Regional Employment & Skills Plan

South West & Mid Wales

July 2017

Regional Learning and Skills Partnership
Partneriaeth Dysgu a Sgiliau Rhanbarthol
South West & Mid Wales
De-Orllewin a Canolbarth Cymru

Ariennir yn Rhannol gan
Lywodraeth Cymru
Part Funded by
Welsh Government

Regional Strategic Planning for Local Skills

The geography of the South West and Mid Wales Regional Learning & Skills Partnership covers six Local Authority areas. This plan will support the work of the Swansea Bay City Region, the Growing Mid Wales Partnership and the Enterprise Zones in the Haven Waterway and Port Talbot, by taking close consideration of the identified skills priorities for those areas and ensuring synergy where possible.

Contents

Regional Learning and Skills Partnership
Partneriaeth Dysgu a Sgiliau Rhanbarthol
South West & Mid Wales
De-Orllewin a Canolbarth Cymru

For more information contact the Regional Learning and Skills Partnership via info@rlpsww.org.uk

Foreword

The last two years have seen some monumental changes and the world continues to do so at an ever-increasing pace. That's a good thing because we need change in Wales. Our region lags behind the UK average in terms of GVA, qualifications and household income. Yet with change comes opportunity for those with the ambition and resolve to take advantage.

We are large enough to take on grand projects and small enough to be dynamic, provided we instil the ambition, self-confidence and value in ourselves. That's why I got involved in skills in this region and why I happily support the work of the Regional Learning & Skills Partnership and endorse this plan.

Skills give someone knowledge, confidence and value. The more people we train, especially the young, the more the region as a whole will benefit. Furthermore, there are a number of transformational projects underway in this region – Swansea Bay City Deal, the Tidal Lagoon, ARCH, IMPACT and a number of Growing Mid Wales projects such as VetHub1 and the Aberystwyth Innovation & Enterprise Campus that desperately require skills either lacking or not yet catered for here. These must provide a legacy, not just for now but for decades to come.

What impresses me most about the work undertaken by the RLSP this year is its commitment and delivery of employer engagement. It is now an employer-led organisation with every key sector represented on its board by an employer from that sector. Moreover, with almost 300 employers having provided input into this year's plan, it is the most employer driven plan we've delivered. For that we have to pay tribute to the partnership and support of providers at all levels.

What is coming through loud and clear from employers and providers is that we have an opportunity in the region and Wales to create the most work-ready people in the UK. It is that which will drive future success and prosperity of indigenous employers as well as attract the best from overseas.

So what do they need? What is "work-ready"?

Employers need people with a healthy work-ethic. They need better levels of basic skills such as literacy, numeracy and communication. There needs to be a stronger emphasis on STEM subjects in education. Across all sectors there is a demand for more technical roles, especially from engineering and IT. Employers need parents, teachers, young people and adult learners to see alternative routes to skills valued equally to academic qualifications so we capture all the talent that exists in the region.

This year's work by the RLSP represents significant progress, yet we're already planning on improvements for next year. There are more employers getting involved every month and significantly growing our list of contributors is a major priority. It is apparent that many employers still do not know the full scope of what is available and how to access the training and skills they desire. That access needs to be streamlined. Employers and providers need greater flexibility and support to tailor some training into bespoke packages alongside the continued development of traditional schemes into key subject areas.

Employers have welcomed involvement in this plan, but they want more. To do that effectively, the RLSP needs more and better data to inform the board and its cluster groups. This data should cover FE, HE and A-level provision across the region, as well as adult learning schemes. In this way, future iterations of the plan will not only be more objectively evidence-based, but will be much more pointed in their recommendations.

Finally, as much as this has been a collaborative process between employer and provider, and as much as this has been the most employer-led plan to date, it is incumbent upon the providers and government to heed the employers' voice. Ultimately the success of future engagement will depend on this.

We welcome all feedback and look forward to working with all parties in the region, and across Wales, to deliver a happy, prosperous and skilled workforce.

Paul Greenwood

Paul Greenwood

Chairman, Regional Learning and Skills Partnership


ABC
H2O

Executive Summary

This Employment and Skills Plan has been developed with the aim of informing and supporting the Welsh Government's strategic approach to the delivery of employment and skills provision.

Developed by the Regional Learning and Skills Partnership for South West & Mid Wales this plan places itself at the centre of Welsh Government's skills policy, working to support the delivery of a post-16 learning environment which is fit for purpose for the economic areas of the Swansea Bay City Region and Growing Mid Wales Partnership.

The RLSP has undertaken extensive employer engagement to inform the demand element of this plan. Over 280 businesses from across the region have engaged with the process through surveys, interviews, cluster group attendance or networking.

The aforementioned cluster groups have and will continue to play a pivotal role in the identification of industry priorities for the region, with plans put in place to address these priorities through effective partnership working with the RLSP and other key stakeholders as the implementation of the plan ensues.

Industry Priorities Identified

Advanced Materials, Manufacturing & Energy

- Develop an action plan to improve basic skills including literacy and numeracy and the attitudes and ethics of new recruits required across the sector.
- Develop and implement a strategy to promote careers in engineering at all levels, with specific reference to apprenticeships at all levels – post GCSE, post A-level and post degree, using role models to illustrate the opportunities within the sector. Include a focus on females into engineering.
- Use the role models identified above to illustrate the transferability of skills in matching the labour supply and demand for major projects and how this will prevent duplication and reduce costs.

Construction

- Examples of good practice from around the region should be celebrated and further developed rather than 're-inventing the wheel'. The Cyfle Building Skills programme is one such example where the positive impacts for learners and businesses alike have been recognised through a Queen's award. Other organisations should be encouraged to engage and support the initiative to enhance a long term sustainable provision for the sector.
- Procurement procedures have a significant detrimental impact on small and medium sized businesses. In light of this there needs to be a review resulting in a consistency of approach to the procurement of products.
- Whilst it is recognised that the professional organisations such as quantity surveyors, architects and other consultants who are synonymous with the construction industry have been categorised within the Financial and Professional Services Sector it is felt that the construction professional organisations should be included within the Construction Sector as this will align with other training initiatives nationally such as the CITB Go Construct web site and the local approach of professional apprenticeships being piloted in September 2017. This also needs to be applied to the mechanical and electrical contractors so that a whole sector approach can be developed.

- The ever-increasing commercial nature of educational providers has taken the focus away from the provision itself with providers becoming more concerned with the quantity rather than the quality of learners. Alleviating this commercialisation would increase social conscience and place the focus back on the learner and develop true collaboration between the sector and training providers.
- The views in the recently published 'Modernise or Die: The Farmer Review of the UK Construction labour model' set out the need for the construction industry to change in line with differing construction demands. Similar goals should be set for the education and training sector in partnership with the construction employers with identified needs within areas such as, work experience, mentoring, civil engineering operatives, multi skilling, technical and professional apprenticeship progression which are currently being addressed outside of the main traditional core training routes.

Creative Industries

- Develop staff to transition into work to develop new skills.
- Ensure that the supply meets demand and that the training meets industry requirements e.g. ICT training is changing quickly but the delivery is not moving as fast.
- There needs to be a co-ordinated approach between Industry and Education on where Industry needs to go and how this is co-ordinated.

Food & Farming

- The creation of training that is fit for purpose with bespoke elements to meet the needs of employers and the industry as a whole. This includes on-going training which would support in staff retention, which is currently a significant issue.
- The perception of the sector needs to change amongst learners and parents. More engagement with schools is required to ensure that the sector is portrayed as one that is full of potential and opportunity. This would attract young entrants to the sector and help to alleviate the pressure of an ageing workforce.

Health & Social Care

- Availability of nurses across both the public and private sector is an immediate priority area, action required on training, recruitment and retention.
- Preparing the social care workforce for registration in advance of full registration by 2020 including a package of support is a priority.
- Improving the image of health and social care including the understanding of it as a worthwhile career, identification of progression routes including the promotion of apprenticeships and preparation of individuals for management through 'values based' recruitment.
- Welsh language is important for delivering care within the region, need identified for increasing the levels of conversational Welsh language skills.

Leisure, Tourism & Retail

- Develop a Hotel School of Excellence in Hospitality for the region. Coupled with this would be the agreement and promotion of an area wide standard of good visitor care for the Heritage Industry and attractions.
- Enhance the CPD opportunities for existing staff and raise the profile of the Industry within schools.
- The Further Education sector and industry should work in partnership to develop relevant training for the industry that meets the needs of the learner, industry and provider. Through this process consideration should be given to examples of good practice that are currently being delivered in the region.

Financial & Professional Services & ICT

- Future proofing with businesses doing effective workforce planning supported by long term plans in education to support their ability to recruit new employees with the right skills and knowledge and flexible learning to help them develop their existing people.
- Dialogue needed with the training providers to ensure the content of the courses are meeting the industry demands including an element of work based learning so people are more work ready.
- Leadership and commercial awareness training to supplement the professional qualifications.

Mid Wales Industry Cluster Group

- The immediate priority is to improve the offer locally in Mid Wales, however until this is achieved it is essential that cross border activity remains available to learners. Individuals are the most important not where they live or work and standards and funding should provide appropriate mechanisms for continued delivery until an appropriate alternative is offered.
- Need to innovate and do things differently, including being more agile and more responsive to innovation and change.
- A lack of quality and appropriate training locally is a concern, greater emphasis needs to be placed on employer and learner satisfaction and the needs of the local labour market.
- There is a difficulty in recruiting assessors in a number of areas which is impacting upon the availability of vocational delivery.

Recommendations

The recommendations set out in this plan have been agreed upon by industry representatives and RLSP board members. It is the intention of the RLSP to actively address these priorities through effective partnership working with the identified key stakeholders and industry representatives as detailed in section 6 of the plan.

Strategic Development

The industry cluster group structure provides valuable employer feedback and allows effective engagement between the RLSP and key employers.

1. **The RLSP will work with the established cluster groups, cluster group chairs and providers to develop activity around the priority areas identified by each individual sector.**

A number of large infrastructure projects and key developments aligned to the economic areas of SBCR and GMW have been outlined which will have significant skills implications for the region.

2. **To lead on the opportunities for skills in both the Swansea Bay City Deal region and Growing Mid Wales region.**

A number of large scale national infrastructure projects have been identified which will inevitably have skills implications for the region.

3. **The RLSP to work with large scale national infrastructure projects to understand the impact on the regional workforce, including any labour 'pull' effects.**

Employability

Employer feedback indicates that basic skills is a concern. In many instances a lack of these skills is more prevalent in new entrants and young school leavers.

4. Basic skills including literacy, numeracy, communication and digital skills remain a concern for many employers. The RLSP to seek to increase levels of employer satisfaction in regards to basic skills.

Employer feedback indicates that the employability of individuals at all levels is a concern.

5. The RLSP to work with partners across the education and skills spectrum to enhance the employability of individuals, including aligning activity to the all Wales employability programme.

Employer feedback has indicated that digital skills are a priority, with many facing difficulty in recruiting individuals with the desired skills in this area (this is especially prevalent in the Financial & Professional Services sector). There is a need therefore to enhance the prevalence of digital skills amongst both learners and the workforce, with particular focus on higher level IT and software skills to drive the development of the digital economy.

6. There is a need to enhance the digital skills across both learners and the workforce, with particular focus on higher level IT and software skills to drive the development of the digital economy.

Learning & Career Choices

Evidence gathered from employers & learners indicates that Apprenticeships are poorly understood as learning opportunities.

7. Increase the understanding of opportunities offered by apprenticeships across the region and develop targeted promotion with employers, learners at all levels, as well as parents and guardians to ensure that opportunities are understood.

The quality and quantity of the current offer of careers advice provided to learners was highlighted as an issue by employers. This is supported by the learner evidence. Employers feel that this is a contributory factor to the poor perception currently held by society of some sectors.

8. Improve the availability of careers advice to younger students to help inform subject choices and to raise awareness of potential learning and careers opportunities.

Many sectors suffer from poor perceptions of employment types, job roles and pay. Employers feel that this is to the detriment of attracting and retaining new talent to the sectors.

9. Raise perceptions of sectors where there are identified recruitment issues caused by poor perceptions of employment in the industry.

Opportunities and Provision

Employers highlighted within the cluster groups that they would like Apprenticeships to better reflect their needs.

10. Improve employer engagement in the development of Apprenticeship frameworks, including for higher and degree level programmes through greater direct employer input and flexibility.

Both providers and employers highlighted the difficulty of developing new provision in some geographic areas.

11. Additional assistance needs to be provided to facilitate new provision in geographic areas where currently the required resources are not available, this includes the required equipment and teaching resources to develop the desired activity.

Some employers expressed concern that learners and in turn local would be negatively impacted if individuals were not able to study some activity in England due to funding or differences in qualifications.

12. A 'learner first' approach needs to be adopted in relation to students who choose to study outside of Wales with a particular focus on those who live near the border, or where provision is not available more locally.

Providers and employers expressed concerns that the data (relating to the curriculum offer) provided for analysis was not appropriate to conduct a comprehensive analysis. Particular reference was made to the aggregated nature of the data and the lack of information provided for HE, school level provision, A-level provision and adult learning.

13. Data for analysis needs to be improved to improve business confidence and understanding of provision.

Evidence indicates that there are gender disparities with regard to employment in sectors aligned to STEM. Furthermore, the same evidence shows that levels of employment within those sectors generally is decreasing.

14. Increase promotion of STEM related subjects and careers to learners across all age group.

Section 1

Introduction

1.1 Purpose

This Employment and Skills Plan for South West and Mid Wales has been developed between January and July 2017 with the aim of informing and supporting the Welsh Government's (WG's) strategic approach to the delivery of employment and skills provision.

As one of three Regional Skills Partnerships (RSPs) in Wales, we are at the centre of WG's skills policy, working to support WG in the delivery of a post-16 learning environment which remains fit for purpose and sets Wales ahead of other UK nations and internationally.

To coincide with the Regional Learning and Skills Partnership's (RLSP's) geography this plan supports the work of the economic areas of the Swansea Bay City Region (SBCR) and the Growing Mid Wales (GMW) partnership, carefully detailing and considering the respective priorities for those areas. As identified in the previous plan both areas are unique in their labour and economic profiles which are significantly affected by their differing geographies, where possible this has been considered within this plan.

In alignment with 2016's iteration, we will once again aim to influence the key curriculum areas of Apprenticeships, vocational qualifications, and the further education landscape. However, additional focus will be placed on such factors as;

- Taking consideration of the well-being indicators published to assess the impact of the WGs work in relation to the Wellbeing of Future Generations Act.
- Ensuring regional Labour Market Information (LMI)[1] as detailed in the plan will inform the delivery of employability provision in the region as part of the All Age Employability Programme.
- Further emphasis on the role of the Welsh Language in the economy, detailing the demand for Welsh language skills from industry.
- To identify the skills requirements of the Green economy in accordance with supporting Green Growth and innovation.

1.2 Process

Adopting a phased approach to the development of the plan has allowed the RLSP to maximise engagement and consultation with a range of stakeholders whose views have been considered essential to the development of this plan.

1.2.1 Phase one - Determining Demand

Phase one sees the development of a number of industry cluster groups with which the RLSP has extensively engaged. These cluster groups consist of key employers from across the region representing a range of different business demographies and whose main business activity aligns with differing sub-sectors of their respective industries. These cluster groups represent the following sectors (which have been deemed of significant priority to the region of South West and Mid Wales);

- Advanced Materials and Manufacturing and Energy,
- Construction,
- Creative Industries,
- Financial and Professional Services and ICT,
- Food and Farming,
- Health and Social Care,
- Leisure, Tourism and Retail.

[1] Labour market information includes all quantitative or qualitative data and analysis related to employment and the workforce.

The creation of these groups has allowed for the collection of a range of primary data of both a quantitative and qualitative nature through both focus group sessions and surveys[2]. This data has been invaluable and will serve as the primary source of demand evidence for the region.

Complementing this consultation was the commissioning of a piece of work into determining the skills needs of small and medium enterprises based in the region. This work captured the detailed views of companies[3] of differing sizes from across the region. This information has been analysed in conjunction with the primary data gathered by the RLSP and will form the employer insight element of this plan.

A further integral stage of this phase was to contextualise this 'real-time', representative employer insight through the analysis of a range of secondary labour market intelligence (LMI)[4] acquired via WG. This analysis allows deduction of the region's performance in terms of the economy and education coupled with information on population and business demographies.

The level of employer engagement conducted by the RLSP confirms that this plan has considered not only secondary LMI but also the 'real-time' needs of the key employers within the region.

1.2.2 Supply Analysis

Phase two sees the analysis of the curriculum supply information[5] provided by WG to the RLSP for consideration against the demand intelligence gathered in phase one. A key element of this phase was the development of a provider cluster group which includes representation from the 5 FE colleges and 4 universities delivering in the region and National Training Federation Wales (NTfW), Cambrian Training, Careers Wales, Department for Work and Pensions (DWP) and Education through Regional Working (ERW). This engagement was integral in underpinning the work undertaken by the RLSP in the analysis of the appropriateness of curriculum provision and how recommendations were made at a sectoral level.

A full list of annexes can be accessed here
http://www.rlp.org.uk/employment-and-skills-plan-2017-annexes/

1.3 Limitations & Factors for Consideration

When reading this document a number of factors should be considered, these are;

- As per the specification from WG this plan only serves to make recommendations on full time vocational provision and elements of work based learning. This supporting data can be seen in annex 1 within the supply summary. The RLSP appreciates that this is a small portion of the post-16 offer available within the region as it does not consider school level provision, A-level provision, the current higher education offer or adult and community learning. It is the hope of the RLSP to produce a regional plan which fully comprehends the entirety of the post-16 landscape, fully addressing these limitations in future iterations with the support of WG.

- The educational provision data provided to the RLSP by WG is aggregated to a regional level and it is therefore impossible to identify the offer of individual institutions. The RLSP appreciates that this presents challenges when attempting to make recommendations on changes to delivery as sub-regional differences are not accounted for. The RLSP hope to address these issues in future iterations of the plan through agreement with WG and the individual providers themselves.

[2] A list of employers engaged with can be seen in annex 2
[3] A list of employers engaged with can be seen in annex 2
[4] This data can be seen in annex 3
[5] This data can be seen in the Supply Summary in annex 1

- This plan is one of three produced in Wales in order to support WG in their desire to adopt a regional approach to skills investment. Whilst the methodologies implemented vary between the three, the over-all aim of the documents remain consistent. The three RSPs adopt a transparent approach to producing these plans and work in synergy whenever possible. The differing economic priorities of each respective region result in a variation of approach and recommendations as they are developed and addressed at a regional level as per the requirements of WG.

- The employer evidence included in the sector profiles should be regarded as the views of solely the employers that the RLSP engaged with during this process (either through cluster group meetings, survey responses or interviews) and not the industries as a whole. Whilst the italicised comments found within these profiles were made by individual employers or industry representatives they have been agreed as being fair and accurate representations of the views of the remaining employers within those industry groups.

- Providing a balanced and representative portrayal of the skills landscape in the region has been of the utmost importance to the RLSP. In light of this the provider perspective is provided in section 5 detailing the limitations and challenges faced by the providers operating within the region.

Section 2

Policy Context

2.1 Pestle Analysis

2.1.1 Regional Pestle Analysis for South West & Mid Wales

Political

Government policies
Legislation
Election cycles
Bureaucracy
Devolution
Planning
Brexit

Economic

Under-performance in value & productivity
Lower pay levels
Global economic instability
Increasing demands for employment
High propensity of lower value occupations
Low rates of research & development activity
Globalisation
Changing employment patterns
New business models
Automation of knowledge work
Lack of affordable quality housing
Economic mobility
Brexit – Importing & Exporting of goods
Brexit – Access to funding

Social

Qualification levels
Ageing workforce
Workless households
NEETs
Work-life balance
Demand for flexible working
Quality of life
Changing work environments
Economic migration
Digital & social networks
Social mobility
Health and wellbeing
High and increasing dependency ratio
Ever increasing cost of further & higher education

Technology

Automation of knowledge work
Internet of things
Advanced robotics
Advanced materials
Advanced energy
Renewable energy
Mobile internet and cloud technology
Digitalisation
Nanotechnology
Remote healthcare
BigData

Legal

Regulatory requirements
Intellectual property law
Brexit – Changes to procurement & grant funding rules

Environmental

Rurality
Access to services & opportunities
Transportation links
Suitability of land for development
Low carbon technologies
Climate change
Resource scarcity

[6] An individual is regarded as being NEET if they are not in employment, education or training

2.2 SWOT Analysis

2.2.1 SWOT Analysis for SBCR

Strengths

- Good quality of life and good life expectancy
- An improving broadband network
- Heritage and Culture
- Natural Resources
- Strong entrepreneurial culture
- Diverse mix of rural and urban geographies
- Home to 2 high quality HE institutions
- Existing regional collaboration
- Presence of long established RICS & RACS
- Cross-sectoral learning providers
- Technical resources

Weaknesses

- Lower qualified workforce
- Ageing workforce
- Low wages
- Low GVA
- Below average productivity levels & disposable household income
- Lower proportion of those in employed in higher occupational groups
- Pockets of rurality lacking access to services
- Access to market
- Poor transportation links & infrastructure
- Poor network connection in rural areas
- Underemployment

Opportunities

- Innovation
- Renewable energy sources e.g. tidal
- Natural environment & landscape
- Enterprise zone and local growth zone developments
- Knowledge economy roles
- Haven Waterway Enterprise zone
- Port Talbot Enterprise Zone
- Swansea Bay Tidal Lagoon
- The Swansea Bay City Deal
- Regeneration of city centres and town centres
- Yr Egin
- New campus developments
- G-Fast test-bed
- ARCH
- Apprenticeship levy
- Increasing the participation of females in traditionally male dominated sectors
- Widening skills of older workers through reverse mentoring

Threats

- The effects of Brexit
- Apprenticeship levy
- Global economic uncertainty
- Lack of affordable housing
- Withdrawal of centralisation of services
- Changing political landscape
- Cuts to funding
- Reduction in public sector employment
- National living wage
- Competing in a global market
- Brain drain – loss of talented individuals
- Lack of investment in infrastructure

2.2.2 SWOT Analysis for GMW

Strengths

Good quality of life and good life expectancy
Quality of the environment
Strong social capital
High educational attainment
High employment levels
Available land
Technical resources
Heritage and Culture
Natural Resources
Strong entrepreneurial culture
Proximity to industrial regions
Home to two high quality HE institutions

Weaknesses

Lower qualified workforce
Ageing workforce
Below average productivity levels
Poor ICT & transport infrastructure (especially mobile phone coverage)
Population changes & migration
Reliance on micro businesses within the economy
Brain drain – loss of talented individuals
Low population density
Higher cost of living & service provision
Underemployment
Lower proportion of those in employed in higher occupational groups
Access to market
Poor connectivity in some areas

Opportunities

Innovation
Renewable energy sources
Natural environment & landscape
Enterprise zone and local growth zone developments
A higher zone status for the Severn Valley
Developing East-West economic links through the Marches LEP
Growing the knowledge based economy
Apprenticeship levy
Break the low skills/low productivity cycle
Sectors compatible with the rural economy & links to HEI
Increasing the participation of females in traditionally male dominated sectors
Widening skills of older workers through reverse mentoring
An improving broadband network

Threats

The effects of Brexit
Apprenticeship levy
Global economic uncertainty
Lack of affordable housing
Economic stagnation – Low GVA
Disconnect between education system & employers
Withdrawal of centralisation of services
Changing political landscape
Cuts to funding
Reduction in public sector employment
National living wage
Competing in a global market
Brain drain – loss of talented individuals
Lack of investment in infrastructure

2.3 Economic Performance

2.3.1 Gross Value Added (GVA)

The South West and Mid Wales regions continue to lag behind the UK and Wales averages, indexed values indicate that the South West Wales figure has remained relatively constant at 67.1 since 2009. The positive is that the Mid Wales region has displayed an increase in indexed values from 61.6 in 2009 to 66.9 in 2015.[7]

The economic performance of the region relative to the UK has remained static across the South West and Mid Wales region. This is of importance as it highlights that existing interventions and support for the region has not resulted in sustained economic growth relative to the rest of the UK economy.

[7]http://rlp.infobasecymru.net/IAS/themes/economy/labourmarketintelligence/economicperformance/tabular?viewId=1959&geoId=34&subsetId=127

2.4 Demographics

Mid-year population estimates indicate that approximately 207,284 people are living in Mid Wales, with 691,961 living in the four counties of South West Wales. Both economic areas have an ageing population with the proportion of the population aged 65+ having increased by 5% and 2.8% in Mid and South West Wales respectively between 2002 and 2015. In addition, the proportion of the population aged between 0 and 15 has decreased in both economic regions over the same time period.[8]

The Ageing Workforce

The data above highlights the demographic challenges being faced, however, there remain significant economic opportunities through greater utilisation of older workers. Research undertaken by Price Waterhouse Coopers (PWC) through its 'golden age index' shows that the UK is ranked 18th of the Organisation for Economic Cooperation and Development (OECD) countries for its opportunities for and performance of its older workers. It also highlighted that if the employment rates for workers aged over 55 were to increase to those of Sweden then UK GDP could be around 5.8% higher, which is equivalent to around £105 billion at 2014 values.[9] Improving the utilisation of older workers is a critical element to solving the region's productivity challenge.

Evidence within the report highlights that there are a number of ways in which integration of older workers can be enhanced, including phased retirement approaches as well as expanding training programmes to include older workers such as reverse mentoring.

Barriers to improving the participation and productivity of older workers may include workplace limitations such as equipment or accessibility, inflexible workplace practices or potential benefit barriers. A common perception relating to the employment of older workers is that it can cause the displacement of younger workers with companies and restrict the development and progression opportunities.

Engaging the Younger Workforce

Engaging young people both new to and within the workforce is an important challenge in developing the future labour market within the region and to ensure that individuals are being utilised to their full potential. Evidence from the PWC young workers index highlights that the UK scored below the OECD average between 2006 and 2015 and that the UK has the highest youth unemployment relative to unemployment rates of older workers out of all 35 OECD countries, which can in part be attributed to a high overall employment rate.

There is evidence to suggest that young people are having difficulty entering the labour market which highlights that *'the UK has relatively high rates of part-time work for 15-24 year olds. While this may be preferable for some workers, it is likely to adversely affect earnings, training opportunities, career development, and job security.'*[10]

[8] http://rlp.infobasecymru.net/IAS/themes/economy/labourmarketintelligence/people%e2%80%93demographics, employment,unemploymentandeconomicinactivity/tabular?viewId=1977&geoId=1&subsetId=42
[9] PWC Golden Age Index – Jun 2016
[10] PWC Young Workers Index – Oct 2016

2.5 The Welsh Language

WG's vision is to see the Welsh language thriving in Wales, a long-term strategy which will span between 2017 and 2050 will detail the ambition of reaching a million Welsh speakers by 2050.[11]

A study into the Welsh language needs of businesses in eight key sectors conducted by WG found that around 40% of employers surveyed in South West Wales and 38% of employers in Mid Wales found having Welsh language skills to be important compared to 35% across Wales.

The primary evidence gathered by the RLSP supports this but further substantiates its importance in different sectors. For instance, the vast majority of respondents surveyed within the Health and Social Care, Leisure, Tourism and Retail and the Creative Industries sectors reported the Welsh Language as being very important within their businesses. Further information can be found within the sector profiles.

2.6 Qualification Levels of the Population

The most recent statistics indicate that 12.5% of the population of South West Wales had no qualifications, this is above the Welsh average at 10.2%. Conversely, only 6.9% of the population of Mid Wales had no qualifications, comparing positively with the Welsh average. This trend is also pertinent when analysing those qualified to level 4 or above with the Welsh average at 35.8%. South West Wales' average sits below this at 33.5% and Mid Wales' sits above at 38.1%.[12]

2.7 Employment & Unemployment

The most recent statistics indicate that there were 388,700 people in employment in the region in the year to September 2016, with both regions showing increases over the year. Of the 6 counties, only Pembrokeshire saw a decrease in employment over the year.

Employment rates were higher in Mid Wales, 73.6%, than in South West Wales, 70.7%. However, both were lower than the UK rate of 73.7%. Within the two economic regions, Powys had the highest employment rate of 77.8% and Ceredigion had the lowest with only 66.9% of their population being in employment.

At 5.3%, unemployment rates were higher in South West Wales than in both Wales and the UK. Conversely, the unemployment rate in Mid Wales was 3.1%, which was lower than the rates for both the UK and Wales. This was driven by South West Wales containing the county with the third highest rate of unemployment; Swansea.[13]

2.8 Travel to Work Areas Analysis

The commuting of individuals within the region to places of work is an important consideration when identifying the different impacts of traveling to work across the region.[14]

[11] http://gov.wales/topics/welshlanguage/policy/living/?lang=en

[12] http://rlp.infobasecymru.net/IAS/themes/economy/labourmarketintelligence/qualifications,educationandtraining/tabular?viewId=1984&geoId=1&subsetId=42

[13] http://rlp.infobasecymru.net/IAS/themes/economy/labourmarketintelligence/people%e2%80%93demographics,employment,unemploymentandeconomicinactivity/tabular?viewId=1975&geoId=1&subsetId=42

[14] The ONS undertakes a wide analysis of the travel to work trends across both geographic areas as well across socio-economic classifications. These travel to work areas are defined as 'at least 75% of the area's resident workforce work in the area and at least 75% of the people who work in the area also live in the area.' It is important to note that travel to work boundaries do not match existing administrative boundaries highlighting the complexities involved in understanding the impact on individual areas

Mode of work is one of the most significant factors which impacts on travel to work areas, with evidence indicating that full time workers have fewer travel to work areas suggesting that individuals in full time employment are more likely to travel greater distances to work than those who work part-time. A further factor relates to the qualification levels of individuals, with those who have low qualification levels having a significantly higher number of travel to work areas with much smaller geographies.[15] This suggests that those with low qualifications are less able or willing to travel longer distances to work and therefore tend to source employment within their immediate locality.

Time and distance travelled are also significantly affected by rurality and the suitability of transportation infrastructure. This effect would be considerably lesser if rural areas were able to capitalise on improving their connectivity and creating an environment which is supportive of home working.[16]

2.9 Business Demography

The region as a whole is dominated by micro and small businesses, the most recent statistics, indicate that 99% of the businesses operating in the region have less than 99 employees. Neath Port Talbot and Swansea have the highest percentage of medium and large sized enterprises with Powys and Ceredigion having the lowest.[17]

The Changing Pattern of Employment

The way that people work continues to evolve and traditional notions of a job for life is increasingly unrealistic for many within the labour market. Increasingly the labour market is becoming more fluid with dynamic and different ways of working and various ways to be employed, these changes produce a number of skills challenges. Research undertaken by the Recruitment & Employment Confederation (REC) highlights that *'13% of British people believe they will be working in traditional '9 – 5' employment by 2025'*[18] *highlighting the awareness of the changing nature of employment and the need for flexibility. However the impact of zero hours contracts can affect different groups disproportionately 'People on 'zero hours contracts' are more likely to be young, part-time, women, or in full-time education when compared with other people in employment'.*[19]

The increasing use of zero hours contracts and the development of the 'gig economy' provide flexibility for both employers and individuals contractual arrangements but they also pose a genuine skills challenge. The Office for National Statistics (ONS) has identified that 905,000 workers within the UK have no guaranteed working hours[20], (often termed as zero hours contracts) with 22% being within the Accommodation and Food sector and 20.2% in the Health and Social Care sector. In addition *'around a third (32%) of people on "zero hours contracts" want more hours compared to 9% of people in employment not on zero hours con*tracts'.

The diversity of the arrangements of the 'gig economy' include a variety of models including self-employed franchises and personal service companies amongst others. This can shift the responsibility for some skills development from employers onto individuals and can prove a challenge in relation to time and money for individuals.

[15] *http://ons.maps.arcgis.com/apps/MapSeries/index.html?appid=397ccae5d5c7472e87cf0ca766386cc2*
[16] *http://ons.maps.arcgis.com/apps/MapSeries/index.html?appid=397ccae5d5c7472e87cf0ca766386cc2*
[17] *http://rlp.infobasecymru.net/IAS/themes/economy/businesses/tabular?viewId=595&geoId=1&subsetId=42*
[18] *Gig Economy: The ubernisation of work – REC 2016*
[19] *Contracts that do not guarantee a minimum number of hours: September 2016 - ONS*
[20] *Contracts that do not guarantee a minimum number of hours: March 2017 - ONS*

2.10 Digital Skills

Digital skills are becoming increasingly important within the economy with many job roles becoming increasingly digitalised.

'Digital skills underpin growth across the economy and are vital to ensuring global competitiveness and productivity. They are needed across the population to enable social inclusion and access to digital public and private services.'

If the UK and indeed Wales are to become world-leading digital nations then it is imperative that the current and future workforce are equipped with the right skills which allow them to full take advantage of the opportunities that new digital technologies will provide.

'Market and institutional challenges mean that many businesses are struggling to obtain employees with the right skills to exploit technological opportunities, and sections of society are missing out on the benefits of the digital economy.'

At a regional level the Swansea Bay City Deal will provide significant opportunities within the digital sector, it is therefore imperative that any market and institutional challenges are addressed in a timely manner. The Swansea City and Waterfront Digital District in particular will provide much opportunity for the development and expansion of high value digital/tech companies which will be positive both for employment levels and the economy as a whole.

2.11 Rurality

Rurality and the rural economy

The rural economy within South West and Mid Wales is of significant importance and encompasses large areas of the North and West of the region. It faces a wide range of challenges that are unique to the rural setting. These include the issues identified below;

a) Declining productivity

The productivity as measured by GVA within predominantly rural areas is significantly below the UK and also below those of more urban areas across the region. This is a trend that is visible across the UK. This is in part due to the nature of businesses located within the different areas with higher numbers of high GVA industries such as Financial and Professional Services being located in the more urban areas. An additional factor is the nature of employment within rural areas with a greater emphasis on part time working and self-employment, often relating to lifestyle businesses.

'Self-employment, part-time working and seasonal employment are more prevalent in rural labour areas. Self-employment and part-time working can be a positive lifestyle choice or a response to a lack of employment opportunities.'[21]

This productivity divide between the urban and rural areas is significant as it produces a number of skills related challenges in particular relating to the availability, recruitment and retention of appropriately skilled individuals.

[21] *Employability and Skills in Rural Scotland 2012 – Scottish Government Employability Learning Network*

b) Demographic challenges

Within the region there are a significant number of demographic challenges with rural areas being more likely to have issues regarding an ageing population. This includes a higher proportion of over 65s than the urban averages which affects both the demands on local services as well as the proportion of working age residents who can form the workforce. This demographic imbalance creates significant challenges both in creating a critical mass required for economically viable delivery of interventions but also a requirement for the re-skilling of older individuals.

c) Effects of migrant labour on the rural economy

The rural economy consists of a number of sectors where there is currently a fairly high reliance on the usage of migrant labour, particularly from the EU. These sectors include food production and processing, hospitality and tourism as well as the Health and Social Care sector.

d) Access to services

Rurality and in particular deep rurality places significant pressures on the delivery of services due to a number of different factors which include;

- Lower population densities make achieving relative economies of scale difficult, this can include a low number of clients for services to support, making costs expensive for delivery bodies as well as limiting the potential engagement opportunities.
- Large travel distances between conurbations increases time and cost for accessing services, this can hinder the skills development of individuals within rural areas who may encounter these barriers.
- Poor digital connectivity remains a challenge due to the cost of installing fibre broadband, issues with ‘the last mile of connectivity’ remain a significant challenge for many in rural areas.

2.12 Gender Equality and Imbalances

There is significant evidence to suggest that women and men do not enjoy the same rights and opportunities across all sectors of society. For Wales this is especially prevalent within the labour market and economy where there is not an equal representation of men and women across a range of roles, sectors and subject areas.

Women are underrepresented within a number of the WG’s priority sectors, as detailed in the table overleaf;

Sector	2006		2015		Difference for Females between 2006-2015
	Male	Female	Male	Female	
Advanced Materials & Manufacturing	87,300 (81%)	20,800 (19%)	69,100 (81%)	16,600 (19%)	-20.2%
Construction	115,000 (88%)	15,800 (12%)	102,000 (90%)	11,000 (10%)	-30.3%
Creative Industries	18,700 (59%)	13,200 (41%)	30,200 (61%)	19,400 (39%)	47.1%
Energy & Environment	122,900 (82%)	26,400 (18%)	121,200 (77%)	36,200 (23%)	37.1%
Food & Farming	31,600 (73%)	11,600 (27%)	34,200 (67%)	16,500 (33%)	42.0%
Financial & Professional Services	52,400 (52%)	47,600 (48%)	75,600 (56%)	60,500 (44%)	27.1%
ICT	23,500 (72%)	9,100 (28%)	18,200 (75%)	6,200 (25%)	-31.1%
Life Sciences	7,900 (60%)	5,200 (40%)	8,900 (67%)	4,400 (33%)	-15.1%
Tourism	49,400 (50%)	49,300 (50%)	69,700 (53%)	62,700 (47%)	27.2%

The table depicts that an area of particular concern is the stark lack of women employed within the Advanced Materials and Manufacturing, Construction, Energy and Environment and ICT sectors in comparison to men. With the exception of the Energy and Environment sector the level of female employment within these sectors has decreased significantly since 2006. A disparity within sectoral employment can result in gender pay gaps, a disproportion within skills development and a lack of access to the same opportunities and progression.

For instance, given the alignment of the aforementioned sectors to the Science, Technology, Engineering and Mathematics (STEM) sector this is particularly worrying, given the perceived benefits of pursuing a career in this area; *'the gap in starting salary between men and women who have studied STEM subjects and go on to take jobs in those spheres is smaller than in any other subjects studied. If more women were to pursue careers in these areas, not only would it give them a more balanced portfolio of skills, but it would also narrow the gender pay gap for those in the early years of their working lives.'*[22]

There is much research to suggest that solving the gender pay gap would need a focussed effort on increasing the profile of STEM subjects among young female learners.

[22] *https://www2.deloitte.com/content/dam/Deloitte/uk/Documents/Growth/deloitte-uk-women-in-stem-pay-gap-2016.pdf*

'Solving the gender pay gap over the long term means tackling an ingrained difference in the skills that women gain and choose to develop during their academic studies and, therefore, in the jobs they go on to take. If more women are encouraged to study STEM subjects during their education and are taught in a way that recognises their cognitive preferences, we not only prepare them for a more dynamic world of work but we simultaneously start to bridge the gap in pay. This will require clear focus by both policymakers and employers'.[23]

2.13 The Green Economy

The vision set out by WG in the economic strategy *'Economic Renewal: a new direction (2010)'* is centred on achieving economic prosperity through the *'strengths and skills of its people and natural environment'.* A key part of this strategy was the identification of nine priority sectors; ICT, Energy and Environment, Advanced Materials and Manufacturing, Creative Industries, Life Sciences, Financial and Professional Services, Construction, Tourism and Food and Farming. These sectors are deemed as those who can provide wider economic benefit through exploiting *'ICT, creating green jobs, resource efficiency and the movement to a low carbon economy'.*[24]

The economic profile of Wales has historically been shifting from a manufacturing dominated base resulting in *'trends and predicted changes in industrial structure having important implications for the design and successful implementation of green growth policies'.*[25] Hence, placing the green economy in a key position as Wales strives to foster innovation and create a prosperous economy that works for everyone.

Green growth can be defined as;
'Green growth in Wales is about fostering economic growth, development and social inclusion while ensuring that the natural assets provide the resources and environmental services on which our well-being relies. To do this it must stimulate investment and innovation which will underpin sustained growth and give rise to new economic opportunities, human capital formation and skills building, and redistribute the proceeds of growth.'[26]

The four green growth indicators for Wales as proposed by the OECD are as follows;

- **The environmental and resource productivity of the economy** which includes greenhouse gas intensity of economic activity, resource circulation and recover and energy performance and the sustainability of building stock.
- **The natural asset base** which includes the implementation of good environmental management in primary industries and the condition of ecosystems.
- **The environmental quality of life** which is inclusive of the self-perception of wellbeing, health hazards posed by air pollution and access to culture and services.
- **Economic opportunities and policy responses** which includes the skills levels of the workforce and workforce participation; a particular area of interest given the purpose of this plan.

The suggested measurable indicators under economic priorities and policy responses are detailed in the table overleaf;

[23] https://www2.deloitte.com/content/dam/Deloitte/uk/Documents/Growth/deloitte-uk-women-in-stem-pay-gap-2016.pdf
[24] http://www.cynnalcymru.com/wp-content/uploads/2015/02/Green-Growth-Baseline-Study1.pdf
[25] http://www.cynnalcymru.com/wp-content/uploads/2015/02/Green-Growth-Baseline-Study1.pdf
[26] http://www.cynnalcymru.com/wp-content/uploads/2015/02/Green-Growth-Baseline-Study1.pdf

Economic Opportunities & Policy Responses	**Skill Level of the Workforce**
	• Percentage of absenteeism by pupils of compulsory school age in primary & secondary schools • Percentage of population with no qualifications • Percentage of 16-64 year olds educated to NVQ level 4 and above
	Workforce Participation
	• Rate of unemployment, people aged 16 -64 • Rate of economic inactivity, people aged 16 – 64 • Economic activity rate, people aged 50 and over

The WG has outlined its strategic objectives in relation to green growth through its document 'the business of becoming a sustainable nation.'[27]

2.14 The Apprenticeship Levy

The levy is a UK-wide tax which applies to all UK employers with an annual 'wages bill' of £3 million or more.[27]

Understandably, concern has been expressed by employers in relation to how the levy will work and what it will mean for them. The WG remain committed to delivering its Apprenticeship Programme via the Welsh Apprenticeship provider network and has no plans to operate the voucher system currently being delivered in England.[28]

Research undertaken during the development of the Apprenticeship levy by the British Chambers of commerce outlined a number of concerns regarding the implementation of the levy and the likely impact. Of particular concern was the limited number of respondents who said that it would have a positive impact on their business. This included *'11% who say the reforms will increase their recruitment of apprentices, 5% say it will have a positive impact on their wider training budget and 11% say it will improve the quality of vocational training in the sector.'*[29]

2.15 The Political Landscape

The political and policy landscape across Wales and the UK is increasingly dynamic with significant areas of policy divergence across the UK and the devolved administrations of Wales. This includes the significant decision undertaken by the nation in June 2016 to vote to leave the European Union as well as a period of political uncertainty. Within the skills policy area there has been an increasing amount of divergence between the policies of the respective governments of the UK, in particular between the policy for skills in England and within Wales, creating significant challenges for companies with cross border businesses.

The WG has developed a number of policy responses to the skills challenges being faced in Wales. These have included two high profile reviews into the post compulsory education system (Hazelkorn review) and into student financing (Diamond Review) alongside the development of new policy interventions.

The WG's response to Professor Hazelkorn's review outlined the development of a single strategic body to provide oversight of the post- compulsory education sector. It is intended that this new body will be given responsibility over planning, funding, contracting, ensuring quality, financial monitoring, audit and performance, and be the lead funder of research.

[27] *The business of becoming a sustainable nation – Welsh Government - 2016*
[28] *https://businesswales.gov.wales/skillsgateway/apprenticeship-levy*
[29] *Businesses in the dark about the apprenticeship levy – British Chambers of Commerce – 2016*
http://www.britishchambers.org.uk/Workforce%20Survey%20Infographic%20-%20Apprenticeships.pdf

These proposals will present significant opportunities for the enhancement of relationships across the post compulsory education sector *'This is an opportunity to shape a system where institutions of all types are encouraged to work together to meet learners' needs, enabling progression and building strong links with business, so that skills gaps can be addressed.'*[30]

The recommendations of the aforementioned Diamond Review placed a strong emphasis on supporting students *'It is maintenance assistance that gives them the flexibility to manage their finances and, for some students, to overcome the financial challenges associated with a period of higher education study.'*[31]

The WG also published its updated Apprenticeship policy through the publication of *'Aligning the Apprenticeship model to the needs of the Welsh Economy'*[32]. This document outlines the renewed focus on Apprenticeships and the need for these to greater match the requirements of industry. *'We know that the jobs of tomorrow will require far higher levels of competence than in the past. To meet this challenge Apprenticeships will need to integrate more effectively into the wider education system and economic fabric of Wales.'*[33]

The policy document also puts a greater emphasis on the need to ensure that Apprenticeships are viewed as a valuable route into a career. *'Apprenticeship routes need to be a credible alternative to the academic route and young people need to be given the opportunity to experience the benefit that a vocational career pathway will bring.'*[34] This is important in supporting the wider aims of the WG including increasing employability and reducing poverty.

To support the area of employability the WG is developing the Employability Plan for Wales which is seeking to undertake a more holistic approach to employability. This includes the need *'to reshape employability support for job-ready individuals, and those furthest from the labour market, to acquire the skills and experience to gain and maintain sustainable employment.'*[35] This approach intends to reduce the duplication of provision within the area of employability and to improve the experience of individuals across the employability spectrum.

2.16 Wellbeing of Future Generations (Wales) Act 2015

The Wellbeing of Future Generations (Wales) Act is unique to Wales and requires public bodies to think about the long term impact of their decisions. The act puts in place seven wellbeing goals and public bodies are required to work towards all seven goals[1].

- A prosperous Wales,
- A resilient Wales,
- A healthier Wales,
- A more equal Wales,
- A Wales of cohesive communities,
- A Wales of vibrant culture and Welsh Language,
- A globally responsible Wales.

The goals are supported by five ways of working including long-term, integration, involvement, collaboration and prevention.

[30] http://bit.ly/2niEaYM
[31] http://gov.wales/docs/dcells/publications/160927-he-review-final-report-en.pdf
[32] http://gov.wales/docs/dcells/publications/170206-app-policy-plan-en-v2.pdf
[33] http://gov.wales/docs/dcells/publications/170206-app-policy-plan-en-v2.pdf
[34] http://gov.wales/docs/dcells/publications/170206-app-policy-plan-en-v2.pdf
[35] http://gov.wales/docs/strategies/160920-taking-wales-forward-en.pdf
[1] https://futuregenerations.wales/about-us/future-generations-act/

2.17 Brexit

The triggering of Article 50 on the 29th of March 2017 marked the beginning of the process of the UK leaving the European Union over a 2 year timescale. At present the potential impacts of Brexit remain unclear which provides a significant challenge in understanding the future demands of business and the potential impacts on the labour market as a result. Evidence from the Centre for Cities highlights the importance of exports to the EU from the region and Swansea was ranked as 7th highest in terms of total percentage of exports to the EU with 60% of exports being to the EU.[36] The McKinsey Global Institute has highlighted that improving productivity will be essential to the success of a post Brexit economy as currently '66% of UK employees work in companies with below-average productivity'.[37]

The potential impacts of Brexit within the region have been identified within the individual sector profiles through engagement with employers.

[36] http://www.centreforcities.org/wp-content/uploads/2017/01/Cities-Outlook-2017-Web.pdf
[37] http://www.mckinsey.com/global-themes/europe/productivity-the-route-to-brexit-success

Section 3

Sector Profiles

Context

The sector profiles which are contained within this section are the result of the primary research conducted by the RLSP over a period of six months ranging between January and June 2017.

The evidence displayed was gathered via a range of qualitative research methods, including electronic surveys, sector cluster groups and semi-structured interviews. Adopting a qualitative approach to the collection of this information allowed the RLSP to gather the in-depth views of a number of employers from around the region, many of whom remain highly engaged with the process.

The qualitative nature of the information presented should be considered in conjunction with existing secondary quantitative research such as the Employer Skills Survey for 2015. Where possible the primary information shown has been supported by sector specific secondary evidence.

The profiles are intended to provide a representative summary of the views of the industry representatives and employers with whom the RLSP engaged with throughout the development and completion of this plan.

3.1 Advanced Materials, Manufacturing and Energy

Defining the sector

Wales has a long standing tradition and rich heritage in heavy industry, engineering and manufacturing. A skilled workforce and high level of expertise coupled with innovation steered by collaboration between key employers, WG and academic institutions makes the sector a key economic driver for the region of South West and Mid Wales.

Most recent statistics indicate that over 21,700 people are employed within the sector in the region, with the highest incidences occurring in Neath Port Talbot and Carmarthenshire. The sector is broad and categorised by sub-sectors such as aerospace, automotive, electronics, medical, defence, food, rail, technology and materials.

3.1.1 Employer Evidence

Recruitment and Retention

Recruitment rather than retention is a key issue for the Advanced Materials and Manufacturing sector with employers feeling that the perception of the sector is a significant contributing factor. The sector is one that is particularly reliant on vocational forms of training which further exacerbates the difficulties in recruitment as the perception of Apprenticeships is poor and mis-informed. Additionally, many companies are awaiting approval of major infrastructure projects which poses challenges in recruiting individuals at all, given the lack of financial capacity to employ staff ‘at risk’.

Employers reported that the recruitment of experienced individuals especially within engineering, specialist and technical areas is a significant challenge. Furthermore, challenging market conditions and uncertainty are causing some retention issues as staff strive to find jobs that offer some stability and security.

Suitability of Skills Provision

There is a clear demand from employers for increased ‘on the job’ training which in the majority of instances doesn’t need to be accredited. There is a need to develop further flexibility within training offered. The requirement from HE/FE/EU funding for accredited projects is a barrier to some training activity and not representative of the needs of employers, in this instance outputs should be measured on the number of jobs secured or contracts won etc.

The Apprenticeship levy is a source of confusion for employers, especially those who have sites that are outside of Wales where there are fears that this could have negative impacts on training. The trailblazer model currently delivered in England is seen as a strong model which ensures the appropriateness of a given qualification for a business.

There is a strong demand for job specific non-accredited training across much of the sector and as a result there is a strong culture of internal training within companies. A number of companies in the sector regularly seek to 'grow their own' and develop individuals within the organisation through established progression routes. This is seen as important for retaining individuals and also ensuring that the companies have the right skills and attributes in their workforce.

Opportunities and Challenges

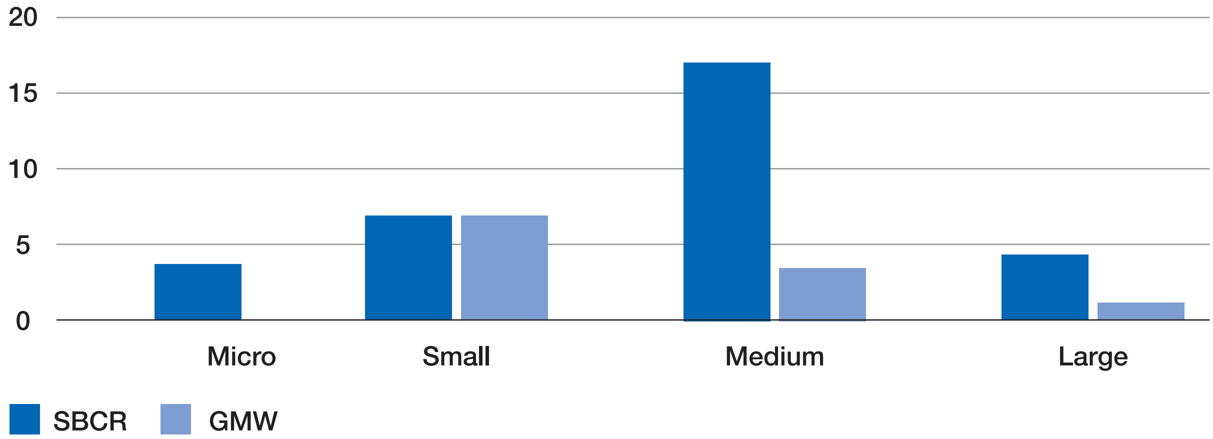
Technological advancements will pose both challenge and opportunity for the sector. There is a need for current and future workforces to be appropriately trained and equipped with the desired skills to see the benefit of these advancements. In line with this there is concern that current infrastructure is poor and connectivity and internet speeds need to be developed to support growth.

The recently published Workforce Renewal and Skills Strategy from Energy and utility Skills details three strategic priorities for the Energy sector, which are;

- To address sector attractiveness and recruitment in the hope of increasing the sectors future talent pool
- To maximise investment in skills specifically through investments made by asset owners and their supply chain
- To address anticipated skills gaps and shortages through targeted action.[38]

3.1.2 Primary Research Analysis

Response Profile for Advanced Materials & Manufacturing



[38] *http://www.euskills.co.uk/sites/default/files/Workforce%20Renewal%20and%20Skills%20Strategy%20FINAL.pdf*

Challenges and Drivers of Change and Demand

The majority of businesses that engaged with the process indicated that one of the most significant challenges they face is the recruitment of a suitably qualified workforce. This is especially prevalent for businesses based in rural locations.

'The most significant challenge we face is finding employees. Due to our location it is so difficult to find the right employees with the right skills for our industry. Unfortunately, our work load is forever increasing. We are having to turn down work as we don't have the workforce to complete the required works in time.'

Additionally, further challenges reported are sustaining a commercially viable business and sourcing work at the right price. These are key aspects in ensuring the sustainability of any business, these factors are further exacerbated by the challenge of sustaining their skills base through effective recruitment, retention and training.

The nature of the sector means that it is heavily reliant on global demand and the economy. Many businesses cited that customer demands were a key driver for them, this is coupled with fluctuations in commodity prices such as oil, gas and steel and the strength of UK Sterling against US Dollars or Euros.

A further driver which has substantial effects on outputs and the workforce is changing technology and the modernisation of engineering processes. One business stated;

'We are a traditional engineering company with labour intensive processes and a lack of availability of a skilled workforce. We need to improve technology to increase business efficiency and profitability. Newer machinery has the potential to be operated by semi-skilled staff.'

Underpinning all of these factors is of course legislation and general political directions, this is especially a consideration for those business operating in the Energy and Environment sector.

Difficult Roles to Recruit

The majority of employers engaged with stated that they have faced difficulty in recruiting some roles, these are detailed below;

Small	Medium	Large
Technical Staff	Project Management	Technical Valve Engineers
Office Administrator	Construction Management	High Tech Engineers
Skilled Engineers	Estimators	Maintenance Planners/Schedulers
Design Engineers	Engineering	Temporary Craft Labour
Higher Management	Technical	

The Work-Readiness of New Entrants to the Sector

Just over half of those employers engaged with reported that new entrants to the sector that have only recently left school or college are not work ready. Many employers try to limit the likelihood of employing such an individual with a recruitment process that is thorough and specifically designed to identify such traits.

The most commonly reported skills that are associated with work-readiness for these companies are soft skills[39], literacy and numeracy skills and a good work ethic; *'Resolve, a proper work-ethic and far-improved basic skills (literacy, numeracy and communication skills), so a mixture of basic skills and culture.'*

Contributory factors to these issues include the lack of work experience available to these entrants whilst learning which is then worsened by the nature of provision offered by schools and colleges – with some of it not being fit for purpose or specialist enough. As a result some employers resort to internal training;

'Individuals without work experience can lack some of the soft skills. Due to the nature of our machine shop internal training is necessary with colleges not offering training specific to all areas of the engineering sector. Focus tends to be on skills which can more easily be taught i.e. does not require expensive resource.'

Evidence from the cluster groups also suggests that there is a cultural divide between the education environment and the workplace with new entrants struggling to adapt to the longer hours and high levels of scrutiny. This has been highlighted as an area of competitiveness with some countries having longer and more intensive educational timetables.

Numeracy, Literacy and ICT Skills

Close to quarter of those employers engaged with felt that their workforce did not possess the required numeracy, literacy and ICT skills needed to fulfil their roles;

'Even degree level employees come in with poor spelling, grammar and punctuation, especially against foreign associates for whom English is a second language! As for literacy, almost no one under the age of 35 can manage basic mental arithmetic, let alone properly understand ratios, percentages, calculating margins, etc. We have to teach our administrators basic maths in their first months here.'

The evidence also indicates that whilst some employers reported that their workforce does possess the desired competence in numeracy, literacy and ICT there are instances where the level of competence is highly dependent on the level of academic achievement of a given individual.

A few of the employers reporting no short-fall in competence whatsoever indicated that they have stringent recruitment procedures which ensure these skills are present in individuals to the desired level.

'Assured by selective recruitment procedures which predicate a required standard of literacy, numeracy and ICT according to the job role. The apprentices acquire these skills within their frameworks, and, where necessary, we provide additional support to ensure that they meet the standard required'

[39] The Collins English Dictionary defines this term as 'desirable qualities for certain forms of employment that do not depend on acquired knowledge: they include common sense, the ability to deal with people and a positive flexible attitude.'

Welsh Language

The vast majority of respondents reported that the Welsh language is not important at all to their business.

Whilst many indicated that the Welsh Language was a crucial part of national culture and identity it offers no apparent benefits to businesses operating within the sector. A vast majority of the products manufactured are exported and therefore working on a global stage creates very little demand for the Welsh language. However, it was identified within the cluster groups as being useful for public consultation and engagement within the energy sector.

'Almost exclusively export our goods and no business, even with local suppliers, is undertaken in Welsh. Everyone speaks English as the business language, even when it is their second language.'

'We recognise that we play a major role in the Welsh economy, but as our customers range across the UK, Europe and the rest of the world, there is very limited business needs for employees to develop their Welsh language skills.'

Barriers to Training

The nature of the sector requires the renewal of training on a regular basis. This exacerbates some barriers such as cost which many are reporting are increasing regularly. Associated with this is the introduction of the Apprenticeship levy which is a source of concern and confusion for many employers.

There are many opportunities for businesses to access subsidised training, however employer feedback indicates that it is very difficult to gain clear information on what these are and how they can access them.

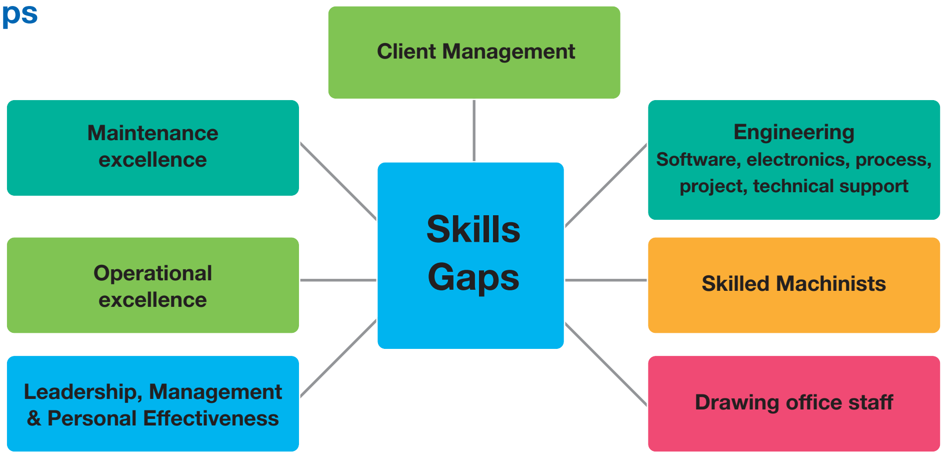
Several are resorting to developing their internal training offer to reduce their reliance on external providers;

'Our main barrier is cost of release of employees to attend training programmes, followed by the cost of training. We typically see that the cost of training set by external providers is on average 3 times higher than what we can deliver internally, which has influenced our strategy to insource training. > 90% of our training needs are now delivered internally.'

For those businesses that are located in rural areas sourcing training that is fit for purpose and relatively local is a challenge, this once again worsens the cost element which many find to be a significant burden.

'The costs are forever increasing, but unfortunately, within our industry we require certain training or to renew certain training every so often. You aren't always guaranteed to have grant support either. Another issue we also have is due to our workload and the location of where our employees are working it isn't easy to arrange/book training to suit.'

Skills Gaps



Required Support to Grow and Develop

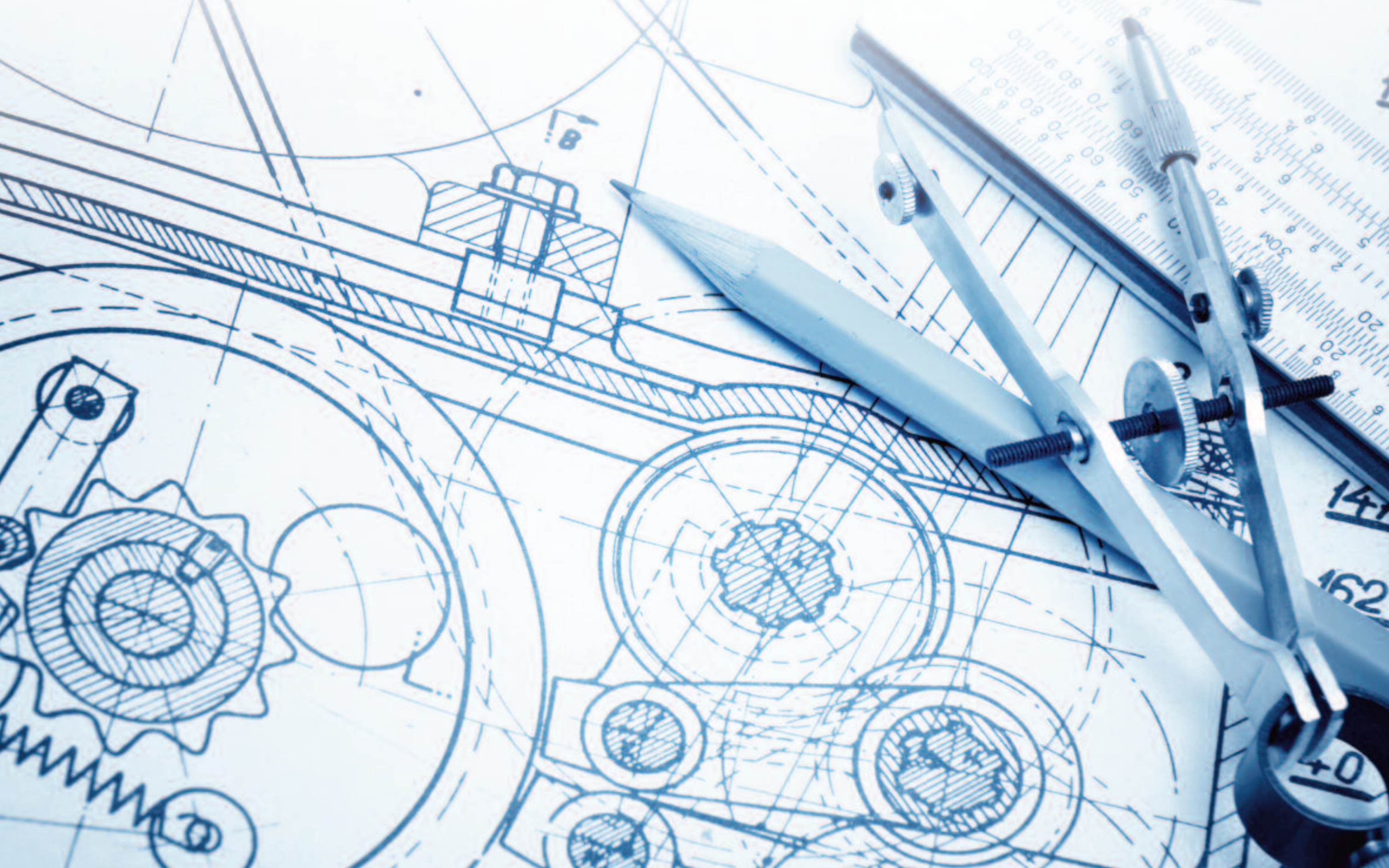
Businesses stated that they require support with the following areas;

Training Apprenticeships
Planning Procurement
Recruitment Financial
Materials
Regulation Succession

Identified Priorities

The below have been identified by the cluster group as priority areas for the region:

- **Develop an action plan to improve basic skills including literacy and numeracy and the attitudes and ethics of new recruits required across the sector.**
- **Develop and implement a strategy to promote careers in engineering at all levels, with specific reference to Apprenticeships at all levels – post GCSE, post A-level and post degree, using role models to illustrate the opportunities within the sector. Include a focus on females into engineering.**
- **Use the role models identified above to illustrate the transferability of skills in matching the labour supply and demand for major projects and how this will prevent duplication and reduce costs.**



3.2 Construction

Defining the Sector

The Construction sector is defined as being engaged in the preparation of land and the construction, alteration and repair of buildings, structures and other property. For this reason, the sector is one of importance globally, nationally and locally.

The latest statistics indicate that Wales is expected to see an annual average output growth of 6.2% between 2017 and 2021. This growth in Wales is expected to exceed that for the UK as a whole by a considerable margin of 1.7%.[40]

Regionally, the sector employs approximately 35,400 people in 4,180 local business units. On average this level of employment is forecast to grow by 2.7% per year, with demand expected to be strongest for Construction trades supervisors and civil engineering operatives.[41]

3.2.1 Employer Evidence

Recruitment and Retention

A concern expressed by employers is the detrimental effect of the perceived uninformed and poor perception of the sector held by learners and parents. This restricts the number of talented individuals recruited to the sector. An increased effort to positively promote the sector and the opportunities it presents by careers advisors and schools generally could mitigate this issue.

Furthermore, evidence shows that although many people are training in the sector, a large proportion are not progressing, this is termed as a pre-Apprenticeship 'drop-off'. Too many learners are entering at level 1 and not continuing their training on completion. As a highly vocational sector there is therefore a need to increase efforts in the promotion of Apprenticeships as a viable and rewarding training route.

The lack of attraction of a high calibre student to the sector is a further issue, an increased focus on quantity of learners over quality of learners poses challenge as the sector fails to recruit and then retain the talented individuals needed for the progression and development of the sector.

These issues are particularly pertinent given the ageing nature of the sectors' workforce. CITB states that more than 400,000 individuals will retire from the sector in the next 5-10 years. Failing to recruit new entrants to the sector therefore would be potentially incredibly damaging to the sector and its skills base.[42]

- *'19% (equivalent to 406,000 people) of the UK Construction workers aged 55+ are set to retire in the next 5-10 years;*
- *24% (equivalent to 518,000 people) of UK Construction workers aged 45–54 are set to retire in the next 10-20 years;*
- *37% of the UK Construction workforce is self-employed and 23% (equivalent to 182,800 people) of those are set to retire from the industry in the next 5-10 years.'*

[40] *http://www.citb.co.uk/documents/research/csn%202017-2021/csn-wales.pdf*
[41] *http://www.citb.co.uk/documents/research/csn%202017-2021/csn-wales.pdf*
[42] *http://www.citb.co.uk/news-events/uk-construction-skills-time-bomb/*

Suitability of Skills Provision

Due to the nature of the sector many employers feel that the industry and the learner would benefit from an all industry approach to qualifications. This suggests that qualifications would encompass elements of all trades, allowing learners to develop a broad range of skills and therefore an opportunity to identify the trade that they have a genuine passion for in an informed manner.

In conjunction with this it is felt that learners should be provided with the opportunity of learning on a 'live site'; an immersion in this style of learning would increase their confidence and their employability. This would serve in some part as a solution to the lack of work experience offered to learners, the ever increasing ad hoc approach currently evident is to the detriment of the learner and the industry as a whole. The 16 hours a learner currently spends learning a trade is not enough for a full time course, the industry suggestion is that an extra six or seven hours is added to this specifically for work experience.

Employers reported that the soft skills of learners within the sector need to be developed; primarily communication and team working skills. Both are essential skills within the Construction industry due to the nature of the work. This would also improve the work-readiness of individuals and reduce the need for employers to further develop these skills on employment at their expense.

Opportunities and Challenges

There are both significant opportunities and challenges within the sector and finding a balance is essential if the sector is to further develop and thrive in the region. The prospect of Brexit is particularly concerning as employers and industry experts predict that a portion of the workforce will be lost to Europe creating significant skills gaps. On a more local level the movement of skilled and talented labour to England poses further challenges. A combination of the two could be potentially significantly damaging.

An additional challenge for the sector is the exclusionary nature of some procurement processes. These processes prohibit significant major indigenous companies from winning work on larger developments which more often than not are the high value jobs. Clearly, these restrictions inhibit the growth of companies and therefore their abilities to employ more people.

A significant opportunity identified by employers is the prospect of re-training individuals from other sectors such as Financial and Professional Services. This could become a more common practice as technological advancements change the way work is undertaken within other sectors. The Construction sector needs to be fully prepared to capitalise on these opportunities as they present themselves.

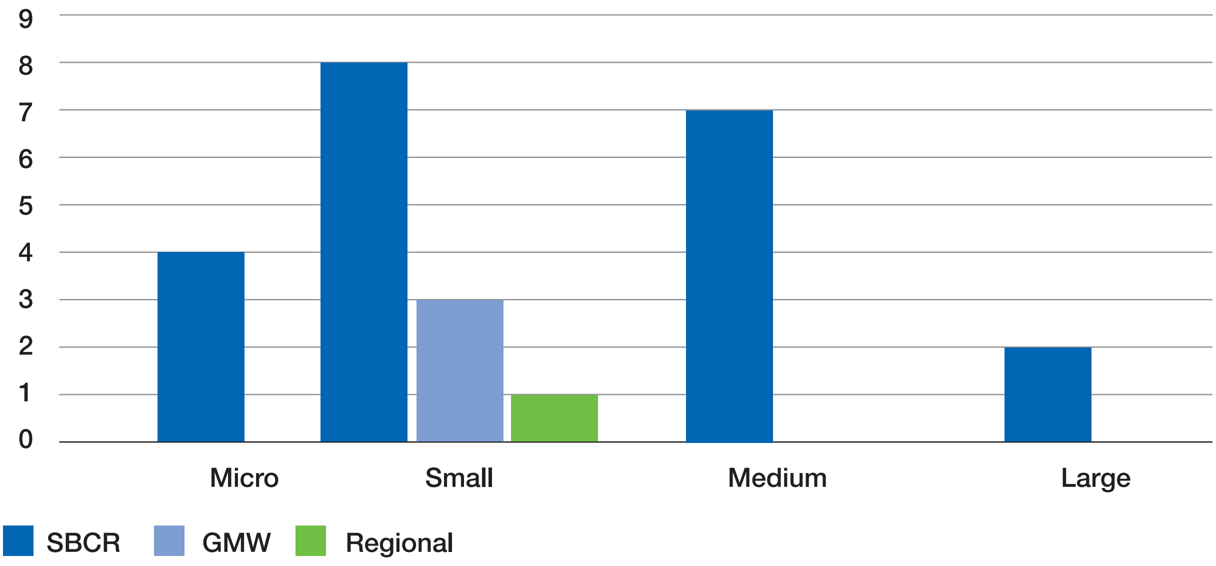
Skills Gaps

It is the view of the Construction industry cluster group that there is a surplus of individuals studying carpentry within the region. Of greatest concern is the lack of evidence to indicate that there are enough vacancies or jobs to support this. There is demand however, for plasterers, painter and decorators, civil engineers, estimators and quantity surveyors across the sector.

A key priority for the sector should be increasing the essential skills of learners. Many enter the sector unable to uphold a basic level of numeracy and literacy which causes pressure on the employer to ensure that these skills are developed. This has a negative effect on productivity and is time consuming. This should be addressed at primary and secondary school levels.

3.2.2 Primary Research Analysis

Response Profile for Construction



Challenges and Drivers of Change and Demand

The most significant challenge reported by those employers engaged with is sourcing a suitably trained workforce and quality labour. This lack of access to desired individuals exacerbates other challenges such as securing work and ensuring that work is completed in line with client expectations.

Recruitment is noted as a challenge for the majority of businesses, underpinned by a lack of fit for purpose training provision;

'Recruitment so that our organisation is sustainable for future needs. The Construction sector is diverse and training and qualification needs need to be fit for purpose.'

This diversity is due in part to the increasing demand for the use of new materials and methods, suggesting that training may become out of date if it is not updated as and when these advancements occur. Securing work of a high value is also reported as being a significant challenge for some businesses; this is worsened by tendering and procurement processes.

'Securing work is proving ever difficult due to aggressive and competitive tendering by other contractors. Constant procurement hurdles we have to jump through - P.Q.Q. documents and questions being asked which would have been covered by squib document.'

Additional challenges cited include the amount of paperwork and health and safety considerations to take into account before commencing work when it is acquired. These factors are of course dependent on successful planning applications and project funding; both of which are factors noted as further challenges for some. Furthermore, external factors such as the housing market can have a substantial effect on businesses within the Construction industry. This is coupled with influences such as; wage inflation, material inflation, competition and credit control.

Additionally, *'Government protocols i.e. B.I.M, changes to current legislation in terms of H.S.E, ISO management and quality standards'* these can all have significant effects on the way a business operates and are all considerations for companies operating within this sector.

Difficult Roles to Recruit

The vast majority of employers engaged with the process reported that they experienced difficulties in recruiting for specific roles. These roles are detailed below;

Micro/Small	Medium	Large
Young engineers	Quantity Surveyors	HGV Drivers
Engineering Trades	Site Operatives	Skilled Operatives
Qualified electricians	Contracts & Project Managers	Engineering/ Commerical Staff
Masons	Trade, Technical & Professional Roles	
Bricklayers		
Quantity Surveyors		

The Work-readiness of New Entrants to the Sector

The lack of work experience offered to learners during their courses poses many issues for employers with just over half of those surveyed reporting that new entrants to the sector are not work ready. A particular criticism is the very limited experience provided to learners in the use of hand tools, this results in a learner who has the accredited qualification required for the role but no idea of how to put this knowledge into practice on a live site.

'Education programmes for trade, technical and professional roles do not fully equip applicants for the workplace.'

'Many apprentices between 16 and 18 years of age lack skills which involve the use of basic hand tools.'

There are examples of good practice to be seen in the region, such as initiatives which focus on the development of Apprentices, however, by the employer's own admission such initiatives are limited and more personal development is required from the learners' perspective before they are able to fully contribute to business operations.

A model currently being delivered in Bryngwyn and Glanymor secondary schools sees learners developing their level 1 and 2 qualifications in Construction in partnership with Coleg Sir Gar. A purpose built site located at the school allows these young people to develop their practical and on-site skills. This aligns well with the demand from employers for learners to have more 'hands- on' experience on leaving education.[43]

Numeracy, Literacy & ICT Skills

Analysis indicates that the standard of numeracy, literacy and ICT skills vary significantly between business to business. The majority feel that their workforce is competent in this area whilst others feel that they have severe short-falls. What is apparent is that some employers feel that the standard of these skills has been declining over the last 10-15 years. Consequently employers are having to source training for their newly employed staff

[43] *http://en.calameo.com/read/001824487ea7b9ac7d5af*

'As a company we have experienced for many years that the level of literacy and numeracy skills of individuals leaving school have been declining over the last 10 - 15 years. We have, working with the local college, given a number of our workforce time off work to attend numeracy, literacy and IT training which has helped them in work and with their home lives.'

Whilst a lack of these skills can cause some productivity issues, a small proportion of employers feel that soft skills such as good communication skills and a strong work ethic are more important for the sector and the type of work these companies undertake.

Welsh Language

The vast majority of employers engaged with rated the Welsh language as being very important or fairly important to their business.

Many of those that expressed the language as being fairly important stated that although it's important it is not crucial in the sector;
'I don't think it is crucial in our sector. I am a Welsh speaker and proud of my heritage and Welsh language and keen to promote the values and importance. Difficult to put a value to the language for our business when the practical skill is the main driver.'

Some feel that the use of Welsh Language is not important at all as there are *'not many fluent Welsh language speakers these days, everybody wants English speaking but Welsh is only a desirable skill not an essential skill.'*

Barriers to Training

A major issue for the sector is the perceived disconnect between industry, careers advice services and schools, this is to the detriment of the learner where very little of their learning is based on live sites.

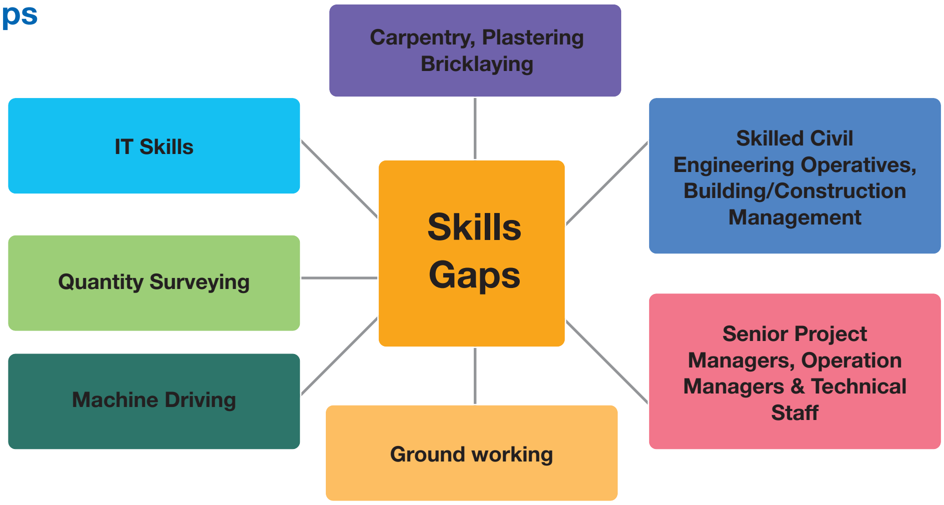
This of course results in an increased pressure on employers to release these individuals for the relevant training that they require, resulting in time becoming a significant barrier for employers. It is reported that releasing staff for training can be detrimental to the over-all productivity of that company on that given day.

There is a clear demand from employers for training to be more vocational;
'Training needs to be more apprentice based so people can learn on the job and gain experience rather than classroom taught books and paperwork'

Location and cost were also cited as barriers with employers finding it difficult to source fit for purpose training in their area which exacerbates the cost element.

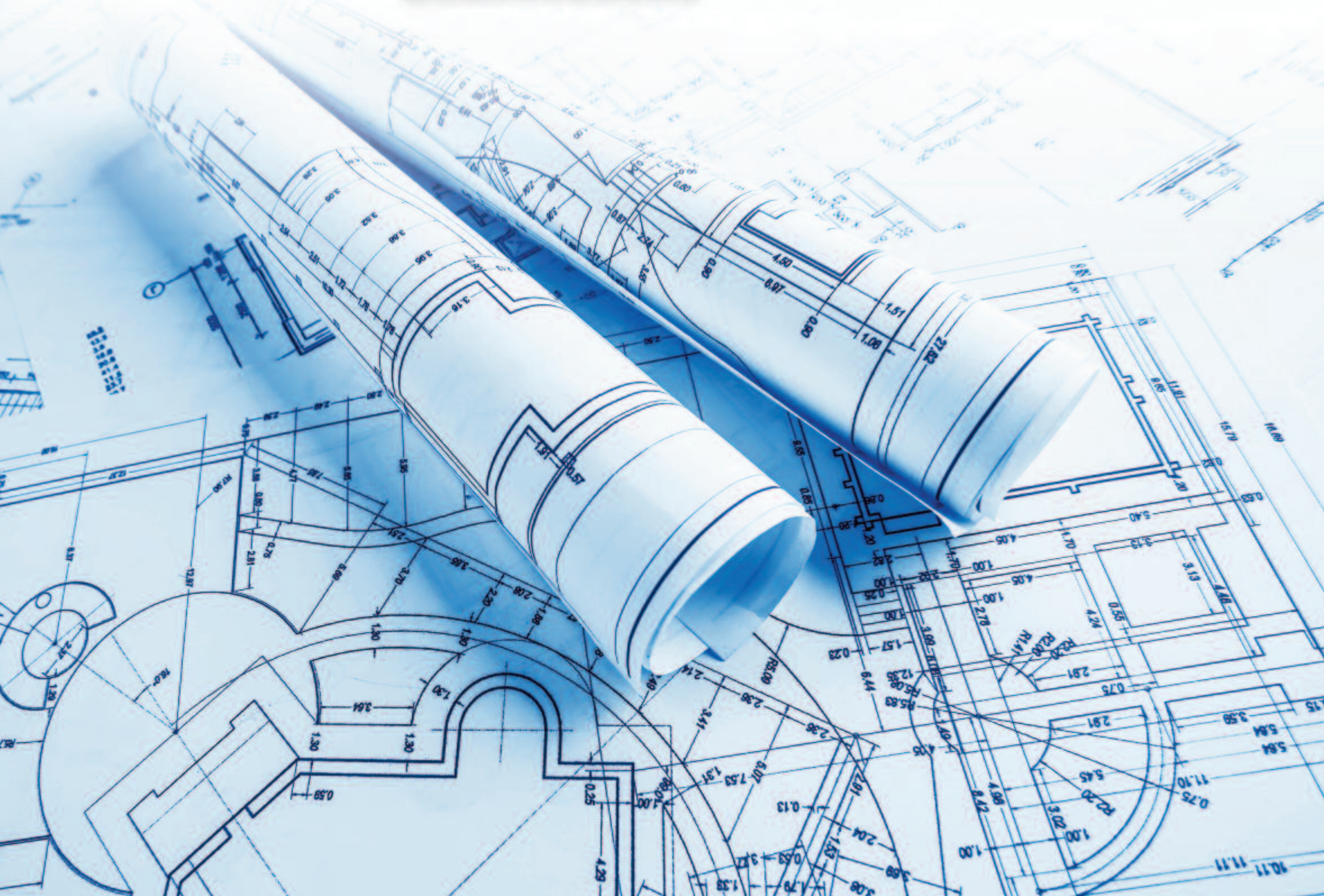
'We believe the current training setup is overly biased towards trade professions and is unnecessarily complex for both trainees and companies looking to train and recruit.'

Skills Gaps



Required Support to Grow and Develop

Businesses stated that they require support with the following areas;



Identified Priorities

The below have been identified by the cluster group as priority areas for the region:

- **Examples of good practice from around the region should be celebrated and further developed rather than 're-inventing the wheel'. The Cyfle Building Skills programme is one such example where the positive impacts for learners and businesses alike have been recognised through a Queen's award. Other organisations should be encouraged to engage and support the initiative to enhance a long term sustainable provision for the sector.**
- **Procurement procedures have a significant detrimental impact on SME's. In light of this there needs to be a review resulting in a consistency of approach to the procurement of products.**
- **Whilst it is recognised that the professional organisations such as quantity surveyors, architects and other consultants who are synonymous with the Construction industry have been categorised within the Financial and Professional Services Sector it is felt that the Construction professional organisations should be included within the Construction Sector as this will align with other training initiatives nationally such as the CITB Go Construct website and the local approach of professional Apprenticeships being piloted in September 2017. This also needs to be applied to the mechanical and electrical contractors so that a whole sector approach can be developed.**
- **The ever-increasing commercial nature of educational providers has taken the focus away from the provision itself with providers becoming more concerned with the quantity rather than the quality of learners. Alleviating this commercialisation would increase social conscience and place the focus back on the learner and develop true collaboration between the sector and training providers.**
- **The views in the recently published 'Modernise or Die: The Farmer Review of the UK Construction labour model' set out the need for the Construction industry to change in line with differing demands. Similar goals should be set for the education and training sector in partnership with employers with identified needs within areas such as, work experience, mentoring, civil engineering operatives, multi-skilling, technical and professional Apprenticeship progression which are currently being addressed outside of the main traditional core training routes.**

3.3 Creative Industries

Defining the Sector

A skilled workforce and a culture of creativity and entrepreneurship have contributed to the Creative Industries sector being the fastest growing in Wales. The sector is diverse, encompassing the following sub-sectors; advertising and marketing, architecture, crafts, product, graphic and fashion design, film, TV, video, radio and photography, IT, software and computer services, publishing, museums, galleries and libraries, music, performing and visual arts.

Across the region of South West and Mid Wales the sector employs approximately 12,100 people, an increase of 31% since 2006.

3.3.1 Employer Evidence

Recruitment and Retention

According to employer evidence there are two types of individuals employed within the Creative Industries sector; creative people and the deliverers of that creativity. Although the sector is a popular one with learners it is difficult to recruit individuals with the talent needed. This is a mix of both generally not having the desired skills within the region and not being able to recruit those individuals when they have the skills.

The careers advice given in schools is not fit for purpose with regards to relaying the vast range of opportunities within the sector. There are a number of specialist and interesting roles that learners are not aware of due to a lack of guidance. More needs to be done to ensure this advice is timely and truly representative of the sector, this could encourage more individuals to pursue a career in the sector.

Suitability of Skills Provision

The sector is fast paced and rapidly changing, with employers indicating that this creates challenges in the availability of provision that reflect these advancements. As a result, training is not meeting industry needs and therefore an over-reliance on large companies to up-skill and train individuals has emerged. This further substantiates the need for provision to be influenced by employers and industry themselves and not academics.

There is a need to introduce work experience back into schools and also into current FE and HE training provision. This would provide learners with that much needed practical experience which is overlooked. Examples of good practice where practical work based learning is paramount are the BBC, ITV and NFTS academies.

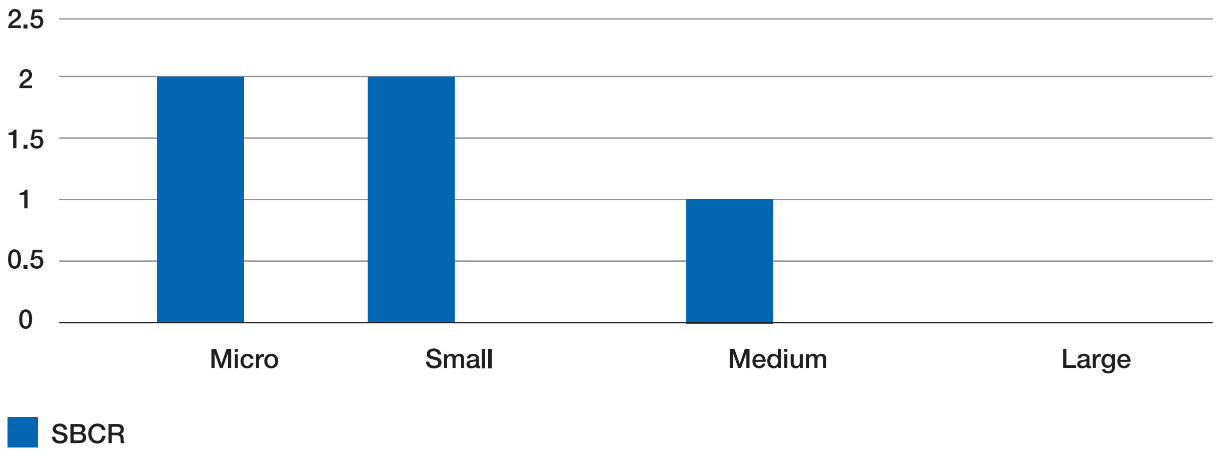
Opportunities and Challenges

A talent database detailing skills and knowledge would be beneficial to employers looking to recruit new staff and talent.

Likewise, promoting the use of Welsh Language in the sector is an opportunity both in terms of up-skilling individuals and also strengthening culture and further developing the sector's identity in Wales.

3.3.2 Primary Research Analysis

Response Profile for Creative Industries



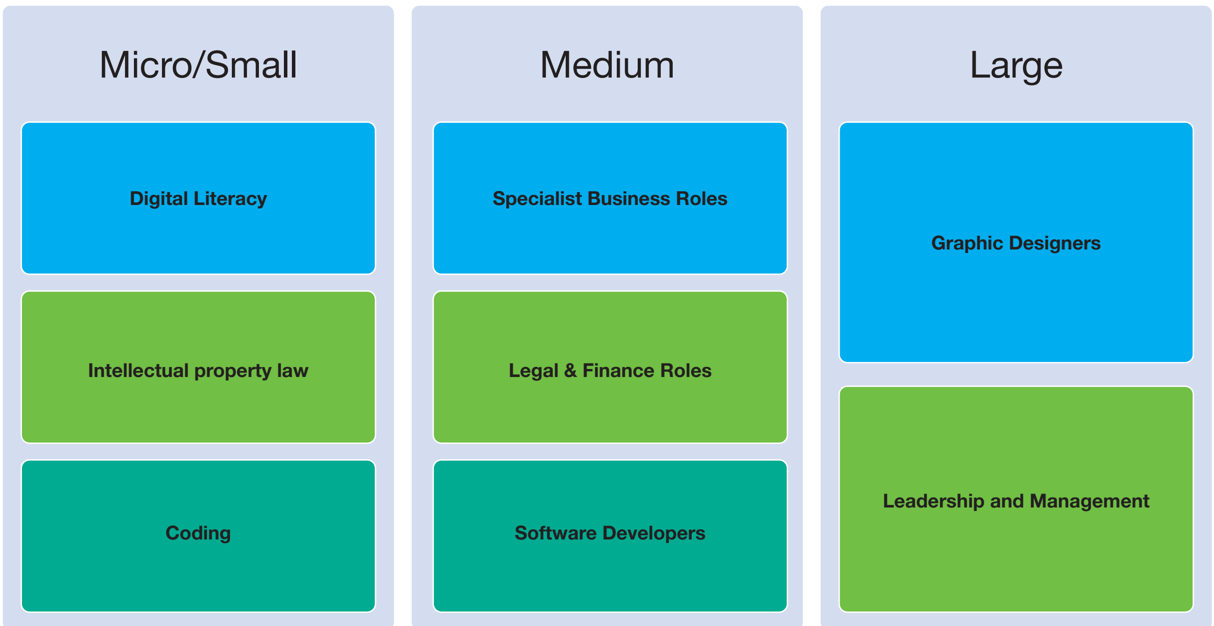
Challenges and Drivers of Change and Demand

Funding and financial pressures were reported by the majority of employers engaged with as the most significant challenges they face. This is both in a profitability sense and also in a developmental capacity where businesses would like to expand and grow. A co-operative retail operation stated that their;

'Main challenge is ensuring volume of sales leads to a retention of membership and covering our overheads'.

Similarly, funding was once again cited as the most significant driver of change and demand for those employers we engaged with. Reductions in funding can have a detrimental effect on the operation of these businesses operating within the sector.

Difficult Roles to Recruit



The Work-readiness of New Entrants to the Sector

The data indicates that the vast majority of those employers engaged with reported that new entrants to the sector are work ready. This is reported as being directly linked to the calibre and attitude of creative people, with individuals working in the sector possessing the desired work ethic and aptitude to learn.

Instances where individuals do not possess skills specific to a particular role are not seen as overly negative as these skills are developed easily with people who possess the right attitude and desire to learn.

Numeracy, Literacy and ICT Skills

On the whole respondents feel that their workforce possess the desired level of numeracy, literacy and ICT skills. One respondent stated; *'Most are graduates or apprentices and have high skill levels before we employ them.'*

Welsh Language

The majority of respondents stated that the Welsh language is very or fairly important for their business.

'We have a bilingual membership and seek to reflect that. We have Welsh speaking customers and like to show willing.'

Whilst this is the case, one business reported that this can sometimes prove challenging;

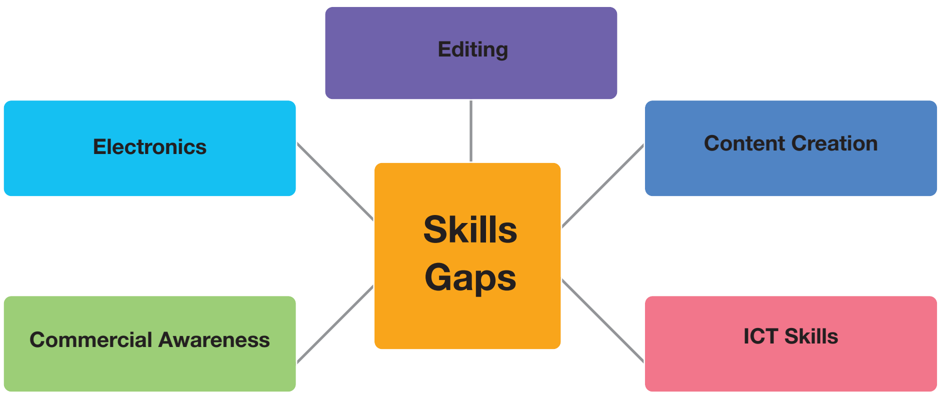
'We adhere to the Welsh Language Policy of our Local Authority. This is not always simple only 3 of our team speak Welsh. Costs of translation are prohibitive and in many cases mean that we cannot.'

Conversely, a business which stated the Welsh language was of no importance to their operation relayed that this was largely due to the location of their customer base.

Barriers to Training

Employers spoken with stated that barriers to training are not commonplace in the sector although suitability of skills provision is an issue in some instances.

Skills Gaps



Required Support to Grow and Develop

Businesses stated that they require support with the following areas;

Funding
Training
Recruitment

Identified Priorities

- **Develop staff to transition into work to develop new skills.**
- **Ensure that the supply meets demand and that the training meets industry requirements e.g. ICT training is changing quickly but the delivery is not moving as fast.**
- **There needs to be a co-ordinated approach between industry and education on where industry needs to go and how this is co-ordinated.**

3.4 Food and Farming

The Food and Farming sector is a significant part of the Welsh economy encompassing a large part of the food and drink supply chain and includes primary production and agriculture as well as the manufacturing and preparation of food and drink. This is an area where traditionally the region has a strong presence and has a number of established brands and producers.

The Agriculture, Forestry and Fishing sector employs around 24,900 individuals at a regional level. In addition, the same statistics indicate that 106,600 individuals are employed within the Wholesale, Retail, Transport and Hotels and Food sector.[44] Although it is not possible to determine what proportion of this total relates solely to the food sector, the significant over-all total is a good indicator that the sector is one of importance in terms of regional employment.

Major opportunities for growth and development across the region include;

- Food technology and food processing have been identified as areas of importance for the Haven Waterway Enterprise Zone. A new food park could create up to 1,000 jobs with the development being targeted at both large-scale vegetable producers, food processing, and dairy product suppliers as well as specialist smaller scale outlets and start-up businesses.[45]
- There is well-established production and processing capacity across the Mid Wales region with a number of regionally important companies situated in the counties, including; Dunbia, Randall Parker Foods, Rachel's Dairy etc.
- Furthermore, Horeb is home to one of three Food Innovation Wales locations in the region at the Food Centre Wales.
- Aberystwyth is also home to several important Welsh Agricultural organisations such as Organic Centre Wales and Hybu Cig Cymru.
- One of the largest and most recently developed UK livestock markets is situated in Welshpool.
- Development of a Veterinary School in Aberystwyth, (which is also aligned to the Life Sciences' sector).

3.4.1 Employer Evidence

Recruitment and Retention

Many employers and industry experts feel that the perception of the sector amongst learners and parents creates challenges in the recruitment of new entrants. As a highly vocational sector a stigma around Apprenticeships exacerbates this poor perception making it difficult to attract talent to the sector.

Raising the profile of Higher Apprenticeships as being equal to degree courses amongst parents and learners would increase interest in the training courses available within the sector. A career pathway tool coupled with this would help raise the profile of the sector as one full of opportunity and progression.

The rural location of some businesses also poses issues for recruitment and also then retention further in the future, this coupled with poor public transport and shift patterns makes it very difficult for individuals to sustain employment within the sector.

A skills assessment conducted by Lantra into the UK Land-based and Environmental sector indicated that between 2010 and 2020 the sector is forecast to require 595,00 more people at a UK wide level.

[44] *https://statswales.gov.wales/Catalogue/Business-Economy-and-Labour-Market/People-and-Work/Employment/Jobs/Whole-Workforce/workplaceemployment-by-welshlocalareas-industry*
[45] *http://www.pembrokeshire.gov.uk/content.asp?nav=101,2212&id=34286*

These people will be required to possess the following qualification levels;

- 100,000 people at qualification QCF levels 7-8,
- 245,000 people at QCF levels 4-6,
- 61,000 people at QCF level 3,
- 97,000 people at QCF level 2,
- 83,000 people at QCF level 1,
- 9,000 people with no qualifications.

'The rise in demand for people in skilled occupations suggests that there will be an increased requirement for skills such as leadership/management, finance, sales and marketing. According to Lantra's recent study of provision and sector requirements for learners ages 14-19, employers in the sector find it difficult to get recruits with the skills from the current education system. Technical, practical, and job-specific skills are particularly important and some of the skills that employers have greatest difficulty in finding.'

Suitability of Skills Provision

The majority of courses offered do not always add value to the business, as a response some businesses are developing their own internal training to address the skills needs that they have identified. Accredited courses are not always necessary however there are often no other options available. Furthermore, many courses are not delivered in Wales which means many employers have to use providers in England at an increased cost.

There is a need to align Apprenticeship frameworks to the requirements of employers and learners. A lack of connection between providers and industry results in the delivery of qualifications that are not fit for purpose. As a result, mentoring roles are being created in some businesses to account for what providers have not covered. Furthermore, many employers prefer NVQ's as a form of training as the assessors spend time within a given business which develops a relationship.

An additional solution to this issue suggested by industry is the creation of internal training academies. This would allow employers to provide individuals with the exact skillset that they require to move the business forward. This would be particularly beneficial and assist with succession planning and general CPD. In light of this, funding should be directly fed into the businesses to develop these academies rather than to providers.

The basic skills levels (especially numeracy and literacy) of new entrants to the sector are a significant concern with employers having to invest time in training to develop these skills. This is a particular issue at age 16, however it remains a concern across all levels. A suggested solution from industry is that the numeracy and literacy elements of certain courses are built into the practical elements of the course.

Additionally, employers feel that there is a lack of awareness of the funding that is available to them for training and up-skilling their staff. When there are skills gaps within an organisation many aren't aware of what support is available to them to mitigate this issue and therefore develop their staff and their business.

Opportunities and Challenges

The proposed Apprenticeship levy will almost certainly pose a challenge for some employers, a perceived lack of information from WG exacerbates the uncertainty that many employers feel.
Furthermore, in some instances the sector does rely on European labour therefore the potential effects of Brexit could result in the loss of European staff. For example, individuals with the desired butchery skills are difficult to recruit locally for some businesses therefore they recruit individuals from Europe.

Recently the Farmers' Union of Wales has stated that the farming industry risks becoming "stagnant" unless more is done to encourage the younger generation into the sector. Latest figures indicate that the average owner of a farm holding in Wales is over 60 years old with only 3% under the age of 35. This is particularly concerning, as a result, the FUW are calling on WG to introduce an action plan to address this, centred on three important elements which need to be addressed;

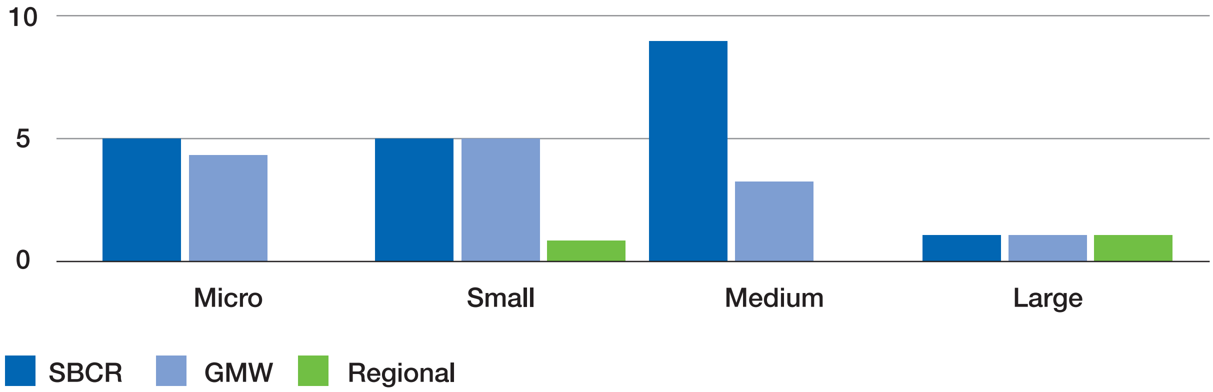
- A financial incentive to help older farmers to retire in the hope of freeing up land
- Reversing the loss of council-owned holdings
- A financial incentive which would encourage older farmers to retire, creating room for younger new entrants to the sector.[46]

Skills Gaps

Recruiting qualified chefs in the region is a significant challenge as is recruiting qualified HGV drivers.

3.4.2 Primary Research Analysis

Response Profile for Food and Farming



Challenges and Drivers of Change and Demand

The recruitment for both skilled and non-skilled roles was reported as a significant challenge for employers. This is especially prevalent for businesses that would like to expand and move the business forward.

This is particularly concerning given the ageing nature of the sectors' workforce. A failure to attract enough new entrants to the sector with the desired skills could potentially be incredibly damaging for the sector and its skills base.

At a sectoral level the evidence indicates that employers feel that there is a severe lack of specific training within the Food and Drink manufacturing and processing sectors in Wales.

This lack of fit for purpose provision is of course a contributing factor to the recruitment challenges faced by employers.

One business stated that location is the most significant challenge for them;

'Being located in a National Park places severe restrictions on our capability for expansion, as their planning rules tend to be much stricter than those of Local Authorities; we are not therefore on a "level playing field" with our competitors.'

[46] *http://betternews.co.uk/royal-welsh-show-fuw-urges-help-for-young-farmers*

Furthermore, external factors such as inflationary pressures, exchange rates and commodity prices have a significant effect on productivity and profitability.

The table below indicates the drivers of change and their associated skills implications identified by Lantra specifically for the Land Based and Environmental sector at a UK level. [47]

Driver of Change	Associated Skills Implications (with demand for);
Changing consumer demand	**Business planning, Leadership, Marketing skills, Market analysis, Woodland management, Chainsaw proficiency, Health and safety, Contract negotiation.**
Regulation & Government	**The application of veterinary medicines, Species identification.**
Environmental Change	**Nutrient planning and application practice, Knowledge of new varieties of feedstocks, Crop management availability, Pesticide application, Water management, Nutrient management, Woodland planning, Knowledge of new species knowledge, Sustainable forestry, Differential application, Manure management plans.**
Values & Identities	**Carbon foot-printing, Understanding consumer markets, Negotiation, Complying with complex routes to market, Managing buyer relationships.**
Economic Factors	**Monitoring soils, nutrient level-sand disease surveillance, Skills to raise capital.**
Technological Drivers	**ICT (including use of GPS systems and bespoke applications), Scientific knowledge and understanding, Risk management.**

[47] *https://www.lantra.co.uk/sites/default/files/The-UK-Land-based-and-Environmental-Sector_-Skills-Assessment-Update-Spring-2014_0.pdf*

Difficult Roles to Recruit

Analysis indicates that just over half of those employers engaged with reported that they experience difficulty in recruiting for some roles, these roles are detailed below;

Micro/Small	Medium	Large
Brewing Staff	Engineers	HGV Drivers
Technical Staff		Butchers
Office Administrator		Finance/Sales/HR
Food Engineers		Engineers
Food Scientist		
Design Engineers		
Higher Management		
Chefs & Kitchen Assistants		
Engineers		

The Work-readiness of New Entrants to the Sector

The majority of respondents stated that new entrants to the sector are not work ready. In many instances specific reference is made to young school leavers who are unaware of what is expected of them within a working environment.

'Few possess the disciplines needed for the workplace - lack commitment, reliability and interest.'

'No real understanding of work ethics and drive needed to achieve success.'

Strong work ethic and a positive attitude are cited as skills that are most important in new entrants and where these are not present further training is required;

'We have in the past had a number of young 'apprentices' join the team. We have found that they can take some time to adjust to the working environment and working life. In one case we were at the point of potentially performance managing an individual due to his work ethic and motivation. However over the course of a 6 month period during which he was mentored and closely managed on a weekly basis he has turned things around.'

Numeracy, Literacy & ICT Skills

There are variations across the sector in terms of these skills, with some employers reporting no issues and some conversely reporting severe issues. There appears to be no pattern to these results with the whole spectrum of business (regardless of their size and location) experiencing difficulties.

Where companies reported that they do not have issues, many stated that in the majority of cases the level of these skills is adequate across their workforce and if necessary further internal training is provided.

A notable example of where a large company is experiencing difficulties in this area is where over 60% of their workforce are Eastern European. Understandably this would cause challenges especially given that their first language is not English. This company is especially concerned about the potential effects of Brexit stating;

'…the majority of our workforce is Eastern European. Any barriers to the movement of labour will majorly affect our business.'

Welsh Language

The evidence indicates that the importance of Welsh language skills to businesses is highly dependent on the profile of their workforce and their location.

For instance, the use of Welsh for one company is obsolete given that the majority of the companies they work with employ migrant workers (especially during peak times in their manufacturing). This increases the demand for the use of English as a first language.

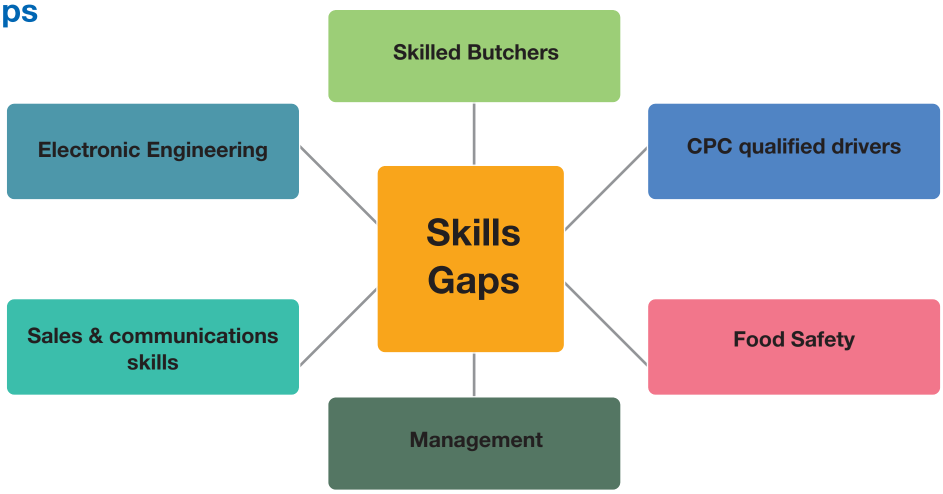
On the contrary, one business stated that; *'Around a third of the staff are able to speak Welsh and it is an important part of the business culture. We try and reflect our Welsh identity wherever possible and part of this is use of Welsh signage and having Welsh speaking staff available to customers who prefer to conduct their business through the medium of Welsh.'*

Those businesses that rated the language as being 'fairly important' reported difficulties in recruiting suitably skilled staff, with one stating; *'We do use the Welsh language in some of our marketing communications but do not have the skills to offer fully bi-lingual service to our customers and stakeholders.'*

Barriers to Training

The vast majority of respondents stated that they do not experience barriers to training. The only gaps in provision reported were in English language training due to the times provided, however this is not overly detrimental for that business.

Skills Gaps



Required Support to Grow and Develop

Businesses stated that they require support with the following areas;

Training
Perception
Regulation
Brexit
Financial
Recruitment
Bureaucracy

Identified Priorities

- **The creation of training that is fit for purpose with bespoke elements to meet the needs of employers and the industry as a whole. This includes on-going training which would support in staff retention, which is currently a significant issue.**
- **The perception of the sector needs to change amongst learners and parents. More engagement with schools is required to ensure that the sector is portrayed as one that is full of potential and opportunity. This would attract young entrants to the sector and help to alleviate the pressure of an ageing workforce.**

3.5 Health and Social Care

The Health and Social Care and Early Years and Childcare sectors are an important element of the foundational economy. Supporting health and wellbeing across all age groups as well as being a significant size sector in employment terms, the services that they provide enable parents, carers and individuals to work. The sectors have been identified as an area of significant growth for the region due to a rapidly ageing population and a demographic profile which has a greater number of older people than the UK average. In Wales, the number of people aged 65 and over is projected to increase by 292,000 (44%) between 2014 and 2039. This will lead to an increased demand for health and care skills. WG's pledge for 30 hours free childcare will create an increased demand for childcare, which will affect the early years and childcare workforce. It is important to highlight the differences between the Health and Social Care sectors which can have wide ranging and differentiating skills needs and challenges.

Health

NHS Direct employed staff

The table below outlines the number of directly employed NHS staff by local health board area.

	Abertawe Bro Morgannwg	Hywel Dda	Powys Teaching LHB
Medical and dental staff	1,237	634	29
Nursing, midwifery and health visiting staff	7,702	3,977	861
Administration and estates staff	2,939	1,796	605
Scientific, therapeutic and technical staff	2,569	1,471	295
Health care assistants and other support staff	1,571	1,344	189
Other	22	12	2
Total	**16,040**	**9,234**	**1,981**

Source: StatsWales - NHS Staff by staff group and year – March 2017 [48 49]

The table highlights that there are over 27,000 individuals employed within the NHS in the region across a wide range of disciplines, including a large number of non-medical positions. The largest individual classification is within the 'nursing, midwifery and health visiting staff' with a total of 12,540 employed within this area.

Social Care

In South West and Mid Wales:

- Around 23,700 people work in social care,
- 3,277 work in early years and childcare,
- From 2020, around 5,900 domiciliary care workers will be required to register with specified qualifications,
- 1 in 5 Apprenticeships are in social care – that's 2,660 people,
- 541 private and third sector organisation provide care services,
- 14% of the social care workforce can speak Welsh, compared to 24% of the general population
- £500m is invested in social care services every year, [50]
- There are 800 social care vacancies.

Social care safeguards and protects children and adults of all ages, who may be at risk of harm due to their vulnerability. It helps people live their lives comfortably, particularly those people who require a certain degree of extra practical and physical help.

The WG has introduced a range of legislative reforms which aim to transform the services people receive and hence the skills required of the workforce. The Social Services and Well-being Act places greater emphasis on professionals listening to better understand "What Matters" to individuals and their carers, who may need care and support or protection from potential harm. The Regulation and Inspection of Social Care (Wales) Act will mean that more workers will be regulated and qualified, further improving the quality of support provided. This includes around 5,900 domiciliary (home care) workers in this region.

The sector is a major employer in the region with an estimated workforce of around 23,700 workers. These workers are located in a variety of different settings, as noted in the table below[51]:

Social care setting in SWMW	Estimated total number of staff
Central Management and Support	800
Social Work	2,100
Domiciliary Care	5,900
Residential Care	7,500
Day and Community Services	3,100
Mixed*	4,200
Total	**23,700**

[48] https://statswales.gov.wales/Catalogue/Health-and-Social-Care/NHS-Staff/NHS-Staff-Summary/nhsstaff-by-staffgroup-year

[49] General practitioners and some dental practitioners are not counted as they are contracted staff and therefore not directly employed by the NHS, information is also not provided for the ambulance service as these figures exist at a national level only

[50] Social services revenue expenditure by client group, Welsh Government

[51] Data from Local authority social services staff numbers, Welsh Government, combined with data from the Social Care Workforce Development Programme data collection of staff working for services commissioned by local authorities.

Early Years and Childcare

802 organisations provide early years and childcare services in South West and Mid Wales. 3,277 people work in the sector – 446 as childminders and 2,831 in children's day care.[52]

	Number of providers	Workforce
Childminders	384	446
Children's day care	418	2,831
Total	**802**	**3,277**

High-quality early education and childcare has an important role in supporting greater long-term benefits for children and strongly influences their future life chances. The right early education and childcare can help to tackle some of the more entrenched issues that result from living in deprivation, including low skills and poor health that will take time to overcome. Fundamental to achieving high quality early years and childcare provision is a diverse and skilled workforce. The WG's 10 years workforce development plan for early years, childcare and play; due to be published in November 2017, is anticipated to aim for a more qualified and professional workforce.

Accessible and affordable childcare enables parents to work and train which can help them contribute to the wider economy.

3.5.1 Employer Evidence

Recruitment and Retention

Employer evidence indicates that both recruitment and retention are significant issues for the Health and Social Care and Early Years and Childcare sectors. Workforce planning on a national and regional scale is seen as of critical importance to the future development of the sector.

[52] *Care and Social Services Inspectorate Wales*

An ageing workforce in Health and Social Care is seen as a critical factor with a high leaver/retirement rate which is exacerbated by the limited number of young new entrants to the labour force to counteract the loss of qualified and experienced staff.

Factors contributing to the low number of new entrants include;

- Attractiveness of the sectors as an employer, poor perceptions regarding pay/conditions, etc. Coupled with a lack of awareness of the range of job roles within the sectors.
- Lack of awareness of progression and entry routes into the health and social care, early years and childcare sectors.
- 'Professional boundaries' are seen as restricting access to opportunities
- Essential skills assessments are a potential barrier to recruitment of individuals into care based Apprenticeships, in particular returnees to the labour market and individuals who may previously not engaged in education.
- 'Myths' around the requirement for individuals to be over the age of 18 to work in the sector to be addressed including a greater understanding of what roles and activities can be undertaken.

Contracting and pay terms are also creating significant issues within the sector. In the Health sector, inconsistencies in the rates of pay for Apprenticeships are creating challenges for health boards and negatively affecting both the ability to recruit and more generally the morale of staff. Furthermore, the reliance on agency and locum staff at high rates of pay is hindering the ability to recruit other staff to some roles, this is also impacting the finance available for the recruitment of Apprentices.

Terms and conditions within the Health sector can often be perceived as better than those within Social Care, this leads to social care support workers moving into the Health sector once qualified putting additional pressures on the Social Care sector.

Suitability of Skills Provision

Workplace training is seen as essential to the development of the sector, classroom based learning alone is not fit for purpose especially within domiciliary care. Furthermore, wider skills, values and core competencies are seen as more important to accredited qualifications in some cases, however, there remains a clear need for this in terms of professional regulation and regulatory compliance.

Further evidence indicates that the availability of training is highly dependent on geographic location. This is worsened by a lack of availability of good quality distance and e-learning opportunities and flexible learning provision i.e. part time learning offered at different times of the day, identified within some professional areas. Furthermore, regional arrangements regarding the placement of learners within the health care system restricts opportunities to utilise some providers.

The qualifications and courses offered to people who wish to develop their career in care have been subject of a review by Qualifications Wales. The findings have been welcomed by Social Care Wales and the wider sector as highlighting key challenges which need to be tackled, namely:

- the effectiveness of the present models of assessment in determining the knowledge, skills and understanding of learners;
- the currency of some qualifications, particularly those qualifications taken by learners aged 14-16;
- the extent to which qualifications prepared learners for progression to higher education;
- the coverage of certain key aspects of learning for different areas of work, for example in relation to dementia care, domiciliary care and play work in the context of childcare; and
- the extent to which qualifications prepared learners effectively for working in a bilingual nation.

Engagement with the cluster group identified further concerns within the suitability of provision including:

- The availability and quality of assessors in particular within the management and Welsh language areas.
- Some individuals are being 'pushed through' qualifications by providers which are inappropriate for their role as some activity is target driven due to skills funding incentives.
- The assessment process for numeracy and literacy is seen as a barrier to recruitment and retention of some apprentices, particularly for those who are returning to the market.

A new suite of qualifications is being developed for teaching from September 2019, these will be delivered by a restricted number of awarding bodies as a means of addressing the findings of the review, as well as improving the quality of how qualifications are delivered and assessed.

Opportunities and Challenges

Replacement jobs

In the future there will be a need to replace substantial numbers of workers leaving the sector, due mostly to retirement, since there is an older demographic according to Social Care Wales' analysis of the registered workforce, in particular, registered managers of adult care homes. Staff turnover is high is some parts of the sector, and employers report difficulties in recruitment, particularly for registered managers and the social care workforce.

Future roles: new technology

In future it is expected that more individuals using care and support services will be supported by a confident, knowledgeable and skilled social care workforce, working creatively with Electronic Assistive Technology to support their well-being, choice and independence. This will increase independence and empower more people to find creative solutions to meet their well-being. However it will also produce knowledge gaps and skill shortages, as organisations seek to move to a greater use of technology, as they are unlikely to have staff who can meet these future requirements or do not have the required aptitudes and attitudes. There is a requirement to develop a regional workforce plan and a strategy for the next 10 years to ensure that the sector can fully capitalise on these innovations.

Future roles: integration and complexity

The WG has indicated that integration of Social Care and Health is a priority. This will require a care workforce which has the skills to deliver a variety of health care related tasks and to be able to do so on their own, in people's homes. A new joint induction framework is being developed across the Health and Social Care sector which is due to be introduced in September 2017 to look at bridging the divide between the sectors.

Skills Gaps

Management skills

Managers and leaders in the sector are expected to support the delivery of the government's agenda for change, to increase the professionalism of their staff and improve the quality and diversity of services. This requires managers who are not only trained and qualified in Social Care but they also require leadership and business management skills. Social care managers for residential child care, domiciliary care (home care) and adult care homes are required to register with Social Care Wales of Wales, a level 5 qualification is a prerequisite for registration. Employers report challenges in recruiting qualified managers of the right calibre to deliver services. A development programme to prepare individuals for management is viewed as an appropriate model for improving management and ensure continuity of service for companies. It is important to note that the challenges of management can vary significantly between the Health and Social Care sectors due to organisational and cultural differences across the sectors.

General care and support workers skills

53% of people employed in services commissioned by local authorities have the required or recommended qualifications for their job, leaving 47% to become qualified. In general the majority of these workers currently require a minimum level 2 Health and Social Care vocational qualification.

From 2020 around 5,900 domiciliary (home care) workers in the region will be required to register with Social Care Wales in order to practice. One of the mandatory registration requirements is to hold a named qualification as listed on the Qualification Framework for the social care sector in Wales.

Welsh language skills

There is a need for Health and Social Care and early years services to be available through the medium of Welsh. The revised national strategy for Welsh language provision in health and care; More than Just Words[53] was published in spring 2016. The strategy states:

"People choose to receive Health and Social Care services in Welsh because that is their preference and right. For others, however, it is more than just a matter of choice – it is a matter of need. This is especially true for the elderly, people with dementia or a stroke, or young children who may only speak Welsh."

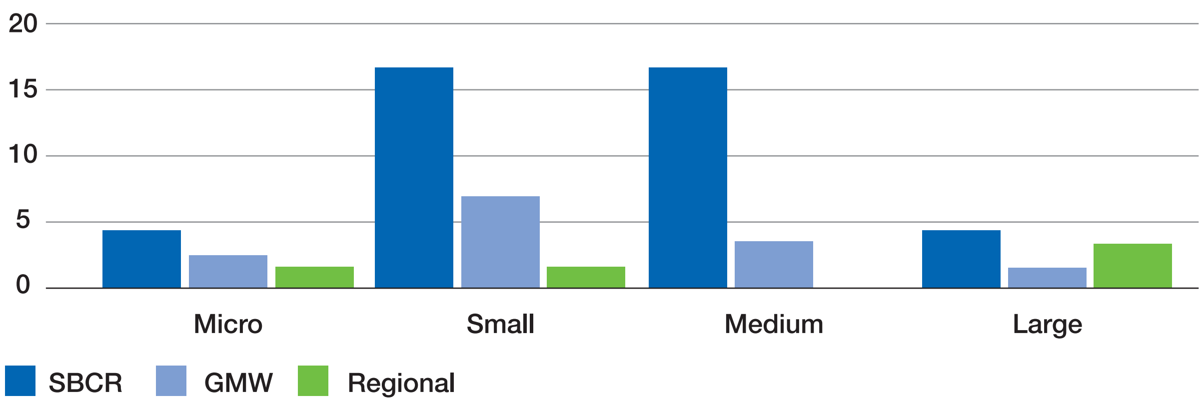
However, whereas 24% of the population of South West and Mid Wales can speak Welsh[54], employers report that only 14% of the Social Care workforce can[55]. With this in mind it will be important for employers and training providers to maintain and develop the Welsh language skills of the workforce.

Skills to support people with complex needs

There are growing demands on the sector to care for people with increasingly complex long term needs. This is true for people in residential settings and those living in their own homes. Dementia care is a particular example of this.

3.5.2 Primary Research Analysis

Response Profile for Health & Social Care



[53] *More than Just Words, Welsh Government, March 2016*

[54] *2011 Census*

[55] *Data from Local authority social services staff numbers, Welsh Government, combined with data from the Social Care Workforce Development Programme data collection of staff working for services commissioned by local authorities*

Challenges and Drivers of Change and Demand

At an SME level the most significant challenges facing Health and Social Care businesses in the region are centred around recruitment difficulties and funding. The two issues are closely aligned for many, with reductions in funding resulting in it becoming more problematic to train current staff and attract the desired new entrants to the sector.

A notable factor reported by many businesses is the requirement and pressure on businesses to provide a better and improved service with less funding and increasing fees;

'Increase in operational and staff costs, but small increases through Local Authority Commissioners. Less money to invest in staff training and creating career paths in Health and Social Care'

Concern was also expressed in relation to the requirement to register all home care workers by 2020, which will require all those registered to hold a minimum relevant qualification. There will be a full consultation on the qualification requirements for this group commencing July 2017. The concern from some employers is that this additional requirement will be a further barrier to the recruitment and retention of staff. The demand from some businesses and the industry needs to be heard i.e. it is skills that are required and not necessarily accredited qualifications. It must however be noted that the forthcoming registration of the workforce is part of the Regulation and Inspection of Social Care (Wales) 2016 Act and is seen to be a means of increasing the competence and improving the protection of those working with some of the most vulnerable people in society.

At a large business level similar challenges were reported with a greater emphasis on meeting WG targets under increased scrutiny and constricting budgets. Attention was drawn also on the pressure to improve services offered in rural areas and in turn attracting suitably skilled staff to deliver these services. In corroboration with this was the need to manage unplanned activity and maintaining service delivery whilst working towards a community based model of care within budget.

The main drivers of change and demand reported were around the increased use of technology and its effective use in meeting differing challenges especially in rural areas and the increased demands of an ageing population. Meeting targets and changes in legislation were also cited by many with the Apprenticeship levy being a concern amongst some.

Difficult Roles to Recruit

The majority of employers engaged with the process stated that they have faced difficulty in recruiting for some roles, these roles as defined by the employers are identified below;

Micro/Small	Medium	Large
Home care workers	Carers	Software roles
Nurses	Support Workers	Support worker
Carers	Community support worker	Nurses
Senior Carers	Manager	Managers
Advocacy		Doctors
Project Management		Pharmacists
		Occupational therapists
		Dentists
		GP's

The Work-Readiness of New Entrants to the Sector

Analysis of employer responses suggests that whilst new entrants to the sector are qualified to undertake the role they do not always necessarily possess the soft skills required. There is also some evidence to suggest that young school leavers are not fully aware of what is expected of them within a working environment.

A noted perceived barrier to allowing learners to gain experience in the care sector is that regulations prohibit anyone under 18 from either working or gaining experience in the sector. This is a myth as there is clear guidance set for work placements within care settings within National Minimum Standards and although these vary across different settings they broadly state that those under the age of 18 need to be fully supervised, supernumerary and not undertake support with personal care. Furthermore, there is concern around the appropriateness of provision;

'Schools and colleges are often not up to speed with developments that are changing the face of care e.g. assistive technology and this affects how care is taught and to whom and how young people are influenced - the hair or care option.'

A number of respondents reported that they only recruit individuals who have already worked in some care setting. This of course means that those who do not hold that valuable experience (such as a new entrant) are immediately excluded.

Numeracy, Literacy and ICT Skills

On the whole the majority of employers which engaged felt that the numeracy and literacy skills of their workforce were fit for purpose, although ICT skills were reported as an issue for some. What is clear from the evidence is that personality and the adaptability of the workforce is more of a consideration in this sector, with effective communication skills being of utmost importance.

Welsh Language

Analysis indicates that for the vast majority of employers engaged with the process the use of Welsh language is considered fairly or very important. The reason cited is to allow the services they provide to be offered to the client through their language of choice.

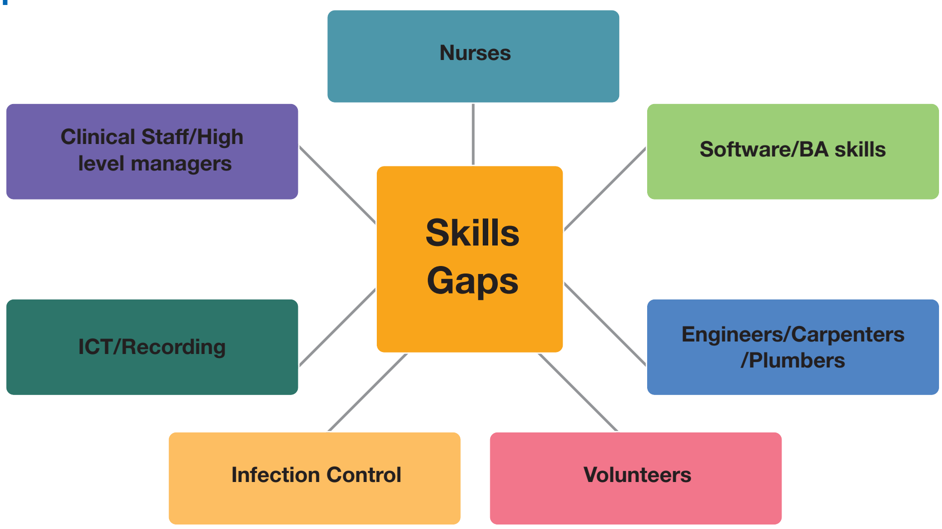
There are also instances where the use of Welsh is essential in providing care that is fit for purpose for the client; 'It is also becoming more apparent that some (individuals living with dementia) revert to their first language and that is often Welsh which they may not have spoken at home since their youth.'

Some businesses do face challenges, however; *'Our attitude towards Welsh Speaking is pro-active but we struggle to recruit Welsh Speakers. We are looking at an increased rate of pay to confirm that this is a recognised skill. Due to difficulties towards recruiting Welsh Speakers, we have had to adjust our Welsh Speaking Policy to reflect on the limitations that we currently face.'*

Barriers to Training

The evidence suggests that those businesses providing training internally do not report any barriers to training. Conversely, those surveyed that rely on the use of external providers experience a number of barriers, namely funding and time. In addition, the essential skills requirements for some training activity was a barrier to some employers. The lack of specialist provision was cited as an issue, with this training being centred on dementia and end of life care. Furthermore, rurality was a further barrier with one business reporting that they had to travel 2 hours to access suitable training.

Skills Gaps



Identified priorities

- **Availability of nurses across both the public and private sector is an immediate priority area, action required on training, recruitment and retention.**
- **Preparing the social care workforce for registration in advance of full registration by 2020 including a package of support is a priority.**
- **Improving the image of Health and Social Care including the understanding of it as a worthwhile career, identification of progression routes including the promotion of Apprenticeships and preparation of individuals for management through 'values based' recruitment.**
- **Welsh language is important for delivering care within the region, need identified for increasing the levels of conversational Welsh language skills.**

3.6 Leisure, Tourism and Retail

The Leisure, Tourism and Retail sector in Wales encompasses all tourism, hospitality, leisure and retail activities within the region and is of significant importance both in terms of the numbers employed as well as the ability to attract inward investment and expenditure.

By 2020 the hospitality and tourism workforce in Wales is projected to grow by 4,700 people. Taking into account replacement demand this means that 35,900 people will need to be recruited to the sector over the next seven years.[56]

The latest statistics released by WG state that regionally the Tourism, Leisure and Hospitality sectors employ 41,400 individuals, which is an increase of 29% since 2006.

The Retail sector is the largest private sector employer in the UK; employing approximately 10% of the total workforce. The largest sub-sector in terms of employment is sales and customer service accounting for approximately half of the total jobs.

The sector employs more women than men, this is due in part to the flexibility within the sector with regards to part-time employment and the majority of part-time employment opportunities are acquired by females.

By 2017, research indicates that 9,000 new retail jobs will have been created in Wales since 2007, whilst replacement demand will amount to 57,000 resulting in a total requirement of approximately 66,000 people.

A significant concern for the Retail sector is the ability to acquire the desired talent for the retail managers of the future. Previous schemes (or custom and practice) of promoting from within may not be viable in the future. Young people who previously might have worked their way up in retail are now going on to higher education – this is seen to be a key change for retail recruitment patterns.[57]

3.6.1 Employer Evidence

Recruitment and Retention

Recruitment to the sector is a challenge, an issue employers feel is attributed mainly to the perception of the sector and how it is portrayed to learners and parents. Learners are unaware of the opportunities available to them and the progression routes that become available through pursuing a career in the sector. Industry experts and employers expressed that the sector is the most diverse industry and this should be promoted through schools in particular.

Suitability of Skills Provision

Apprenticeship frameworks are not fit for purpose and need to be aligned to a multi skilled sector which is able to adapt to industry needs. Currently, the offer is not aspirational and gives the impression that the sector is one that is dull, working only during unsociable hours with no career progression or clear pathway.

The work-readiness of new entrants to the sector (especially school-leavers) is of significant concern. The soft skills of these individuals are severely lacking, as are time keeping skills, respect, a willingness to work and basic interaction. In a sector which is highly dependent on building a rapport quickly and providing a service this is a serious issue. This could be improved through the offer of work experience, and whilst industry offers it the restrictions put in place make it too difficult for schools to take advantage of the opportunity. Raising the profile of the sector and the opportunities for progression is vital for the success of the industry.

[56] *People 1st: State of the nation 2013: Wales Executive Summary*

[57] *https://www.careerswales.com/en/tools-and-resources/job-trends/retail/*

The Welsh language is incredibly important in this sector according to primary evidence gathered by the RLSP. Employers suggest that additional funding should be made available by WG to promote the use of the language in the sector and therefore train individuals appropriately.

It is also imperative that training offered is timely and appropriate, employers believe that the sector is always changing and therefore new skills will always be required. It is essential that providers are able to offer provision that meets these needs to ensure that the sector and individuals can fully capitalise on future opportunities.

The sector has a high level of compliance training that has to be undertaken in order to meet legislative requirements and there is insufficient information or opportunities from companies who offer this training when it is required and at an affordable cost. Examples include grounds maintenance and general maintenance.

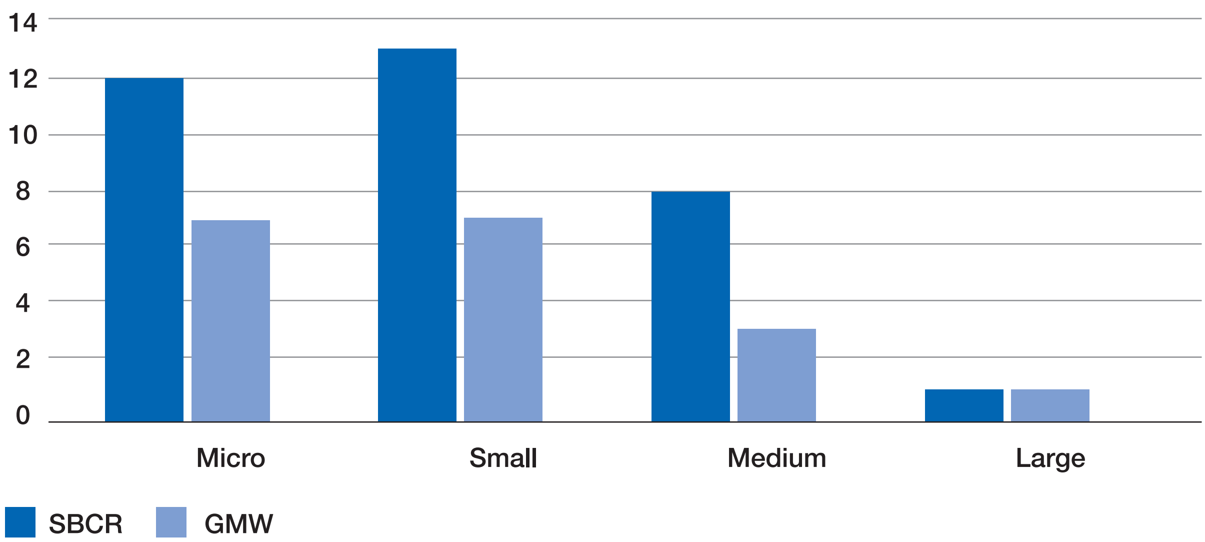
Opportunities and Challenges

The definition of the sector could be changed to strengthen its position as an aspirational, high value sector which provides much opportunity. Considering the sector as being foundational may discourage new entrants.

A school of excellence should be developed in the heart of the industry which is West Wales, this would strengthen the sectors presence as being aspirational. The Slovenian model for tourism and leisure is an example of good practice, and is a model that could be replicated in Wales. Slovenia has five hotel schools and three schools of excellence.

3.6.2 Primary Research Analysis

Response Profile for Leisure, Tourism & Retail



Challenges and Drivers of Change and Demand

The recruitment and retention of suitable staff is a challenge for many businesses operating within this sector. This is hindered by the perceived negative perception of the sector created by WG, educational institutions and careers advisers.

'The Welsh and UK Government do not recognise Tourism and Hospitality as a major aspect of the incoming economy. Additionally, the public perception that Tourism and Hospitality is just something that one does until one finds a "proper job". The industry should be recognised publicly as a rewarding, diverse, stimulating,

creative environment where many life skills are learnt to benefit any future career. It is an honour to work in the industry and have the opportunity to make a difference to visitors' enjoyment and their experience of our country. Teachers, lecturers and career advisers are ignorant of the opportunities that are available to people in the Tourism and Hospitality Industries. Instead of focusing on all to achieve jobs in other sectors, our industries should be positively highlighted and promoted to young people.'

The sector is highly dependent on seasonality and the willingness of people to travel, a challenging economic climate exacerbates this issue. This places additional pressure on businesses to offer a service at a fair cost whilst continuing to make a profit. In conjunction with this some businesses reported that marketing was a challenge for them with its effectiveness being the key to promoting their business and the services they provide.

'Marketing and raising brand awareness. Not many people know about the service I provide and spreading the word is really a big challenge.'

Declining visitor numbers and consumer demand was most commonly reported as a key driver of change and demand for businesses. This is highly affected by external factors such as a strong internet connection and fit for purpose transportation infrastructure. A business in Mid Wales reported that;

'Poor road connections and limited public transport. Mobile phone signals across region varies considerably impacting negatively on visitor's ability to find and engage will local providers. Complete lack of cohesive communications provision for modern consumer. Poor road connections and limited public transport.'

Other external factors having detrimental effects on these businesses are influences such as increasing costs such as VAT and business rates. This intensifies the pressure to offer a service that meets consumer demand whilst returning a reasonable profit.

Uncertainty surrounding Brexit is also a significant concern for many.

Difficult Roles to Recruit

The majority of the employers engaged with reported having experienced difficulty in recruiting for specific roles. Those roles are identified below;

Micro/Small	Medium	Large
Chefs	Management Roles	Front of House staff
Managers	Hospitality Roles	
Administrative staff	Chefs	
Watersport Instructors		
Catering, Housekeeping, Pool Side		
Cleaning staff/Housekeepers		
Food & Beverage		
Front of House staff		
Receptionists		
Maintenance		

The Work-readiness of New Entrants to the Sector

The majority of employers engaged with feel that new entrants to the sector are not work ready. This is exclusively prevalent amongst young school leavers and young entrants generally.

The evidence indicates that effective communication skills are essential given the customer focused nature of the sector. These crucial skills are lacking amongst new entrants with many unable to converse effectively with customers and unable to deal with confrontation. The social skills of individuals were also found to be a barrier.

In conjunction with this, many are unaware of what is expected from them in a working environment e.g. a lack of commitment, no willingness to learn etc.

'Younger employees have no concept of working within a professional environment and how to behave within this world. They struggle to communicate effectively, and do not know how to verbalise their thoughts and ideas in a coherent and productive way. They have valuable and interesting thoughts that should be capitalised on, but it can be difficult for them communicate these within a professional setting.'

'Can sometimes lack key employability skills such as communication and understanding of what is expected in roles such as the importance of following policies and procedures, dangers in social media and basic guest service skills.'

Numeracy, Literacy and ICT Skills

The majority of employers spoken with feel that the majority of their staff possess the required level of numeracy, literacy and ICT skills to undertake their role. Those reported as having the weakest skills in this area are young new entrants.

For those that reported experiencing challenges in this area, ICT skills were cited as the most lacking;
'The main area that is lacking is IT skills. Technology is moving at such a pace that most are not able to keep up or have a grasp of how social media / Cloud-computing / Wireless is progressing.'

Welsh Language

The Welsh language was cited as being either very or fairly important by the majority of employers. The primary reason for this is the belief that visitors enjoy hearing the language whether they themselves can speak it or not. It is equally important for staff to be able to converse with visitors and customers who are fluent in the language.

'Guests from across the border are keen to see and immerse themselves within the culture of the places that they are visiting.'

'We try to create a sense of place, visitors enjoy hearing the language spoken and locals are more comfortable when they can use Welsh.'

'I would love to increase my own ability to speak Welsh... and for customer-facing staff to be able to welcome guests in Welsh. It is not critical... and I believe would add a valuable aspect to our offer.'

Barriers to Training

Analysis of the evidence indicates that the most significant barrier to training is the lack of fit for purpose training available locally. This then exacerbates further barriers such as cost and time as this results in employees having to be sent away further afield to receive training.

'Training courses are not always suited to the needs of the tourism business. Costs and timeframes can also be a barrier as in a seasonal business there is a short window for sourcing external training and a number of legislative requirements which need to be fulfilled at cost.'

'Local college have to cancel due to lack of numbers, tourism industry often want short sharp training.'

Skills Gaps

Required Support to Grow and Develop

Businesses stated that they require support with the following areas;

Identified priorities

The below priorities have been by the members of the industry cluster group:

- **Develop a Hotel School of Excellence in Hospitality for the region. Coupled with this would be the agreement and promotion of an area wide standard of good visitor care for the Heritage Industry and attractions.**
- **Enhance CPD opportunities for existing staff and raise the profile of the Industry within schools.**
- **The FE sector and industry should work in partnership to develop relevant training for the industry that meets the needs of the learner, industry and provider. Through this process consideration should be given to examples of good practice that are currently being delivered in the region.**

3.7 Financial and Professional Services and ICT

Defining the Sector

The Financial and Professional Services sector encompasses a number of different areas and is primarily made up of service based industries. The sector ranges from legal and financial services through to professional consultancy and similar occupations. At a Wales level the sector is the largest in terms of its GVA of all the priority sectors (£12,080m). It is also a significant employer, with 31,400 individuals working in the sector across the region of South West and Mid Wales.

3.7.1 Employer Evidence

Recruitment and Retention

Recruitment and retention into the Financial and Professional Services sector is good on the whole. However, there is evidence to suggest that small firms are unaware of where to go to recruit Apprentices. The recruitment and retention of individuals into the legal sub-sector is very high, however it is a very competitive profession and therefore practical experience is invaluable. Attracting staff within the law and accountancy profession to work in the South West and Mid Wales region as larger firms in Cardiff target university students in their second year, even though training offered through smaller firms would give broader opportunities.

Suitability of Skills Provision

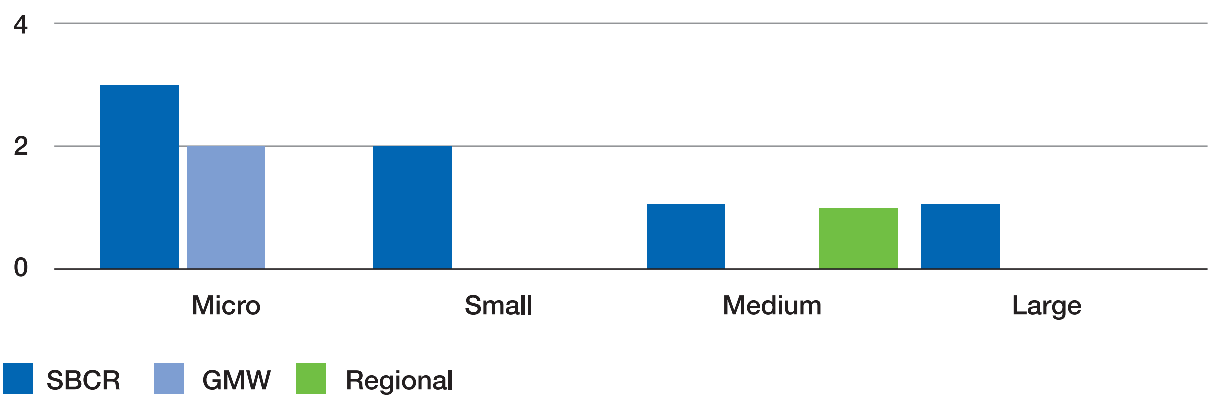
A primary source of discussion for employers is the need to build in an element of work experience or practical experience into every course. This would be of significant benefit to both the employer and the learner.

Specifically, the current Higher Education course for Law has remained unchanged for almost 20 years, therefore it is not fit for purpose nor does it fully prepare learners for the world of work following graduation. There is a demand for the course to cover more practical skills, such as; learning to write letters, researching skills and answering phone calls. These are skills that new entrants to the sector simply do not possess and require.

Furthermore, funding is an issue for the legal practice course (LPC) which needs to be completed before an individual becomes a fully qualified solicitor. This issue is exacerbated by the lack of an advanced learner loan in Wales which is currently available in England. Some companies prefer to take on candidates from the less academic routes.

3.7.2 Primary Research Analysis

Response Profile for Professional Services



Challenges and Drivers of Change and Demand

The recruitment of suitable staff and access to relevant training provision are reported as being challenges some businesses operating within the sector face.

The nature of the sector means that it is driven by client demands and the needs of customers, which brings with it unique challenges such as cash flow lead times. These issues and drivers are exacerbated by changes in legislation (especially in the legal sector) and highly dependent on changes and fluctuations in elements of the economy e.g. property market.

Difficult Roles to Recruit

The vast majority of those employers engaged with reported that they face difficulty in recruiting for specific roles. These roles are detailed below;

Micro/Small	Medium	Large
Chartered Surveyors	Secretaries	Part qualified financial technicians
	Qualified Solicitors	Procurement CIPS
		Leadership and Management
		Software Developers
		Professional Roles e.g. accountants, qualified HR, commercial estates managers

The Work-readiness of New Entrants to the Sector

Just over half of the employers engaged with indicated that most new entrants to their workforce are not work ready. There is a general feeling that entrants are not aware of what is expected from them in a working environment. Furthermore, there is evidence to suggest that some do not possess the relevant basic skills such as communication and ICT skills.

‘Most lack practical experience of the working environment. They need to be immersed for an appropriate period.’

‘There is a feeling that reward should be significantly higher than is the case. There is a lack of numeracy amongst many new entrants, a lack of ability to think outside of the box and a general lack of commercial awareness. When we have interviewed new either college or university graduates there is a lack of knowledge as to what the working world is like. This reflects our choice of seeking older employees and we will for expansion.’

‘Few have adequate practical skills and in a number of cases do not have the necessary ICT skills.’

‘More work needs to be done in education to prepare people for the workplace. Simple requirements such as following instructions, having to arrive on time, attendance etc. have to be taught.’

Welsh Language

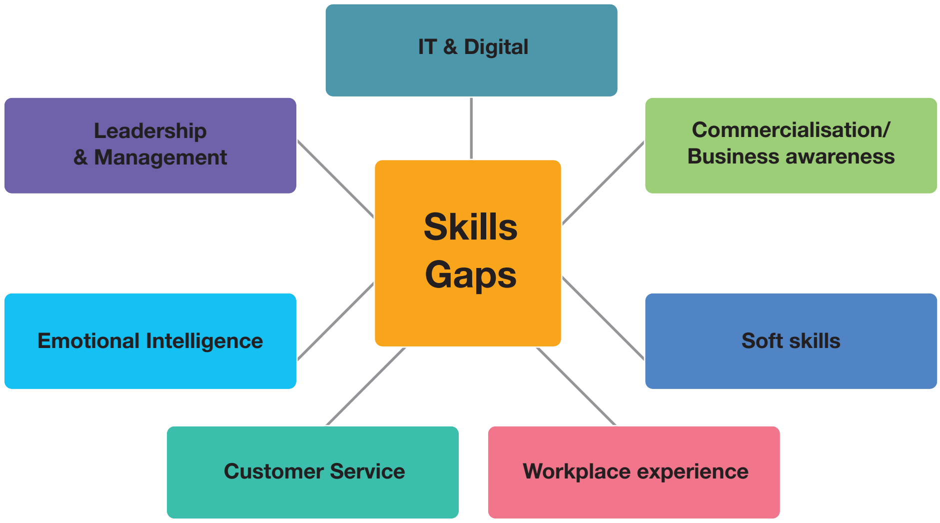
Similarly to other sectors there is a direct correlation between the location of businesses and how important they rate the Welsh language within the Financial and Professional Services sector. This is also something that is client driven and companies feel that it is positive to be able to offer their services bilingually.

Barriers to Training

The barriers to training experienced by companies within the sector include a lack of appropriate provision locally and the lack of funding available to adult part time learners. This is a significant barrier for individuals looking to up-skill or change their profession.

Furthermore, one respondent stated that accessing funding for specific training is problematic with the delivery method for this training adversely effecting productivity.

Skills Gaps



Support Required to Grow and Develop

Businesses stated that they require support with the following areas;

Identified priorities

- **Future proofing with businesses doing effective workforce planning supported by long term plans in education to support their ability to recruit new employees with the right skills and knowledge and flexible learning to help them develop their existing people.**
- **Dialogue needed with the training providers to ensure the content of the courses are meeting the industry demands including an element of work based learning so people are more work ready.**
- **Leadership and commercial awareness training to supplement the professional qualifications.**

3.8 Mid Wales Industry Cluster Group

Recruitment and Retention

Rurality is a severe issue for businesses operating within Mid Wales. This exacerbates difficulties in the recruitment and retention of desired staff with distance to travel to work becoming a barrier for some. Connectivity and the ICT infrastructure in the area poses further issues and is seen to be detrimental to the attraction of both skilled people and key employers to the area.

Many employers reported difficulties in recruiting staff for specific roles with the perceptions of key employment sectors being cited as a contributory factor to this. These difficulties in recruitment have resulted in some companies having to source labour from across the border as the desired candidates simply cannot be sourced locally.

Some employers reported having had negative experiences of WG schemes directly linked to Apprenticeships and others such as Jobs Growth Wales. This of course worsens the difficulties faced by both individuals looking for opportunities and businesses looking for employees. With the reported limitations in the curriculum offer across the area such schemes are invaluable in providing opportunities, it is essential therefore that they meet the needs of all concerned.

Suitability of Skills Provision

Significant concern was expressed about the availability and offer of courses in Mid Wales. This is resulting in learners having to travel significant distances (sometimes across the border) to acquire the skills that they desire and need. This is both an issue for learners that have not entered employment as of yet and for those individuals who are already in work requiring further training. The movement of these learners exacerbates the trend of ‘brain-drain’ from the area.

A specific example of this is the movement of learners from Mid Wales to Hereford and Ludlow colleges. For example, these colleges offer provision in Farriery and Forestry which are both subject areas currently not offered in Mid Wales.

Specific examples of gaps in provision cited include;

- Catering courses offered are out of date and therefore not fit for purpose
- There is no provision offered for aspiring Architects with learners having to study in Swansea, Cardiff or Birmingham.
- The nearest Forestry course offered is delivered in Bangor however Mid Wales has a substantial demand for these skills.

These limitations within the offer are resulting in businesses having to ‘take a chance’ on prospective employees that may not necessarily possess the exact desired skills for the role. It is becoming common-place that those with similar skill sets are being sought and the outstanding skills are then acquired through internal training at the employers’ expense. This is easier for larger companies to undertake but can be more problematic for SME’s, there is therefore a greater demand from SME’s that individuals are ‘work-ready’.

The work-readiness of new entrants has been reported as an issue for some employers. This can be linked to what employers feel is the ever- increasing non-practical nature of some vocational courses offered. The lack of practical experience gained result in much of the courses becoming less and less applicable to working life.

Furthermore, the essential skills elements of some courses offered have become a significant barrier to potential learners. This is true for both new entrants and those looking to return to learning.

Opportunities and Challenges

There is a significant demand from employers within the area to see improvements in the careers advice provided to learners at a young age to improve their perceptions of key employment sectors. This is also true of Apprenticeships as a learning route as many learners are unaware of the opportunities they could provide.

The level of engagement between employers and providers is limited presently. It is therefore felt that employer needs are not being adequately met both in terms of the suitability of provision and the limitations in the offer generally.

Priorities Identified

- **The immediate priority is to improve the offer locally in Mid Wales, however until this is achieved it is essential that cross border activity remains available to learners. Individuals are the most important not where they live or work and standards and funding should provide appropriate mechanisms for continued delivery until an appropriate alternative is offered.**
- **Need to innovate and do things differently, including being more agile and more responsive to innovation and change.**
- **A lack of quality and appropriate training locally is a concern, greater emphasis needs to be placed on employer and learner satisfaction and the needs of the local labour market.**
- **There is a difficulty in recruiting assessors in a number of areas which is impacting upon the availability of vocational delivery.**

Section 4

Aspirational Projects and Key Developments

4.1 Swansea Bay City Region

4.1.1 Swansea Bay City Deal

On Monday 20th March 2017 UK and WG signed the Swansea Bay City Deal which secured investment worth £1.3 billion over 15 years for eleven transformational projects. The total benefits for the region will equate to £1.8 billion and generate almost 10,000 new jobs[58].

Eleven projects form the agreed deal, which are;

Well-being and Life Science Village in Llanelli

A Life Science and Well-being village will be constructed and operational with a village containing a primary/community care facility, and institute of life science (ILS) and an education and skills development capability.

Egin: Creative and Digital Cluster for Wales (Phase 2)

The Egin creative and digital cluster will build upon the Yr Egin phase 1 which will create a creative industry hub within Carmarthen joined by S4C as a key anchor tenant and a number of SME tenants.

Swansea City and Waterfront Digital District

The Swansea City and Waterfront Digital District project aims to create a vibrant and sustainable city centre that facilitates the growth of higher value activities (particularly tech businesses) and acts as a key driver to the regional economy.

Pembroke Dock Marine

Pembroke Dock Marine brings together four key elements to concentrate, innovate, collaborate and generate a world class marine energy base in Wales making marine derived energy both cost effective and reliable.

Centre of Excellence for Next Generation Digital Services (CENGS)

The Centre for Excellence for Next Generation Digital Services (CENGS) will bridge the gap between research and innovation and the ability to launch, develop and grow commercial opportunities.

Delivering Homes as Power Stations

The programme will target both new building projects and the retrofit of existing housing to reduce energy costs and provide affordable warmth for householders.

Steel Science

A new Steel Science Centre will enable the steel sector to evolve into a leading edge zero carbon steelmaker with carbon positive products utilising locally generated waste products as a chemical and raw materials feedstock.

Life Science and Well-being Campuses

To support the development of the life science and well-being sector within the city region building upon the successful Institute of Life Science initiative. The project will create expanded infrastructure with wider capabilities allowing more and larger opportunities to be captured, ranging from major inward investment opportunities to HE/NHS commercialisation activities.

Swansea Bay City Region Digital Infrastructure

The proposed digital infrastructure will integrate the themes into a seamless innovation ecosystem, using the region's assets and diversity to support indigenous and inward investing opportunities.

[58] *http://www.swanseabaycityregion.com/en/cd.htm*

Active Factory of the Future

The factory of the future will be a fully digitally connected, open innovation, manufacturing ecosystem deploying a physical hub and spoke network in newly built and leased space distributed over the Swansea Bay City Region.

Skills and Talent Initiative

The Skills and Talent Intervention will be managed and led by the RLSP and will provide an integrated regional approach to delivering skills focusing on specific sector skills required in order to meet the demand of the Swansea Bay City Region City Deal. This will ensure appropriate and timely response to industry and emerging project demands, remaining relevant and effective while avoiding duplication or missed opportunities.

4.1.2 Swansea Bay Tidal Lagoon

The publication of the Hendry review on the 12th January 2017 into the future of tidal lagoons[59] has emphasised strong support for the development of the Swansea Bay Tidal Lagoon as a pathfinder project.

'After years of debating, the evidence is I believe clear that tidal lagoons can play a cost-effective part of the UK's energy mix. Large scale tidal lagoons, delivered with the advantages created by the pathfinder, are likely to be able to play a valuable and cost competitive role in the electricity system of the future.'[60]

Although currently there has been no further development in relation to the Swansea Bay Tidal Lagoon from the UK the review is a significant boost in confidence for the project.

The RLSP has worked extensively with Tidal Lagoon Power to identify and understand the skills challenges associated with the development of both a pathfinder lagoon in Swansea Bay but also the skills required to develop a tidal lagoon energy sector in the region. This research examined the impact of existing research in the region regarding Construction and manufacturing capabilities and extended the manufacturing research to identify the levels required to complete the component parts. An executive summary and the recommendations detailed within the report can be accessed here; **http://www.rlp.org.uk/wp-content/uploads/SBTL-Executive-Summary.pdf**

The RLSP will continue to work closely with Tidal Lagoon Power and relevant stakeholders to maximise the opportunities presented by the Swansea Bay Tidal Lagoon and the longer term development of the tidal lagoon industry.

4.1.3 A Regional Collaboration for Health (ARCH)

ARCH has been formed to support a joined up regional approach to deliver meaningful change and to improve the health, wealth and wellbeing of South West Wales. It is a collaboration between the NHS health boards of Hywel Dda and Abertawe Bro Morgannwg University Health Board (ABMU) and Swansea University and supports are range project activities around four key areas.

- Workforce, education and training,
- Health and Wellbeing,
- Service Transformation,
- Research, Enterprise and Innovation.

4.1.4 IMPACT – Innovative Materials, Processing and Numerical Technologies

The IMPACT building at Swansea University's Bay Campus will form part of the College of Engineering as a semi-autonomous research institute. Research will be conducted through strategic objectives determined by a specific steering board and advice from external industrial, governmental and academic stakeholders.

[59] *https://hendryreview.wordpress.com/*
[60] *https://hendryreview.files.wordpress.com/2016/08/summary-of-recommendations.pdf*

The programme will be delivered through a team of approximately 65 in-house academic researchers supported by an additional 155 researchers.

4.2 Growing Mid Wales

4.2.1 Beacon+

The award-winning BEACON Bio-refining Centre of Excellence, led by Aberystwyth University in partnership with Swansea and Bangor Universities, works in the field of conversion of biomass into bio based products. BEACON helps Welsh businesses develop new ways of converting feedstocks, such as rye grass, and oats, and waste streams into products which have applications in the pharmaceutical, chemicals, fuel and cosmetic industries.

4.2.2 Helix

Project HELIX is a pan Wales strategic initiative being delivered by the three partners that make up Food Innovation Wales.

With dedicated teams and facilities at:

- The Food Technology Centre, Grwp Llandrillo Menai (North Wales),
- Food Centre Wales, Ceredigion County Council (Mid Wales) and
- Food Industry Centre, Cardiff Metropolitan University (South Wales)

This initiative will develop and deliver academic and practical knowledge transfer activity focused on food innovation, food efficiency and food strategy to increase production and see waste reduction in the food chain.

Project HELIX will gather information on food production, trends and waste from across the globe and transfer the knowledge to food producers and manufacturers across Wales.

4.2.3 Aberystwyth Innovation & Enterprise Campus

Aberystwyth Innovation and Enterprise Campus (AIEC) will provide world leading facilities and the expertise to create market focused solutions for the agri-tech, food and drink and industrial biotechnology industries. The campus will contain several complimentary feature including an analytical science centre; bio refining centre; Future Food centre, seed biobank and processing facility and a hub area which will which will facilitate collaborative research projects between the University and private sector in the bio-economy.

The campus, which will cost approximately £35 million to construct, is being led by Aberystwyth University in partnership with the Biotechnology and Biological Sciences Research Council (BBSRC), and will be a key asset in the region's priority sectors of Food and Farming and Life Sciences.

The project will create in excess of a 100 jobs in the agri-tech industry and related fields once fully operational, creating demand in terms of higher level scientific skills.

4.2.4 VetHub1

Aberystwyth University are also leading on the development of the £3m project VetHub1 - a modern, fully-equipped, state-of-the-art facility to promote and protect animal and human health and to support animal health, veterinary, bio-technology and allied industries.

The hub will include a unique Category 3 laboratory in addition to a range of other new tests and associated product development for animal diseases that are now emerging within the livestock sector.
The operation will further strengthen critical mass within the Growing Mid Wales area in the priority sector areas of Animal Health and Veterinary Science.

Section 5

Learner and Provider Consultation Analysis

5.1 Learner Survey Analysis

5.1.1 Young Learner Perceptions

In order to test the perceptions and aspirations of young learners in the region the RLSP surveyed 290 learners over a period of three days at various skills fairs. Although a relatively small cohort of respondents by way of comparison, this information has provided a unique insight into the feelings of learners between the ages of 11 and 19.[61]

Of the 290 learners surveyed 207 (71%) reported that they were currently receiving careers advice or had done in the past, the vast majority of these learners were aged 14/15. More interestingly, 30% of the 207 receiving this advice rated it negatively. Notable comments include; “Not very helpful”, “Not inspiring”, “ Boring”, “Not regularly”, “Biased” and “Lean towards University”. A further 31% rated the advice as average, suggesting that 39% rated the advice as good or better.

Additionally, when asked what the word Apprenticeship means to them, only 53 learners (18%) had a good understanding of what an Apprenticeship is. Responses included “Learn on the job”, “Work while you learn”, “Paid work” and “When you’re taught by a professional”. Conversely, 95 learners (33%) answered “Don’t know”, with the remaining 49% attempting to answer the question but giving wrong or uninformed responses including; “Experience – work for free”, “Basic education”, “Going to work- dad tells me not to”, “Not paid very well”, “People who don’t go to University” and “The Apprentice – the show”.

5.2 Careers Check Data

Career Check provides Careers Advisers with ‘indicators’ that help them to identify clients who need support from Careers Wales. For example:

- support with career management skills,
- support to enter the labour market,
- support with factors affecting their decisions which could impact on their plans.

Career Check provides a snapshot of the way the client is currently thinking and is not a stand-alone tool. The data contained in this section relates to a sample collected in 2016 and is split by the economic region of South West Wales and Mid Wales.

5.2.1 South West (Carmarthenshire, Swansea, Pembrokeshire, Neath Port Talbot)[62]

Consideration of the data indicates that a career in the Health and Medical sector is the most popular occupational choice, followed by Leisure, Sports and Tourism and Engineering. A high number of respondents also expressed interest in the Computer, Software and IT and Emergency, Security and Armed Services sectors.

In contrast, those sectors that were least popular as occupational choices are the customer services sector, the administration and office work sector and the manufacturing, industry and factory work sector.

[61] At the time of this survey, Careers Wales was remitted to provide impartial careers advice and guidance only to pupils within in 11 or above who were likely to become NEET, along with a smaller proportion of pupils needing support with career decisions. It is not possible to distinguish from the responses provided whether respondents were referring to careers information, advice and guidance provided by Careers Wales or from others within the school careers education programme.

[62] 6,555 individuals surveyed

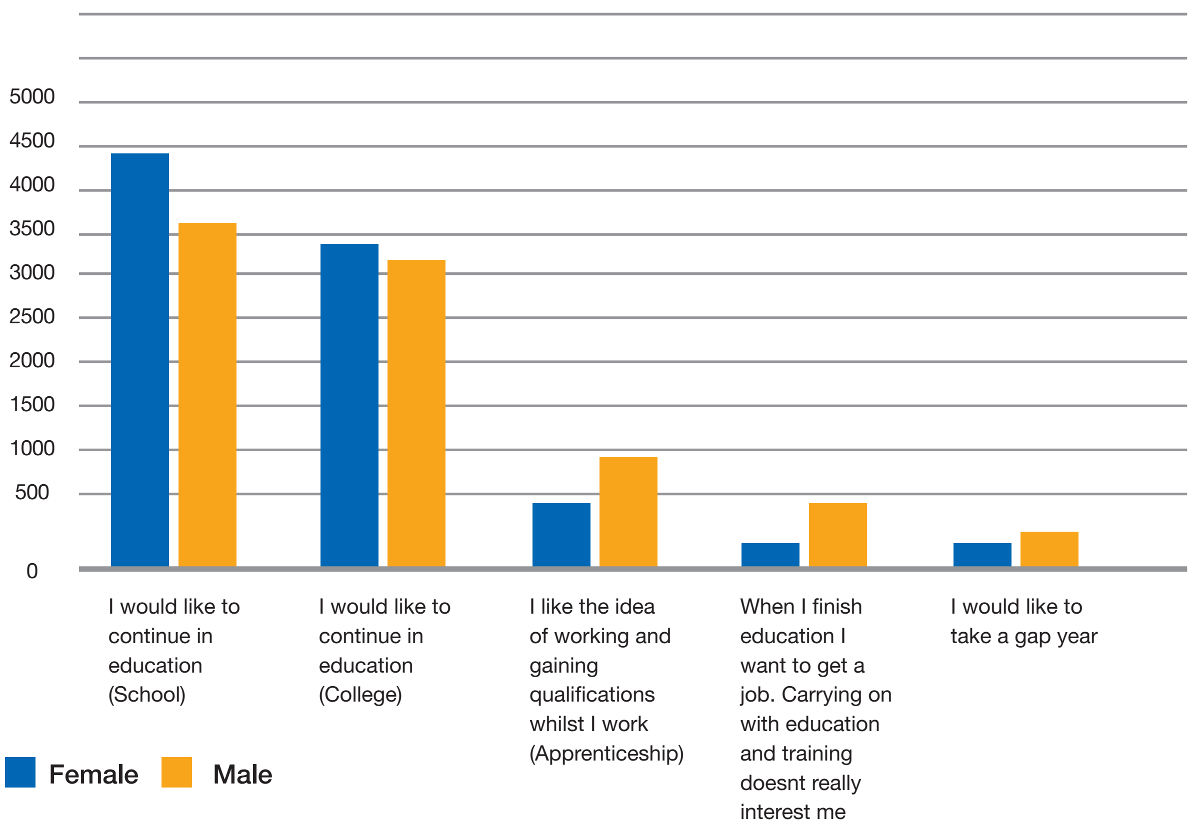
5.2.2 Mid Wales (Powys and Ceredigion)[63]

The most popular sectors replicate those identified in South West Wales with some variation in order. One notable difference is the popularity of animal care in Mid Wales, with the sector appearing significantly lower in the South West.

Similarly to South West Wales the least popular sector in terms of first occupational choice is customer services. This is followed by the transport, delivery and logistics sector and the retail and personal care sectors.

5.2.3 Expression of Next Step by Gender – All Wales

There is a gender imbalance visible across the preferred destination choices of year 10 students. This is most common across the spectrum of 'continuing education' either in school or in college with females being more likely to continue, males were more likely to want to undertake an Apprenticeship or seek employment immediately.



5.2 Provider Survey Analysis

5.2.1 Further Education Institutions

Learner Engagement

The FE sector feels that learners do not make direct links between courses and employment opportunities. This is a result of what providers feel is the poor and sometimes biased careers advice provided to learners in the earlier stages of their learning. There is evidence to suggest that this extends to parental pressure to pursue A-levels as opposed to vocational routes. Further effort should be made to improve the parity of vocational routes with non-vocational learning, (especially at level 3). Ensuring that teachers are fully aware of the opportunities that vocational learning can provide would go in part to improving learner perceptions and possibly improving learner engagement.

[63] *4,520 individuals surveyed*

careers advice provided to learners in the earlier stages of their learning. There is evidence to suggest that this extends to parental pressure to pursue A-levels as opposed to vocational routes. Further effort should be made to improve the parity of vocational routes with non-vocational learning, (especially at level 3). Ensuring that teachers are fully aware of the opportunities that vocational learning can provide would go in part to improving learner perceptions and possibly improving learner engagement.

For rural institutions distance to travel is a significant barrier to engagement and can unfortunately determine which courses and subject areas learners pursue.

At a regional level the courses which are seeing declines in engagement include;
Business Administration, Catering, Hair and Beauty.

Popular courses include;
Access to Nursing, Animal Care, Construction – level 1, Engineering, Hair and Beauty, Health and Social Care, IT Practitioners, Motor Vehicle, Public Services, Sports.

Learner Progression

Evidence indicates that the literacy and numeracy demands of certain courses can deter learners from progressing further. For instance, the requirement to have a GCSE rather than an alternative vocationally related numeracy and literacy qualification can prevent progression onto level 3. It is apparent that those who have not attained a GCSE in these areas struggle to address the higher skills needed for successfully completing level 3 qualifications and higher.

In some cases, there are challenges in matching a learner's skills and attributes to a suitable course. A lack of academic ability, attitude or external encouragement to continue a different from of education are all barriers to progression. This is directly aligned to what is perceived to be the lack of aspiration and confidence in predominantly vocational areas from learners and parents.

It is also reported that for one institution a 'drop-off' generally occurs when the learner can gain employment with the qualification at a lower level.

At a regional level subject areas where this is more prevalent include;

Animal Care, Business, Health and Social Care, IT, Public Services, Sport.

Delivery Models

Every institution within the region would like to see greater flexibility in the start dates of some of the courses that they deliver. A modular approach would be beneficial; creating a 'roll-on/off' approach to learning. In conjunction with this many would like to see shorter and sharper delivery models which are not governed by the strict assessment windows dictated by awarding bodies. A certain degree of flexibility is provided within work-based learning but this is not extended to traditional FE provision and it should be.

Online delivery is something that institutions would like to take further advantage of, however there are limitations and until this format is improved it will continue to account for a small amount of over-all delivery. This approach could significantly increase engagement for all institutions but especially those in rural locations which may face additional barriers to engagement. Furthermore, there is demand from institutions for a more blended approach to learning, coupled with the sharing of resources between institutions.

The duration and delivery patterns of provision is also an area of concern. At present, these factors create barriers for learners attempting to find employment opportunities and that much needed experience of the working world. For instance;

'Reducing the duration of vocational programmes to align with a Higher Education academic year whereby learners would experience a fuller timetable from September to May so that seasonal employment opportunities could be exploited.'

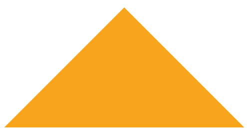
Suitability of Provision Available for Delivery

Qualifications are developing rapidly and are being carefully scrutinised as Qualifications Wales undertakes their regulatory function. As previously mentioned there is a desire from providers to improve the parity of vocational qualifications with traditional A level study. An area of concern is the pressure placed on institutions by external assessment procedures to make vocational study more academic in nature. This is to the detriment of some learners and once again a barrier to firstly engagement and then further progression.

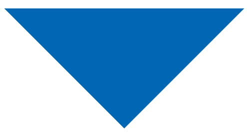
Whilst there is some evidence to support the positive changes in qualification design to account for technological advancements and the digital footprint further improvements are required with regards to 14-19 pathways and the suitability of KS4 curriculum to meet skills priorities. This is in direct reference to the desire to lessen the emphasis on academic routes and focus more on preparation for work. This substantiates the requirements of employers who state that soft skills is an area of concern for new entrants to their sectors. As a result, employers should have a greater input into the development of curricula.

Specific pathways which need updating to meet current needs are within the ICT and Computing, Business and Tourism sectors.

Curriculum Offer



Hospitality & Catering, Welsh medium provision in construction & care, FA's in the Creative Industries, Tourism, Agriculture, Hospitality & Managment & Health & Care sectors, STEM aligned courses, Marine Tourism, Engineering & Food Technology.



A - Level Provision

Recruitment

Every institution reported having difficulty in recruiting teaching/academic staff with the desired skillset. With the ever increasing focus on learners' numeracy and literacy skills it has become problematic to recruit individuals with the skillset to deliver these elements as well as possessing a high standard of knowledge in their field, subject area or trade.

Subject areas where these issues are more prevalent include;
Engineering, Construction Trades, Creative Industries, Motor Vehicle, Food and Farming.

For some institutions there is also a demand for more bilingual staff that are able to deliver more traditional subject areas such as Maths and Science.

These recruitment issues are exacerbated by the low salaries offered to entry point lecturers who would have higher incomes if they were to work within the private sector of their field. This is worsened by a lack of career progression and the lack of management training within some institutions.

Employer Engagement & Internal Processes

Every institution undertakes some form of employer engagement, although the format of this engagement varies. The majority of institutions state that whilst this is in an important aspect of their every-day work they would like to increase its prevalence in relation to curriculum development.

Some institutions have dedicated business development teams which are then supported by individual curriculum areas who undertake further engagement in an attempt to identify industry needs.

'Employer forums are a feature of vocational learning areas and while this is common practice it is a developing agenda with work needed to engage with emerging growth areas particularly where SMEs are the norm – in particular for the college are the energy and engineering sectors. This year, as part of annual planning for 2017/18 all faculties have liaised with companies from the relevant business communities in order to ensure that the offer meets their needs.'

'We engage with employers at all levels of the organisation. We have an Assistant Principal of Skills who has developed an Employer Engagement Strategy. Curriculum heads have close links with employers in their SSAs, SSC engagement, we have developed a CRM system to capture the information and use LMI and RLSP data.

Employer engagement was reported as a priority unanimously with institutions recognising where improvements need to be made.

'We engage with employers through Apprenticeships, commercial training and curriculum development. There are a number of employers on our board. There are a number of key partnerships that benefit our learner experience. We would like to have more engagement with employers in relation to curriculum development.'

The effective use of labour market information is integral in the planning processes of every institution. This is supported by extensive stakeholder engagement and driven by priorities detailed by WG and the RLSP in terms of key sectors of demand.

5.2.2 Higher Education Institutions

Learner Engagement

The costs associated to studying a higher education course are a perceived barrier to engagement. This relates to the *'growing perception that degree qualifications create a substantial amount of debt that provides little certainty of obtaining a graduate level income job.'*

Furthermore, a further barrier reported is the high prevalence of courses being offered on a full time basis. This unfortunately creates challenges for those prospective learners that have additional responsibilities such as childcare and work. A provider stated that;

'This is deeply rigid and inflexible – and makes little sense economically. We need to open learning to all who are able to participate if that means distance learning, or learning flexibly on a part time basis, or in an accelerated way then providers should accommodate this.'

These issues could be contributory factors in the 4% decline in UCAS applications for the coming academic year, this is coupled with the high proportion of graduates with student debt who are not anticipated to pay back their student loans.

Delivery Models

Unanimously, institutions believe that courses should be more responsive to student needs. The duration of courses and nature of delivery should be more flexible with an increase of part time courses, accelerated programmes and distance and blended learning all being cited as the main factors in flexible delivery.

There is demand for an increase in creative systems to enable students to drop in and drop out of programmes without penalties. The American 'build a degree unit by unit approach' was cited as an example of good practice which provides a great deal of flexibility for learners.

In addition, an increased recognition of prior learning (including experiential learning) and greater freedom in credit transfer between institutions would allow learners to attend courses in several venues are reported as changes that could remove many of the barriers to learners pursuing a HE course.

'We see potential for growth in short courses/bite sized/weekend/short and concentrated courses – in short very flexible learning in all ways - duration, time, online, residential/multiplatform etc. with movement between different modes of delivery during a single programme becoming more common.'

Suitability of Provision for Delivery

On the whole, institutions feel that their provision for delivery is fit for purpose. The greater level of flexibility that comes with being an awarding body is cited as allowing the offer to be designed and amended to meet changing demands.

The effectiveness of the provision offered is measured using a range of methods;

'We evaluate our effectiveness through various means e.g. performance in the National Student Survey, our performance against benchmark in the Destination of Leavers Survey, and comparisons against peer institutions in the levels of graduate start-ups.'

'….underpinned by effective quality assurance systems developed over many years and refined in light of the QAA frameworks and guidance.'

One institution stated that they whilst their offer is supported by their employer partners and unions, they would like to develop a wider range of modules with a credit value of less than sixty.

Curriculum Offer

Institutions indicate that their offer is driven by local labour market intelligence, employer feedback, regional skills priorities and local, regional and national needs. As awarding bodies delivery is 'flexed' to meet these changing needs resulting in a dynamic and fit for purpose offer.

One institution stated that they are taking active steps to develop their offer in respect of Higher Level Degree Apprenticeships, however there is demand for WG to provide more detailed intentions on how it intends to fund these.


PDSR / RLSP
RLSPSWMW
56 likes
Cynllunio Strategol Rhanbarthol ar Gyfer Sgiliau Lleol
Regional Strategic Planning for Local Skills

Section 6

Recommendations

The table below outlines the conclusions and recommendations which have been developed across all of the industry sectors and agreed upon by the RLSP board. Sector specific priorities have been identified for each individual sector and are detailed within their respective profiles. A number of potential key stakeholders have also been identified to aid in the implementation of the recommendations and next steps. Both the recommendations and next steps have been developed to encompass both the Swansea Bay City Region and the Growing Mid Wales geographies as the challenges identified affect both areas.

Conclusion	Recommendation	Next Steps	Key Stakeholders	Reference
Strategic Development				
1. The industry cluster group structure provides valuable employer feedback and allows effective engagement between the RLSP and key employers	**The RLSP will work with the established cluster groups, the group chairs and providers to develop activity around the priority areas identified by each individual sector.**	• Identify a 1 year timetable for next steps of the cluster group process including meetings and consultations. • Develop individual identified priorities with cluster groups and providers, including development of new provision where needs are identified. • Monitor progress against cluster group priorities and develop agreed targets.	Industry Representatives, FE, HE and WBL Providers	Section 3 – Sector Profiles
2. A number of large infrastructure projects and key developments aligned to the economic areas of SBCR and GMW have been outlined which will have significant skills implications for the region.	**The RLSP to lead on the skills agenda in both the SBCR and GMW region.**	• Continue and strengthen engagement with Swansea Bay City Deal region and Growing Mid Wales partnership. • Engage with project leads to clarify skills requirements and to identify opportunities for new provision development. • Ensure the development of pathways into higher level skills to support the aspirations of learners.	Industry Representatives Swansea Bay City Region, Growing Mid Wales Partnership, Individual Projects, FE, HE and WBL Providers	Section 4 – Aspirational Projects and Key Developments

Conclusion	Recommendation	Next Steps	Key Stakeholders	Reference
Strategic Development				
3. A number of large scale national infrastructure projects have been identified which will inevitably have skills implications for the region.	**The RLSP to work with large scale national infrastructure projects to understand the impact on the regional workforce, including any labour 'pull' effects.**	• Identify and engage with project leads for large scale national infrastructure projects alongside other RSPs in Wales, using the research undertaken regarding the Swansea Bay Tidal Lagoon as a model of good practice. • Improve the use of social clauses within large scale infrastructure projects to support learners and individuals into employment.	Industry Representatives, Major Infrastructure Projects, FE, HE and WBL Providers, WG, RSPs	Section 3 – Sector Profiles, Section 4 – Aspirational Projects and Key Developments
Employability				
4. Employer feedback indicates that basic skills is a concern. In many instances a lack of these skills is more prevalent in new entrants and young school leavers.	**The RLSP to seek to increase levels of employer satisfaction in regards to basic skills.**	• Engage with schools, local authorities and providers to promote the need for basic skills and to highlight the concerns of industry. • Develop with industry a common understanding of basic skills and a baseline on which to monitor satisfaction with basic skills. • Work with employability providers and WG via the employability group to support awareness amongst young people of basic skills requirements including literacy, numeracy, communication and digital skills.	Schools, FE, HE and WBL Providers, Industry Representatives, WG, Employability Projects, Careers Wales, DWP, Local Authorities	Section 3 – Sector Profiles

Conclusion	Recommendation	Next Steps	Key Stakeholders	Reference
Employability				
5. Employer feedback indicates that the employability of individuals at all levels is a concern.	**The RLSP to work with partners across the education and skills spectrum to enhance the employability of individuals, including aligning activity to the all Wales employability programme.**	• Engage with employers to develop a greater understanding of the employability requirements of industry. • Ensure effective delivery of the all Wales employability programme regionally through engagement with WG and relevant stakeholders. • Identify and monitor levels of employer satisfaction with employability to ensure that employer satisfaction is improved. • Promote the employability of older workers who wish to remain or become economically active through targeted support. • Support stakeholders to reduce the levels of economic inactivity amongst disadvantaged groups including those with disabilities or long term health conditions.	WG, Employability Projects, Careers Wales, DWP, Local Authorities, Industry Representatives.	Section 3 – Sector Profiles, Section 5 – Learner and Provider Consultation Analysis
6. Employer feedback has indicated that digital skills are a priority, with many facing difficulty in recruiting individuals with the desired skills in this area (this is especially prevalent in the Financial & Professional Services sector). There is a need therefore to enhance the prevalence of digital skills amongst both learners and the workforce, with particular focus on higher level IT and software skills to drive the development of the digital economy.	**The RLSP to promote the development of digital skills across the region across all levels of education.**	• Coordinated activity needs to be developed to upskill individuals digitally and to improve the awareness of the digital economy. • Increase the number of learners engaged with ICT across all levels to promote the development of the digital economy. • Build upon existing engagement with schools to nurture the next generation of digital learners.	FE and HE Providers, Industry Representatives, WG, Employability Projects, Growing Mid Wales, Swansea Bay City Region	Section 2 – Policy Context, Section 3 – Sector Profiles, Section 4 – Aspirational Projects and Key Developments

Conclusion	Recommendation	Next Steps	Key Stakeholders	Reference
Learning and Career Choices				
7. Evidence gathered from employers & learners indicates that Apprenticeships are poorly understood as learning opportunities.	**Increase the understanding of opportunities offered by Apprenticeships across the region and develop targeted promotion with employers, learners at all levels, as well as parents and guardians to ensure that opportunities are understood.**	• Develop a regional Apprenticeship awareness strategy to promote Apprenticeships alongside further and higher education routes. • Work with schools to engage with parents and guardians to improve the perceptions of Apprenticeships. • Develop regional case studies to promote the benefits of Apprenticeships and the regional opportunities.	Schools, FE, HE and WBL Providers, WG, Careers Wales, DWP, Industry Representatives.	Section 3 – Sector Profiles, Section 4 – Aspirational Projects and Key Developments, Section 5 – Learner and Provider Consultation Analysis
8. The quality and quantity of the current offer of careers advice provided to learners was highlighted as an issue by employers. This is supported by the learner evidence. Employers feel that this is a contributory factor to the poor perception currently held by society of some sectors.	**Improve the availability of careers advice to younger students to help inform subject choices and to raise awareness of potential learning and careers opportunities.**	• Identify areas where awareness of careers and subject choices can be made earlier to support subject choice at GCSE. • Increase the number of opportunities for young people to engage with industry.	Schools, FE, HE and WBL Providers, WG, Careers Wales, DWP	Section 5 – Learner and Provider Consultation Analysis

Conclusion	Recommendation	Next Steps	Key Stakeholders	Reference
Learning and Career Choices				
9. Many sectors suffer from poor perceptions of employment types, job roles and pay. Employers feel that this is to the detriment of attracting and retaining new talent to the sectors.	**Raise perceptions of sectors where there are identified recruitment issues caused by poor perceptions of employment in the industry.**	• Further identify via the cluster groups industries which have poor perceptions relating to employment. • Develop work experience opportunities within those sectors to promote employment. Identify opportunities to engage with schools and providers to further the understanding of poorly perceived sectors.	Industry Representatives, Schools, FE, HE and WBL Providers, Careers Wales, DWP	Section 3 – Sector Profiles
Opportunities and Provision				
10. Employers highlighted within the cluster groups that they would like Apprenticeships to better reflect their needs.	**Improve employer engagement in the development of Apprenticeship frameworks, including for higher and degree level programmes through greater direct employer input and flexibility.**	• Engage with Qualifications Wales and awarding bodies to identify the challenges in framework development. • Identify which frameworks are of greatest concern to employers to address. • Assess models of best practice for employer engagement in Apprenticeships across the UK. • Review time allocation for basic skills within vocational qualifications to ensure that learners spend more time developing subject related skills.	FE, HE and WBL Providers, WG, Industry Representatives, Qualifications Wales, Awarding Bodies	Section 3 – Sector Profiles

Conclusion	Recommendation	Next Steps	Key Stakeholders	Reference
Opportunities and Provision				
11. Both providers and employers highlighted the difficulty of developing new provision in some geographic areas.	**Additional assistance needs to be provided to facilitate new provision in geographic areas where currently the required resources are not available, this includes the required equipment and teaching resources to develop the desired activity.**	• Understand where new provision types are required. • Collaboratively develop with industry, providers and government appropriate delivery and funding mechanisms. • Develop pathways into higher level skills to allow for learner progression and development.	FE, HE and WBL Providers, WG, Industry Representatives	Section 5 – Learner and Provider Consultation Analysis
12. Some employers expressed concern that learners and in turn local businesses would be negatively impacted if individuals were not able to study some activity in England due to funding or differences in qualifications.	**A 'learner first' approach needs to be adopted in relation to students who choose to study outside of Wales with a particular focus on those who live near the border, or where provision is not available more locally.**	• Identify the number of learners undertaking activity in England to identify areas where there are provision gaps in Wales. • Develop a 'learner first' principle to cross border funding to ensure that learners can continue to access suitable provision. • Ensure that companies are able to access the most appropriate learning for their requirements. • Minimise the impact of the Apprenticeship levy on businesses with cross border activity.	FE, HE and WBL Providers, Growing Mid Wales Partnership, WG, UK Government, Industry Representatives.	Section 3 – Sector Profiles

Conclusion	Recommendation	Next Steps	Key Stakeholders	Reference
Opportunities and Provision				
13. Providers and employers expressed concerns that the data (relating to the curriculum offer) provided for analysis was not appropriate to conduct a comprehensive analysis. Particular reference was made to the aggregated nature of the data and the lack of information provided for HE, school level provision, A-level provision and adult learning.	**Data for analysis needs to be expanded to improve confidence for all parties involved and the understanding of provision for employers.**	• Data needs to be provided at an individual learner level per enrolment year to simplify the analysis. • Engagement with industry representatives is required to improve understanding of outcomes data for use in the employment and skills plan process. • Where possible data should be provided earlier to allow for opportunities for consultation with providers and industry.	FE, HE and WBL Providers, WG, Industry Representatives	Section 5 – Learner and Provider Consultation Analysis
14. Evidence indicates that there are gender disparities with regard to employment in sectors aligned to STEM. Furthermore, the same evidence shows that levels of employment within those sectors generally is decreasing.	**Increase promotion of STEM related subjects and careers to learners across all age groups, aligning to the WG priority of increasing levels of engagement in STEM related employment and learning.**	• Work with industry to develop STEM engagement resources. • Engage with schools and Careers Wales to enhance current STEM engagement activities. • Monitor the take up of STEM related subjects by gender and the employment proportions of key sectors.	Industry Representatives, Schools, FE, HE and WBL Providers, Careers Wales, DWP	Section 2 – Policy Context

Regional Learning and Skills Partnership
Partneriaeth Dysgu a Sgiliau Rhanbarthol
South West & Mid Wales
De-Orllewin a Canolbarth Cymru