care provided by the six local authorities, and the health and social care services they commission to the independent sector.

Businesses in North Wales

1,245 are Micro Businesses (employ < 10)

- 84 GP Practices
- 374 Residential, day and care home providers
- 1,100 Child Care Settings

People Betsi Cadwaladr provides health services to **678,000**

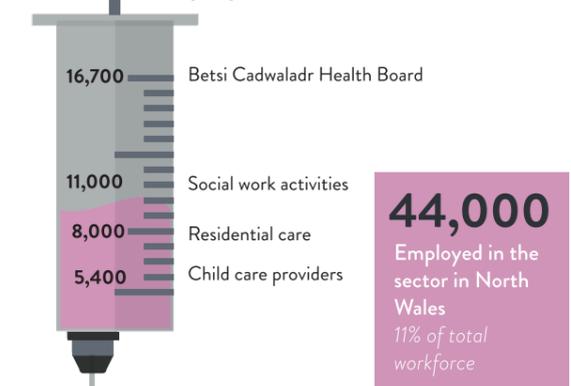
Spent by BCUHB in 2017/18 **£1.47b**

Top Tips

There are over 350 health roles in BCUHB alone, not counting the wider range of social care roles and settings. Young people need to change their perceptions of the sector and widen their understanding and knowledge of the sector.

👤 EMPLOYMENT

Employment in North Wales



🧪 WORKING FUTURES

Employer Skills Survey

66% of employers say that Welsh language is a crucial skill



📖 FURTHER EDUCATION

Apprenticeships Programmes

in North Wales in 2017/18



7,000+

Different learning activities in FE colleges and HE in the region linked to H&SC

Bangor University started a new course in 2018 affiliated to medicine

New postgraduate fast track to nursing and midwifery available in Bangor University

BREXIT

Brexit will pose significant challenges for the industry, in particular staff recruitment and retention in some roles.

DID YOU KNOW?

Innovation in technology will transform the sector in 10 years. Telemedicine and implants that could eliminate the effects of epilepsy and Alzheimer's; bio-printers that will be able to print new organs! In Japan, robotics are already assisting in elderly health care.

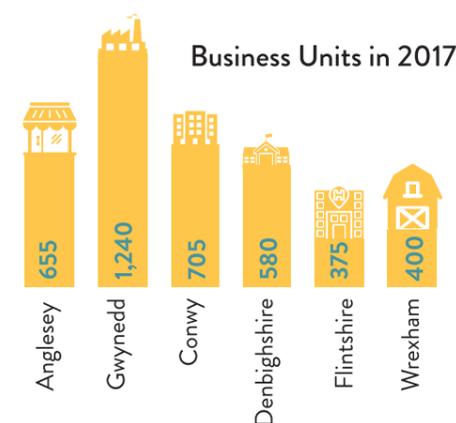
Food & Farming

WORKPLACES

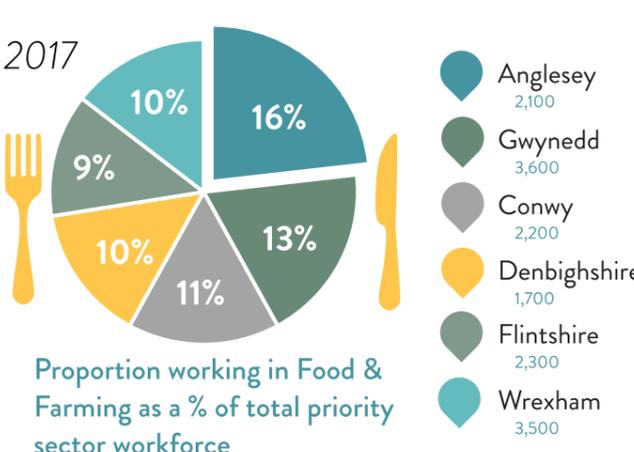
Food & Drink industry and its supply chain

- Primary production
- Food & drink manufacturing
- Catering & Hospitality
- Wholesale & Retail

What is the best advice you could give to a young person wanting to get into your industry?
Genus plc (based in Llanrydd, Ruthin):
 "Join a local young farmers group, providing the opportunity to form a network of contacts in the agricultural industry, and use this to gain experience and knowledge of many aspects of the industry".



EMPLOYMENT



WORKING FUTURES

46% of employers say their workforce needs and uses Welsh at work

- 4 Occupations in Demand**
- Skilled Trades
 - Professional
 - Process, Plant and Machine Operatives
 - Chefs

67% of employers are facing skills challenges

BREXIT Brexit will pose significant challenges for the food and farming industry, including increased costs, exporting/importing difficulties, and funding.

FURTHER EDUCATION

Apprenticeship programmes within North Wales in 2017/18



DID YOU KNOW? Diversification into food & manufacturing has become an increasingly important source of income for the farming industry.

Increase in those qualified at QCF Levels 4-6 from 2014 to 2024

+69.9% There will be +16.1% for levels 7-8

1,000 Job openings for process, plant & machine operatives in food & farming from 2014 to 2024

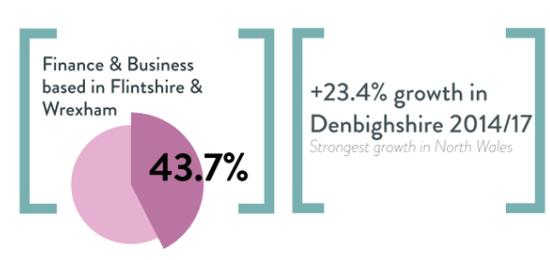
1,000 Job openings for elementary occupations in food & farming from 2014 to 2024

Financial & Professional

WORKPLACES

Definition
 The financial and professional services sector makes a substantial contribution to the region, both directly as a key source of employment allied to employment in the Foundation Economy, but also indirectly as a key source of employment and investment by providing specialist services to businesses across all sectors.

- Main Business Activity:**
- Accountancy
 - Insurance
 - Legal services
 - Corporate and 'head office' functions
 - Human resources
 - Professional services



11,385 Businesses in North Wales, 2017
 95% dominated by Micro Businesses (employ < 10)

- Moneysupermarket
- Moneypenny
- HSBC
- Development Bank of Wales
- HM Revenue and Customs

EMPLOYMENT



WORKING FUTURES

25,000 People will be working in sales and customer service occupations in North Wales by 2024

55% increase in demand for those qualified at QCF Levels 4-6 in the sector by 2024

BREXIT More than two thirds of finance and related professional jobs are based in London, however increased digital automation and digital services are leading to declines in financial services employment in some regions and uncertainty surrounding Brexit could amplify this trend.

FURTHER EDUCATION

Learning Activities
 In FE in North Wales

500 Accounting & Finance

80 of the 500 are in Economics

Business and Administration route has the largest number of students in both FE and HE

Bangor University is ranked 25th in the world for research in the field of banking.

Glyndwr University launched a FinTech Degree in 2017, the first of its kind in the UK.

140 Accounting apprenticeships programmes in North Wales in 2017/18

DID YOU KNOW?

- Moneypenny look for good speed and accurate typing skills, at least 35 words per minute. There are lots of free typing practice and tests online.
- Just over 1,000 people work for the Crown Prosecution Service and Ministry of Justice in North Wales.

Employer Skills Survey

- 44%** of employers are facing challenges in recruitment, staff development, reduced funding and competition.
- 30%** of businesses in financial and professional services had the issue of staff retention
- 25%** Said work readiness is an issue for – poor attitudes and low motivation being the top explanation.

Top Tips
 When reviewing a candidate's CV or application we look for customer service experience, administrative experience, team player, good grammar and spelling.

Moneypenny, Wrexham

Employers report a need to invest and upskill staff with higher levels of digital skills and telecommunications skills to keep up to date with new technology and grow their market and customers.



Foundation Economy



WORKPLACES

Definition

Business activities which provide the essential goods and services for everyday life.



Top tips for getting into customer services

Money Penny (based in Wrexham):
“The best tip I could give when job searching is making sure you have a great CV. It’s your first chance to make a great impression to any potential employers and it gives you a better chance of being considered. Especially if the employer receives a high volume of applications. You want to stand out! Making sure your CV is kept up to date and any gaps in employment are explained is also really important”.



EMPLOYMENT

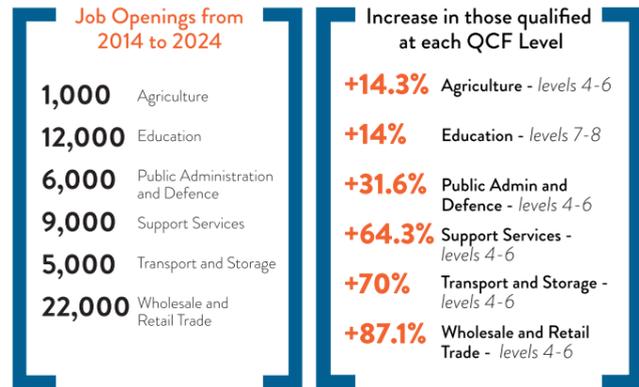
Employees by Industry

North Wales 2018



WORKING FUTURES

50,000 Employees will be needed in the Retail Industry in 2024



FURTHER & HIGHER EDUCATION

Learning Activities in FE
in North Wales in 2017/18



Apprenticeships Programmes in North Wales in 2017/18



BREXIT

Brexit will pose significant challenges for the retail industry, including increased costs, exporting/importing difficulties, and funding.

DID YOU KNOW?

The North Wales Growth Deal will see more than 4,000 direct and 10,000 indirect jobs created. There are 7 strategic programmes: low carbon energy, advanced manufacturing, land-based industries (agriculture and tourism), land and property, skills and employment, digital connectivity, and strategic transport.

GET IN TOUCH:

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FIND US ON TWITTER AT...



FOR MORE INFORMATION...

<https://northwaleseab.co.uk/jobs-and-skills/regional-skills-partnership>

