



Regional Learning and Skills Partnership
Partneriaeth Dysgu a Sgiliau Rhanbarthol

De-Orllewin Cymru
South West Wales



Ariennir yn Rhannol gan
Lywodraeth Cymru
Part Funded by
Welsh Government

South West Wales **Employment and Skills Plan** **2022-2025**

The Regional Learning and Skills Partnership (RLSP) brings together industry partners from all sectors along with training/ education providers to develop a strategic partnership to enhance and promote skills and training in the region, specifically to meet the demand of employers both now and in the future. The knowledge, expertise and commitment of all the Board members, industry cluster groups, the training provider group and the wider business community, who support the RLSP. Ensure that we can develop those critical skills in line with demand; emerging technologies and new industries on the horizon.

This three year Employment and Skills plan has been developed in conjunction with employers, training providers and school leaders to inform Welsh Government on the future skills needs of the region with an aim to influence the Welsh Government's planning and funding of post 16 education through full time courses and apprenticeships. The plan contains key actions on training needs, including the emerging technologies to meet the net zero agenda.

Change is happening rapidly and since launching the last Employment and Skills Plan in 2019 there have been major changes across the World. The post covid landscape for skills has changed the way in which individuals now receive training; there has been a clear shift in the training requirements specifically around digital technology and there has been an increased demand for apprenticeships and work experience opportunities as we emerge from a world of hybrid working. Recruitment remains a major challenge for many sectors with many facing economic difficulty as jobs remain unfilled. This is compounded by the current cost of living crisis and the challenge of delivering on the climate change agenda, all of which impact on the productivity of businesses. However, skills remain a priority for business and this Plan details the priority areas that need to be addressed to ensure that we develop the workforce for the future. There are many opportunities for the region ahead through the City Deal and other large scale projects that will bring investment into the region together with the high paid jobs that the area needs.

I would like to thank the RLSP Board members; the Industry Cluster groups and the training providers for their continued support and invaluable contribution to the work of the RLSP. I would encourage all businesses to become involved with the work of the Board to ensure that we can deliver not only the actions contained within this Plan but that we raise awareness of the future skills that each individual business and the region requires to ensure that businesses in the region have the ability to compete for the opportunities that will be generated through new technology.



Edward Morgan

Chair of Regional Learning and Skills Partnership

Contents

Page 2

Methodology

Page 3

Industry and Regional Demographics

Pages 4-5

Labour Market and Industry

Skills Overview

Labour Overview

Pages 6-7

Workforce Barriers

All Sectors

Pages 8-9

Barriers and Opportunities

By Sector

Page 12

Future Skill Requirements

Page 11

Future Planning

Page 12

RLSP Survey Findings

All Sectors

Page 13-23

Sector Analysis and Plans

Page 23

Summary of Actions

Page 24-26

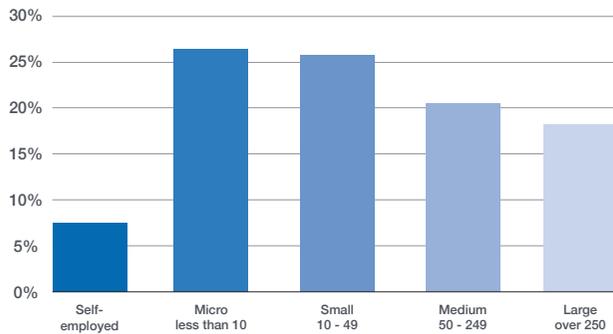
Action Plan

Methodology

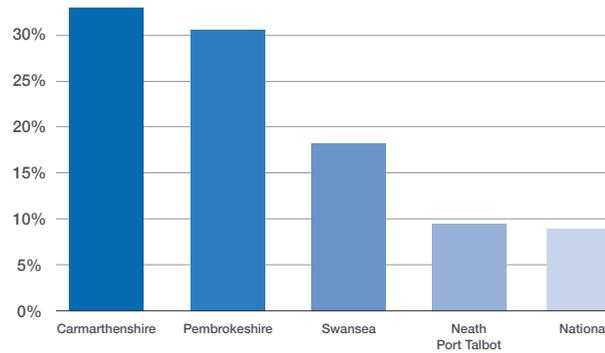
Over the past 3 years the South West Wales RLSP team have been gathering evidence from a number of sources to ensure the information available on skills challenges is robust and representative.

Using primary evidence from **491 Responses in the RLSP Employability and Skills survey** that ran from May to August 2022 using email to web data collection methods, targeting local employers, coupled with three annual cluster group meetings which span all industry sectors in the region, we have gathered a robust data set based on what skill challenges that are most needed for the region. Utilising secondary data and statistical information we are able to quantify the evidence gathered ensuring that the information contained within the plan is robust, representative and aligned to key priorities, best practice and policy.

Survey Results by Industry Size



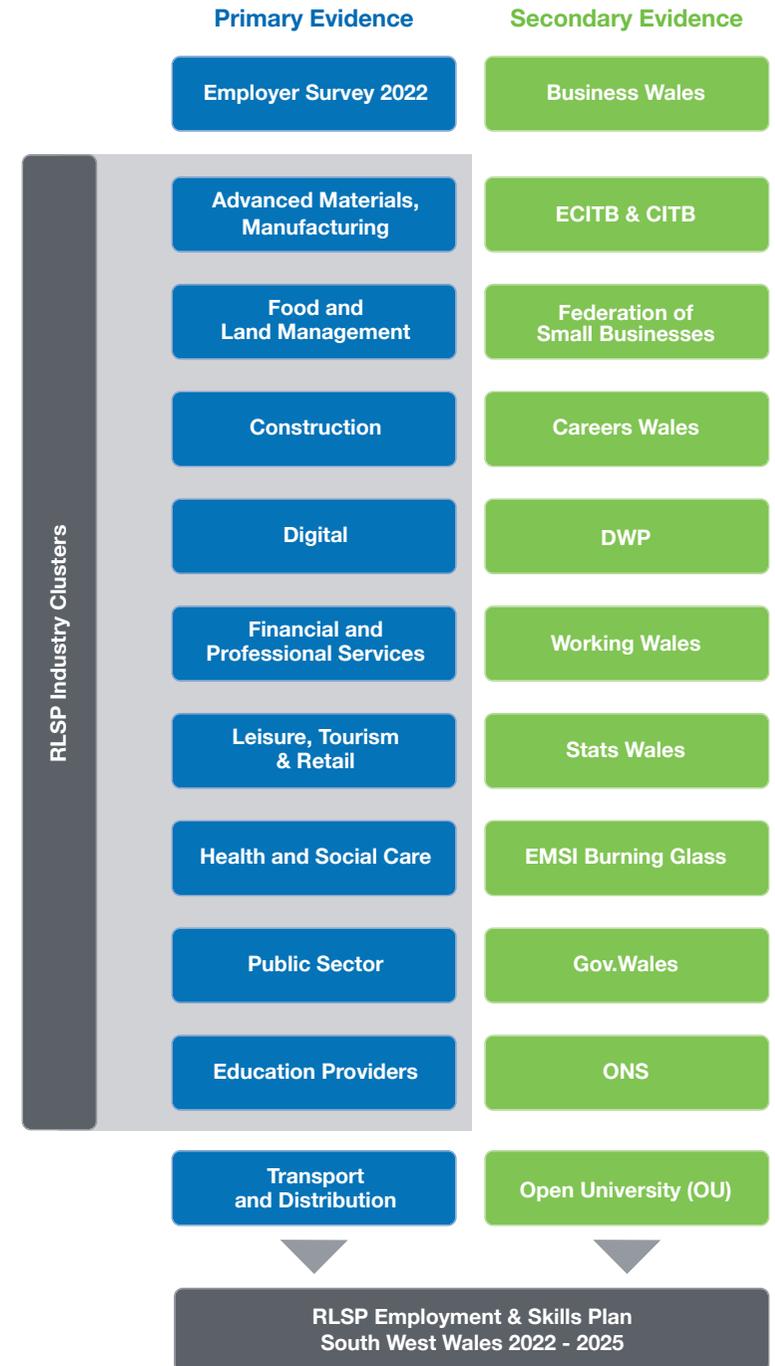
Survey Results by Industry Area



The Vision of Welsh Government

The skills landscape is shaped by what current vision Welsh Government have, the following is a brief summary of current policy documents that the plan is aligned with:

- Stronger Fairer Greener Wales Future Generations, Employability and Skills 2022
- Net Zero – Carbon Budget 2021-2025
- The New National Curriculum
- Cymraeg 2050
- Digital 2030
- Aligning the Apprenticeship Model with the needs of the economy 2017
- South West Wales Regional Economic Delivery Plan
- A Manufacturing Future for Wales
- Delivering Economic Transformation for a better future for work





Industry

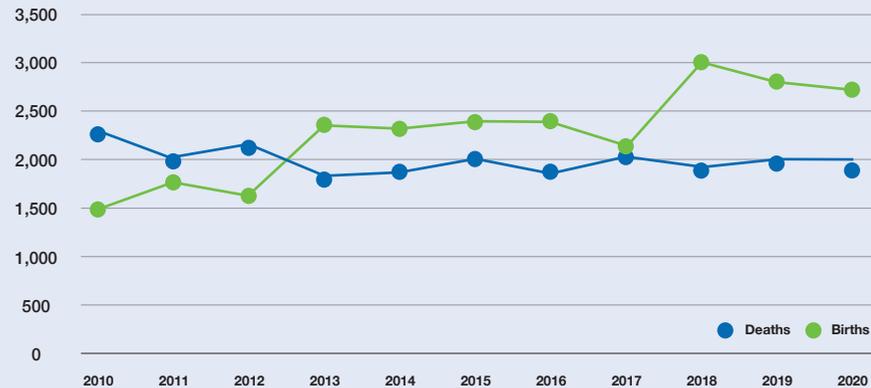
94.3% of all enterprises being micro businesses (0-9 employees)

Largest employment sectors in the region

- Human Health and Social Work
- Retail
- Manufacturing

<https://statswales.gov.wales/>

Industry Births & Deaths in the Region



Employment 16-64 year olds

- **Employed**
Decrease of 1,400 since 2019
- **Unemployment**
Increase of 1,100 since 2019
- **Inactive (excluding students)**
Decrease of 300 since 2019

Employed



Unemployed



Inactive excl Students



<https://statswales.gov.wales/>



Demographics

Population of 707,599 up 1.6% since 2016

Average wage £25,000 - £5,000 below the national average of £30,000

Millennials The region has 124,784 25-39 Y/O.
Approx. 8k less than the national average for a region this size.

Retirement Risk is high in the region 272,685 reaching retirement age in the next 10 years. Approx. 27k more retirees than the national average for a region of this size.

Health Risks increase of 4255 (7%) 55 to 64 year olds.
Potentially an issue for public services

Skills and Education 4900 (9%) Decrease in 19 – 29 yr olds

Experience Risks 7300 (7%) drop in experienced workers in the age group 45-54

Source: Emsi Burning Glass 2022

| | Population 2021 | Jobs 2021 | GVA |
|--------------------------|-----------------|-----------|--------|
| Region | 707,599 | 267,129 | £11.1b |
| Carmarthenshire | 189,021 | 66,808 | £2.7b |
| Neath Port Talbot | 144,003 | 49,694 | £1.9b |
| Swansea | 248,586 | 105,728 | £4.4b |
| Pembrokeshire | 125,989 | 44,800 | £2.1b |

Labour Market and Industry | Skills Overview

The following provides insight into the supply and demand of relevant skills by comparing the frequency of skills present in job postings against skills present in today's workforce

Many roles are advertised multiple times, however in the following tables we can see how many unique job postings have advertised over time.

| OCCUPATION TYPE | 2019 Jobs | 2022 Jobs | 2019-22 Change | 2019-22 % Change |
|--|----------------|----------------|----------------|------------------|
| Managers, Directors & Senior Officials | 26,472 | 25,647 | -825 | -3% |
| Professional Occupations | 50,048 | 50,331 | 282 | 1% |
| Associate Professional & Technical Occupations | 32,309 | 31,543 | -766 | -2% |
| Administrative & Secretarial Occupations | 33,488 | 33,017 | -472 | -1% |
| Skilled Trades Occupations | 32,187 | 30,702 | -1,486 | -5% |
| Caring, Leisure & Other Service Occupations | 28,500 | 28,662 | 163 | 1% |
| Sales & Customer Service Occupations | 25,713 | 24,612 | -1,101 | -4% |
| Process, Plant & Machine Operatives | 17,337 | 18,381 | 1,044 | 6% |
| Elementary Occupations | 42,479 | 41,858 | -620 | -1% |
| | 288,533 | 284,752 | -3,781 | -1% |

The region has seen a loss of jobs relating to Management, Professional / technical and skilled trade since 2019.

Possible causes based on industry feedback are:

- **Redundancies** (Covid impact)
- **Retirement** difficulty in refilling
- **Brain Drain** High skills in demand from competitors outside of the region.

There has been a 6% gain in machine operators.

The table below displays the most mentioned skills within the unique job postings in the region.

- **Web IT and digital skills** are mentioned in over 4% of all job ads
- **Care and Nursing** account for 8% of all job postings

In Demand Job Skills

| SKILL in Postings | Frequency Postings | Postings with Skill/Total (Jul 2021-Jun 2022) |
|----------------------------|--------------------|---|
| Nursing | 4% | 3,001 / 67,406 |
| Personal Care | 4% | 2,946 / 67,406 |
| Cascading Style Sheets | 4% | 2,800 / 67,406 |
| WebKit | 4% | 2,635 / 67,406 |
| Flexbox | 4% | 2,613 / 67,406 |
| Marketing | 4% | 2,549 / 67,406 |
| Service Quality | 4% | 2,493 / 67,406 |
| Mental Health | 3% | 2,289 / 67,406 |
| Auditing | 3% | 2,145 / 67,406 |
| Finance | 3% | 2,075 / 67,406 |
| Warehousing | 3% | 1,976 / 67,406 |
| Housekeeping | 3% | 1,691 / 67,406 |
| Key Performance Indicators | 2% | 1,659 / 67,406 |
| Accounting | 2% | 1,379 / 67,406 |
| Risk Analysis | 2% | 1,370 / 67,406 |
| Restaurant Operation | 2% | 1,295 / 67,406 |
| Invoicing | 2% | 1,189 / 67,406 |
| Numeracy | 2% | 1,125 / 67,406 |
| Cooking | 2% | 1,119 / 67,406 |
| Learning Disabilities | 2% | 1,117 / 67,406 |

The table below displays the most mentioned experiential skills within job postings.

- **Communication**
- **Management**
- **Customer Service**

are mentioned the most

In Demand Experience Skills

| SKILL in Postings | Frequency Postings | Postings with Skill/Total (Jul 2021-Jun 2022) |
|------------------------------|--------------------|---|
| Communication | 26% | 17,495 / 67,406 |
| Customer Service | 18% | 12,148 / 67,406 |
| Management | 15% | 10,287 / 67,406 |
| Welsh Language | 10% | 6,562 / 67,406 |
| Sales | 9% | 6,207 / 67,406 |
| Teaching | 7% | 4,429 / 67,406 |
| Detail Oriented | 6% | 3,923 / 67,406 |
| Planning | 6% | 3,853 / 67,406 |
| Enthusiasm | 6% | 3,850 / 67,406 |
| Leadership | 5% | 3,732 / 67,406 |
| Self-Motivation | 5% | 3,076 / 67,406 |
| Interpersonal Communications | 4% | 2,595 / 67,406 |
| Research | 4% | 2,484 / 67,406 |
| Operations | 4% | 2,463 / 67,406 |
| Problem Solving | 4% | 2,360 / 67,406 |
| Innovation | 3% | 2,135 / 67,406 |
| Basic Math | 3% | 1,827 / 67,406 |
| Time Management | 3% | 1,770 / 67,406 |
| Resilience | 3% | 1,767 / 67,406 |
| Microsoft Excel | 3% | 1,758 / 67,406 |

Labour Market and Industry | Sectors

The table clearly indicates where we are seeing jobs growth and job decline based on 2020 – 2022 data.

Growth Sectors: Job Decline

- Wholesale and Retail
- Accommodation and Retail
- Agriculture
- Professional Scientific and Technical
- Financial and Insurance
- Information and Communication (ICT)

Growth Sectors: Job Growth

- Public Administration
- Administrative
- Construction
- Transport
- Energy, Electricity & Gas

| SECTOR | 2019 Jobs | 2022 Jobs | 2019-22 Change | 2019-22% Change |
|--|-----------|-----------|----------------|-----------------|
| Human Health and Social Work Activities | 46,940 | 46,933 | -6 | 0% |
| Wholesale and Retail Trade; Repair of Motor Vehicles and Motorcycles | 44,883 | 35,394 | -9,489 | -21% |
| Manufacturing | 25,302 | 26,737 | 1,435 | 6% |
| Public Administration and Defence; Compulsory Social Security | 23,973 | 26,045 | 2,072 | 9% |
| Education | 24,768 | 24,632 | -136 | -1% |
| Accommodation and Food Service Activities | 27,964 | 23,155 | -4,809 | -17% |
| Administrative and Support Service Activities | 17,163 | 20,202 | 3,038 | 18% |
| Construction | 14,387 | 17,241 | 2,854 | 20% |
| Agriculture, Forestry and Fishing | 13,041 | 12,322 | -719 | -6% |
| Transportation and Storage | 10,137 | 12,293 | 2,156 | 21% |
| Professional, Scientific and Technical Activities | 11,320 | 10,513 | -807 | -7% |
| Arts, Entertainment and Recreation | 6,008 | 6,440 | 432 | 7% |
| Financial and Insurance Activities | 6,467 | 5,679 | -787 | -12% |
| Real Estate Activities | 3,361 | 4,307 | 946 | 28% |
| Other Service Activities | 4,103 | 4,278 | 175 | 4% |
| Information and Communication | 4,784 | 3,878 | -906 | -19% |
| Water Supply; Sewerage, Waste Management and Remediation Activities | 2,396 | 3,288 | 891 | 37% |
| Electricity, Gas, Steam and Air Conditioning Supply | 887 | 825 | -62 | -7% |
| Mining and Quarrying | 655 | 634 | -21 | -3% |

Source: Emsi Burning Glass 2022

Labour Market Representation

Over Represented vs National Average: 2020 - 2022

The below details occupations in the region that are either over or under represented based on the national average over a combined 2 year period.

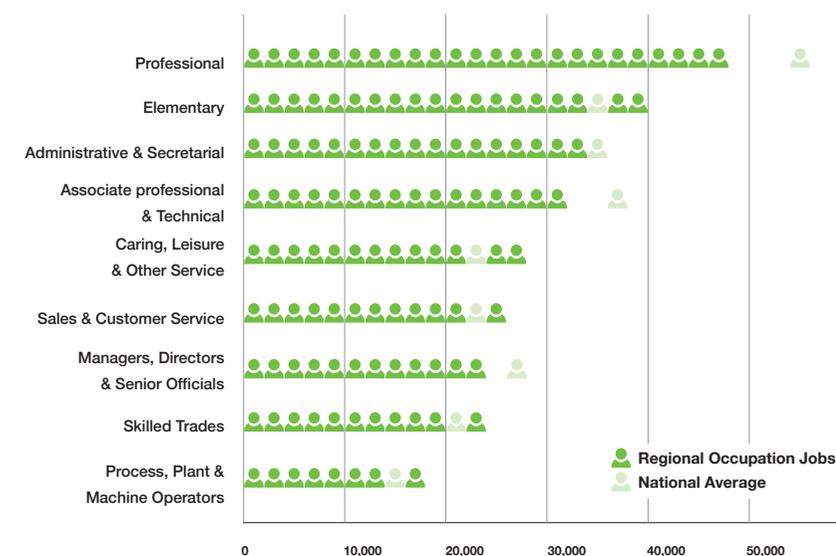
Over Represented This details where are on average more workers and industries are prevalent in the region compared to nationally. This often means that the demand for this industry type is higher in the region. Elementary & Caring professions are examples of this

Under Represented – This details the workers and industries that are not well represented in the region compared to nationally. This often means that the demand for this industry is lighter in the region, however it can also highlight growth and upskill opportunities.

Professional, Associate Professional & Technical, Managers / Directors & Senior Officials, Skilled Trades, Process Plant & Machine Operators

As a region there is an under representation of higher skilled higher paid job roles and an over representation of lower skill lower paid roles.

Cluster and survey responses report that they are struggling to fill many positions that are listed here as under represented such as management, professional and technical roles, therefore there is potential here to develop, reskill, upskill and encourage higher educational attainment.



Source: Emsi Burning Glass 2022

Workforce Barriers | What's preventing us attracting and retaining talent?

Economy Impact on Skills

The economy contracted by 0.1% in the second quarter of 2022, Office for National Statistics (ONS) reported. According to The Open University's Business Barometer 2022 report, published in partnership with the British Chambers of Commerce indicates that Welsh organisations are experiencing the knock-on effect of ongoing skills shortages and recruitment challenges, more than three quarters (77%) report seeing reduced output, profitability or growth with (69%) of SMEs currently facing skills shortages and 70% stating it causes increased workload on current staff.

Mobility of Workforce Population Density

With rising costs of fuel, insurance and vehicles, this presents a problem with workforce mobility especially in the more rural parts of the region and for young people. Pembrokeshire and Carmarthenshire are particularly impacted, they have a low population and the cost of getting to/from workplaces and training and education is more of a challenge. The current economic situation can potentially have an effect on:

- Recruitment and retention
- Workforce leaving to work more locally
- Recruitment catchment area becomes smaller
- Younger people unable to afford transportation
- More demand for home working
- Risk of losing skilled people to competitors offering more money and home working.
- Brain Drain issue could rapidly get worse
- Education and Learners
- Difficulty getting to and from education institutions
- Requirement of more eLearning and blended learning options

Apprenticeships

2020/21 saw 4860 apprenticeships started. 2,665 less in 2021 vs 2018 due to the impact of the pandemic. Healthcare and Public Sector being the highest intake sectors. Main reasons for not taking on apprentices, based on the RLSP survey results are:

- Issues making the time to mentor / train an apprentice
- Apprentice framework does not fit their business model / needs
- Unsure of the process
- Difficulty in recruiting suitable candidates
- Mobility restrictions of younger workers / Location / Lack of training in the area
- Remote working culture makes it hard to mentor
- Need skilled "ready to work" workforce
- Financial constraints

https://statswales.gov.wales/Apprenticeship_learning_programmes

Careers Advice / Work Experience

Careers advice and guidance has the power to change the life course of individuals which substantiates the importance of ensuring that young people (beginning at primary age) have access to representative and meaningful advice at every stage of their education. Clear advice and guidance not only affects life outcomes but it also has significant implications for social mobility and gender equality.

A leading report, authored jointly by [Educators and Employers](#) found that:

- The patterns of jobs chosen by 7-year-olds mirror those selected by 17-year-olds.
- Gender stereotyping about jobs is set from a young age.
- Family, TV, radio and film have the biggest influence on children's choices.
- Children's career aspirations have little in common with projected workforce needs, which could have serious implications for the future's economy.

Cluster group feedback has reported this to be a significant issue with it being a barrier to recruitment and retention within certain industries mainly based on peer pressure and gender stereotypes being imprinted from a very young age, specifically in the following sectors: Construction, Manufacturing and Engineering, Food and Land management, Health and Social Care and Leisure and Tourism.

A good case study where industry engages with education can be found here. [Kier | Engaging with local communities is key to addressing the skills gap in Wales.](#) There are also schemes in place that develop life skills for younger people which develop entrepreneurial and technical skills, The Bumbles of Honeywood & EESW being a good example of this. [The Bumbles of Honeywood Archives - 2B Enterprising / The Engineering Education Scheme Wales \(EESW\) | EESW | STEM Cymru.](#)

Greater Engagement between Careers Advisors, Teachers, Education providers and local employers would widen the knowledge of local skills requirements in education and work placement and this would potentially:

- Broaden young peoples' horizons and raise their aspirations
- Excite children about subjects they had potentially not known about, increasing motivation, confidence and attitude to learning
- Challenge gender and social stereotypes
- Improve academic attainment at GCSE
- Increase young people's earning potential
- Reduce the likelihood of young people becoming NEET
- Reduce the Brain Drain currently happening

<https://www.educationandemployers.org/drawing-the-future-report-published/>

Workforce Barriers | What's preventing us attracting and retaining talent?

Migration and Brain Drain

Employers are increasingly telling the RLSP of losing skilled individuals to England based companies. Net Migration figures tell us how many people are moving into and out of a specific area of the Region. Pembrokeshire, Carmarthenshire and Neath Port Talbot have positive migration figure (more people come in than leave) but Swansea has negative migration. The demographic data tells us that a higher volume of retirement age groups are moving in and younger age and experienced age groups are leaving.

Swansea: downward net migration trend,

- Over 1,200 15-29 year olds, left the area in 2020.
- Net Migration in Swansea for 2020 is -1539

Experienced workers

- Demographic data shows a decrease of 7,300 45-54 year olds in the region. This age bracket can contain the experienced skilled workers who could potentially be taking professional jobs such as much needed project managers. Cluster group feedback suggested that to ensure continuity of projects and driving forward of new large scale projects. More project managers are required in the region to retain talent.
- It has never been easier to work for a distance company. (e.g. live in Wales work for an English company) with a larger home working culture that the pandemic presented. The numbers on Migration and Student movements do not really take this factor into account, therefore the picture could be even worse.

<https://statswales.gov.wales/>

Students

- In 2019/20, of the 11,040 FE surveyed Welsh domicile graduates entering work, 7,990 (72%) entered work in Wales while 2,950 (27%) entered work in England.
- In 2019/20, of the 12,005 surveyed UK domiciled graduates from Welsh HEPs entering work, 7,105 (59%) entered work in Wales while 4,770 (40%) entered work in England.

Graduate Outcomes 2019/20: Summary Statistics - Summary | HESA

Older People in work

Over 1.3m people aged 50 and over are living in Wales, in 8 years time this figure is predicted to increase by a further 100,000 taking the figure up to 1.4m. Currently 69.4% of people aged 50 to 64 in the region are in employment.

13% of older workers have changed their retirement plans since the Pandemic stating that they now plan to work longer.

In Wales, 49% said they would like to retire but cant afford to however 46% of these stated they do not want to work past retirement age.

Overall, the relationship with older workers and employers in Wales is positive with 64% stating that their employer supports them to do their job well, however older workers on lower income or are required to do more manual work feel less supported and discriminated against.

76% of older workers stated they feel confident with their digital skills and 68% believe they have the right skills to do their current job.

Health and lack of opportunities for older workers are the main barriers for unemployed over 50's.

Older People in the Workplace | GOV.WALES

Filling the retirement hole

- 99,042 regional residents are aged 55-64. This poses a skills gap to fill over the next 10 years as this population moves to retirement.
- The under 9 population numbers dropped by 3% compared to pre pandemic.
- 5-15 age group is 12% less than the 55-64 group, therefore to just fill the roles of retirees alone will be challenging.

<https://statswales.gov.wales/>

Additional pressure will be created in the public services area for an ageing demographic such as Health care, mobility schemes, etc. and these sectors are already struggling to recruit, nursing and care being the most advertised jobs in the region during 2021.

Veterans, refugees, ex offender, NEET pathways to skilled trades should be embraced. This is currently being explored within the ECITB as a key area to grow the workforce within the Net Zero sector.

Barriers & Opportunities | By Sector



Construction

The main consideration is that **18%** of the workforce will be looking to **retire within the next 10 years** and demographic data suggests there are less younger people available to fill the gaps. Industrial automation could be a help in this respect. Sector perception of the future workforce is also of concern, with construction not deemed to be a valid career pathway for people in education. Increasing sector perception and industry 4.0 are a priority.



Leisure, Tourism & Retail

Workforce problems are the main barrier to growth for this sector, and actions are urgently required to encourage people back into this sector. There is huge opportunity in the region for Hospitality and Leisure with more people choosing staycations versus travelling abroad, but trying to maximise on this culture shift is a challenge with workforce recruitment being so problematic. Non essential retail has its own challenges, with less footfall on the high street and online shopping from large corporations becoming the norm, local retail faces challenging times ahead, but there is an increased demand from socially responsible shoppers for boutique & locally produced products to meet the need to reduce carbon footprints. This is a growth market to tap into.



Health & Social Care

With the ageing population in the region and the Healthcare sector being one of the biggest employers in the region, there are some key challenges ahead in all industry types within the sector. Although healthcare professionals and nurse roles are similar to 2018 levels, there will be a need for increased staffing levels in the coming years. The smaller employers in the region providing vital care and dentistry requirements are particularly struggling and require immediate support and a longer term support plan. Only Neath Port Talbot have more sector workers in 2022 vs 2018



Energy & Environment

This sector really needs to be thought of in terms of a new market that requires skills that slot into all levels of that new market, the concern is skills demands in this sector will be filled at the expense of other sectors like Construction, Manufacturing, Finance and Professional and Digital.

SWIC is a Regional Cluster group conducting feasibility studies into the industrial decarbonisation of the region aligned to WG Net Zero agenda and have compiled a skills requirements document to align with industrial decarbonisation. They have highlighted within the report specific barriers to skills that are being encountered, detailed below.

Source: SWIC Skills required for industrial decarbonisation and getting to Net Zero



Advanced Materials & Manufacturing

Recruitment and Staff Development are large concerns for the sector, the feedback received suggests that sector perception and wages are a concern due to potential candidates choosing to work in unskilled professions from other sectors. Couple this with an ageing workforce, new talent must be attracted to the sector.

Manufacturing will play a huge role in the delivery of Net Zero and decarbonisation, also based on the 2019 Welsh Government policy to implement 4.0 Industry, and the 2021 policy A Manufacturing Future for Wales 2021 embracing digital disruptive technology will be vital to address skills gaps and deliver continued growth.

MADE Cymru, claim that the future is within Disruptive Technologies and it is vital that manufacturing embrace digital technologies moving forwards. Therefore skills will need to be aligned with this transition which in turn could attract new talent to the sector.



Food and Land Management

The main perceived barrier to the industry to transform to Sustainable Land Management and other carbon neutral farming practices is that there is still uncertainty on the content and direction Welsh Government will agree to within the Food Wales Bill. Cluster feedback indicates that although the sector understands that changes to food production and land management are imminent, planning for the change cannot take place until industry knows the direction it has to take and the agreed processes it must follow. Therefore currently it is difficult to identify the training and skills needs that will be required for achieving sustainable food production.



Education Providers

Within the Digital 2030 policy, and the Manufacturing future for Wales framework, Welsh Government have addressed a need to ensure all learners have a good level of digital and industry 4.0 skills and see a vision of Wales developing a strong digital economy. Digital skills are fast becoming the heart of every sector with more demand from all industry types to utilise digital processes.

Within the Net Zero Carbon Budget policy, all sectors will need to have embedded “green skills” within their workforces and a huge knowledge and upskill process will have to take place. Recruiting educators for these roles is a challenge, both digital and net zero are large ever evolving skills and attracting talent to fill these roles is difficult



Public Sector

To Achieve Net Zero by 2030 in the public sector, skills need to be addressed, survey responders stated that **renewable skills will be the most required job skill in the coming years**, yet many employers in the sector are still unsure of what specific skills in this subject area would be needed.

Currently there are huge challenges in recruitment for digital and professional occupations, having clearer easy to access quality training in these skills would benefit greatly. Other hard to fill roles such as cleaners, caterers and care workers are urgently needed.

The sector are concerned about the quality of external training, citing many cases of having to untrain then retrain graduates and students



Digital

Digital skills are becoming the heart of every sector with more demand from all industry types to utilise digital processes. This is a key priority particularly when looking at the skills gaps in other sectors, by having a strong digital culture, all sectors can potentially alleviate many current skill gaps by adapting Industry 4.0 (AI, disruptive technologies, machine learning, automation etc). However the impact this will have on specific digital companies (93% of which are Micro) is already being shown with the reduction of jobs in this sector. Cluster feedback has not been all that supportive of the training provided to date, reports of HE and FE turning out basic skills only and new employees not being work ready. The difficulty here is that digital is an ever changing landscape and education providers struggle to recruit suitable trainers

Digital 2030: strategic framework | GOV.WALES

Delivering Economic Transformation for a Better Future of Work (gov.wales)



Financial & Professional

Within all recent Welsh and UK Government policy documents, a requirement for leaders, managers and financial experts were identified. Without these vital roles projects highlighted in SQW Economic Delivery Plan South West Wales, Net Zero Carbon Budget, Digital 2030, a Manufacturing future for Wales etc will all struggle to get underway. The Region decreased by 7,300 45-54 year olds from 2019 *Emsi Burning Glass 2022*. This age bracket can contain experienced skilled workers who could potentially be upskilling to professional jobs. There is also a year on year decrease in the number of apprenticeships taking place within this sector. Better visibility of progression pathways for already experienced workers is required to retain the talent being lost

Future Planning in the Region - Upcoming projects

Regional Economic Delivery Plan

Mission 1

A UK leader in renewable energy and the net zero economy

- Dragon Energy Island
- Neath Port Talbot decarbonisation
- Domestic Retrofit / decarbonisation
- Carmarthenshire renewable energy projects
- Circular economy hub
- Freeport of Milford Haven
- Milford Haven energy
- STEP: Spherical Tokamak for Energy Production
- Global centre for rail excellence
- Swansea Bay and South West Wales Metro
- Pembrokeshire public transport interchanges
- Rail service improvements South West Wales
- Regional digital connectivity
- Pembroke Dock Marine

Mission 2

Building a Strong Resilient Business Base

- SWW Virtual innovation agency
- SWW Entrepreneurship & Enterprise
- Baglan Bay & Port Talbot Waterfront
- Freeport of Port Talbot
- Swansea Central North
- Carmarthenshire sound stage
- Pentre Awel, phase 2
- Haverfordwest airport redevelopment
- Pembrokeshire food park
- Local supplier development
- Skills and talent programme
- Support of SME's through procurement / growth and innovation
- Supporting new start ups.

Mission 3

Growing and Sustaining the experience offer

- Town centre regeneration
- NPT town centre regeneration
- Carmarthenshire rural initiatives
- Pembrokeshire town centres
- Small town and coastal zone regeneration
- Transforming Tyisha Llanelli
- Discover Pembrokeshire
- Regional waterways project
- Lower Swansea valley heritage & destination
- Carmarthenshire visitor experiences
- Pembrokeshire port infrastructure
- Affordable housing delivery

South West Wales Regional Economic Delivery Plan

New West Wales Hospital

The new hospital is going to be built to a Biophilic design concept, this is an innovative approach to architecture that seeks to connect building occupants more closely to nature, incorporating elements such as natural lighting and ventilation, natural landscape features etc for creating a more productive and healthy environment for people. The project is worth £1.3 billion and includes the repurposing of existing hospital sites into new community sites for health. The health board aim to recruit local contractors not just to build the new hospital and new community sites, but to supply the maintenance on these sites moving forward.

City Deal

The Swansea Bay City Deal (SBCD) is an investment currently estimated to be worth £1.2bn across a portfolio of 9 major programmes and projects throughout the Swansea Bay City Region. The impact of the portfolio is based on generating at least £1.8 billion Gross Value Added (GVA) and providing at least 9,000 jobs to the region.

The 9 programmes and projects include:

Homes as Power Stations

Digital Infrastructure

Skills and Talent

Pentre Awel Wellbeing Village

Yr Egin Creative Hub

Pembroke Dock Marine

Supporting Innovation and Low Carbon Growth

Swansea City Waterfront Digital District

Lifesciences, wellbeing and sports campuses

Future Skill requirements | What's needed...

Core transferable skills All Sectors

The region is lacking in key transferable skills.

STEM Knowledge

- Engineering and Technology
- Mathematics, Physics, and Biology
- Scientific and mathematical reasoning
- Environmental / sustainability sciences

Management and Leadership

- Management upskill pathways to be made available.
All sectors seeing issues with recruiting managers
- Business administration

Technical skills

- Technical equipment usage and repair

Digital and data skills

- Data problem solving
- Cyber Security, high level and to be included at some level in all developer / cloud applications
- Analysis
- Evaluation
- Computer sciences
- IT / Programming
- Cloud computing
- Social Media
- Smart Manufacturing / Disruptive Technologies
- STEM

Green (Net Zero) Skills

- System to underpin green skills to all job roles
(Like current H&S training)
- Specific Green skills in all sectors
- Upskill / reskill the current workforce
- Underpin all education and skills with “Green Knowledge”

Sector Specific Future skills

Energy

New project process, skill requirements

- Pre Consent
Design, Procurement, Survey, Early consenting works
- Consenting
Environmental Assessment / Scoping
- Pre – Construction
Survey, Design, Procurement, Site preparation
- Manufacturing
Cables, Turbines /Panels etc, Structures
Floating foundations, secondary equipment
- Construction
Fabrication & Assembly, Cable installation, transport & installation, substation installation, commissioning
- Operations
Monitoring, maintenance, operations

Energy Specialist knowledge

- Turbines
- Solar
- Hydro
- Nuclear
- Marine / Floating platform / Tidal
- Environmental
- Ecological
- Renewable technologies
- Energy Storage
- Carbon Capture / Decarbonisation
- High Voltage electrical engineers

Construction

- Retrofit (Trust Mark) assessors
- Net Zero sustainability in construction methods
- 3D printing / Robotics / Modern construction methods
- Materials

Sector Specific Future skills

Manufacturing

- Smart Manufacturing / Disruptive Technologies / Digital
- Materials (sustainability, circular material products)
- Energy storage manufacturing
- Battery manufacturing
- STEM

Tourism, Hospitality, Retail

- Sustainability
- Digital

Transport

- Electric vehicle mechanics
- Charging facility engineers
- Rail engineers
- Electrical engineers

Food and Land Management

- Better utilisation of blended learning
- Organic practices
- Food Production Scientists
- Woodland / soil management
- Environmental / Ecology / Sustainability
- Bee Keeping
- Horticulture
- Bio gas capture / storage
- Hydrogen powered machinery

Health and Social Care

- Dentistry
- Nursing
- Higher degree apprenticeships . Doctors surgeons etc
- Mental health workers

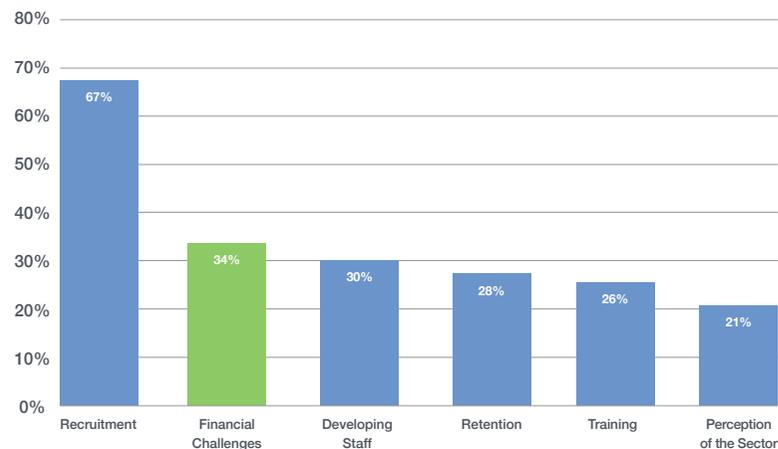
Education

- Educators at all levels to teach and deliver these new skills

RLSP Skills Survey Overlapping themes • Skills & Recruitment • All Sectors

Main Challenges Facing Businesses

Recruitment is by far and away the biggest challenge at the moment to employers. However, many commented about **financial challenges**, be that internally or inflationary pressures, therefore when combining verbatim responses with actual answer response, **Financial Challenges becomes a major factor**.



RLSP Skills Survey

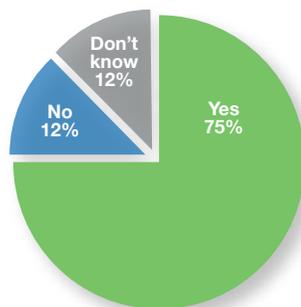
Skills gaps Current

75% of survey responders stated they are planning on recruiting in the next 12 months, yet **55%** stated they currently experience skills challenges within their organisation. With **73%** struggling to recruit specific roles. Taken from open end verbatim responses the biggest skills requirements are:

- **Skilled trades**
Construction (all roles), Drivers, Chefs, Fabrication, Nurses, Care workers, Mechanics, Production, Administration
- **Professional Occupations / Management and Project Management**
- **STEM**
- **Health & Care professionals**
- **IT, Developers and Software professionals**
- **Logistics management**
- **Cross Sector Green Skills**

RLSP Skills Survey

Planning on Recruitment?



Soft Skills

17% of responders stated that new staff were work ready, the main issues of not being work ready mainly related to:

- Perceptions of the job role
- Low enthusiasm / motivation, poor attitudes
- Untidy/ ill disciplined
- Lack people skills (communication, problem solving etc)
- Lacking Experience / Skills / Qualifications

Many employers are now looking for correct attitudes to work rather than specific skills with a view to internal training and progression. **Work ready programmes / work experience have been requested from all sectors**. Key soft skills they now look for are:

- Communication skills
- Problem solving
- Leadership / ownership
- Product knowledge
- Computer literacy
- Understanding instruction
- Resilience
- Confidence

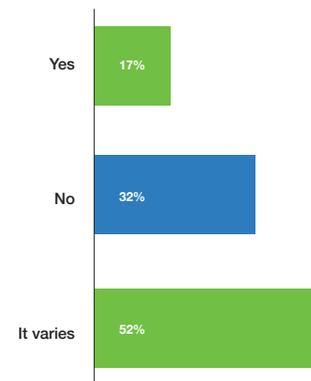
Future Skills

Although just **17%** stated they will be looking to recruit job roles aligned to the Net Zero agenda, Renewable Energy skills was the highest skill listed when asked what will be required in the future. Employers need more clarity on Net Zero obligations and opportunities. Extensive comments in relation to this question and prominent skills taken from those comments include:

- Digital / IT/ Programming / Software
- Nursing / Care
- Catering and Hospitality
- Leaders / Management / Project Leaders
- Teachers / Lecturers
- Ecology / Sustainability

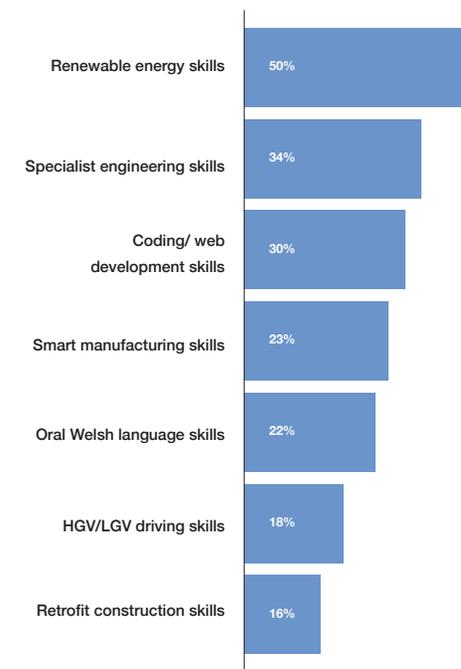
Many comments regarding future skills replicate current skill requirements.

New Entrants Work Ready?



RLSP Skills Survey

Skills Required - next 5-10 years?



RLSP Skills Survey



Construction

Workforce

3,112 Employers in Region

In 2021 employ 17,066 people, 19% more than in 2019

Business Size

- 93% Micro
- 6% Small
- 0.8% Med
- 0.2% Large

18% of workforce potentially retiring within next 10 years, 80% are Males

Source: Emsi Burning Glass 2022

Education

Apprenticeships in 2021/22

- 370 Foundation Apprentices
- 185 level 3
- 20 Level 4 or higher

Education in the Workforce

- 13,320 Educated between NVQ 1 – 3
- 2,941 Educated to level 4 or higher

Lack of qualifications available for timber frame housing and equipment design for new homes.

No Training providers in SWW offer a Groundworkers Apprenticeship.

Source: <https://statswales.gov.wales>

Sector Skills

Increases 2018 - 2022

- 24% increase of Electricians
- 31% increase in Scaffolders
- 39% increase in Roofers
- 26% increase in Plant operatives

Decreases 2018 -2022

- -14% in Plasterers
- -26% in Painters and Decorators
- -5% in bricklayers

Source: Emsi Burning Glass 2022

Skills Survey 2022

- 70% have difficulty in recruiting specific roles
- 69% are planning to recruit within 12 months
- 27% stated staff retention is an issue
- 73% of surveyed employers have apprentices



Key Findings

Skills Survey 2022 - 65 survey responses

Challenges

- Recruitment
 - Perceptions of the sector
 - Low Wages
 - Low amount of applicants/ too much competitive choice
- Training and Developing Staff
 - 12% stated new staff are work ready
 - skills / qualifications, experience and poor attitude being the main negative factors
- Financial Issues
 - Cost of raw materials
 - Inflationary pressures / Fuel
- 69.5% reporting skills challenges.
 - Most prevalent areas:
 - Skilled trade and plant operation roles
 - Professional roles, e.g. Purchasing, Planning. Management etc
- 37% Experience barriers to training.
 - Most prevalent areas:
 - Lack of funds
 - Visibility and availability of training
 - Course flexibility
 - Time restraints
 - Lack of quality local providers
- 21% potentially planning to recruit
 - Net Zero job skills

Actions

Replace a retiring workforce

Continue to ensure the good flow of skilled trades, apprenticeships urgently needed in the following trades

- Painters and Decorators
- Plasterers
- Bricklayers

Embrace new automated technologies

Teachers and Lecturer availability, Specific pathways

- Trust Mark
- Renewables / Sustainable materials
- Timber Frame
- Steel Frame
- Groundworks

Upskill for Trust Mark / MCS

- Better utilisation of blended learning

Update current learning to include new construction guidance

Most difficult to recruit roles advertised job roles are

- Bricklayers
- Groundworkers
- Painters and Decorators
- Plasterers
- Welders
- Pipe fitting
- Electrical / engineers / fitters / designers
- Supervisors / site managers
- Mechanical engineers / fitters



Advanced Materials & Manufacturing

Workforce

In 2021, 1,222 Employers in Region

- 81% Micro
- 13% Small
- 5% Med
- 1% Large

Employ 21,071 people, 0.8% more than in 2019, **20% of workforce potentially retiring within next 10 years**, 76% are Males.

Source: Emsi Burning Glass 2022

Education

Apprenticeships in 2021/22

- 175 Foundation Apprentices
- 140 level 3
- 5 Level 4 or higher

Education in the Workforce

- 14,946 Educated between NVQ 1 – 3
- 5,524 Educated to level 4 or higher

Source: <https://statswales.gov.wales>

58% of surveyed employers have apprentices

Sector Skills

Increases 2018 - 2022

- 19% increase of Iron / Steel Manufacturers
- 6% increase in Production Managers and Directors in Manufacturing
- 4% increase in Elementary Process Plant Occupations

Decreases 2018 - 2022

- 8% drop in Metal Working Production and Maintenance Fitters
- 10% in Assemblers
- 11% in Metal Working Machine operators

Source: Emsi Burning Glass 2022

Skills Survey 2022

- 80% have difficulty in recruiting specific roles
- 74% are planning to recruit within 12 months



Key Findings

Skills Survey 2022 - 27 Responders

Challenges

- Recruitment issues - 70% are planning on recruiting in the next 12 months yet 80% stated they have difficulty in recruiting
 - Competition from other employers
 - Low Wages
 - Low amount of applicants / lack of interest in the sector
 - Geographic locations
- Training and Developing Staff
 - 7% stated new staff are work ready
 - Skills, Experience and poor motivation / attitudes are being the main negative factors
- 60% reporting skills challenges spanning.
 - Most prevalent areas:
 - Skilled trade and process machine operations
 - Professional roles, e.g. Purchasing, Planning, Management etc
- Soft Skills Challenges
 - Problem solving
 - Leadership / Ownership
 - Communication skills
 - Basic Numeracy
- 15% potentially planning to recruit Net Zero job skills

Actions

Sector to engage with pre and post 16 education

Fit for work programmes to ensure relevant general job skills are covered. Such as:

- Leadership / Management
- Communication/ written / verbal / understanding and or issuing instruction
- Digital Oriented
- Numeracy
- Operations
- Customer Service
- Quality Control
- Planning / Detail Oriented
- Problem Solving

Showcase Disruptive Technologies / Industry 4.0 technologies to the sector.

Skills needed now:

- Production Operatives
- Machine operatives
- Manufacturing Operations
- Engineering skills
- Mechanical skills

Raise awareness of the Net Zero Carbon Budget to showcase the opportunities

Cross sectoral cooperation. Create a skill pool that can service cross over industries

- Welders
- Engineers
- Metal workers
- Machine operators



Workforce

In 2021, 1,801 Employers in Region

Business Size Jobs rise / fall since 2018

- 55% Micro
- 39% Small
- 6% Med
- 1% Large
- Pembrokeshire -1,285
- Swansea -1928
- Carmarthen -273
- Neath Port Talbot +494

Employ 46,982 people, 6% less than in 2018.
22% of workforce potentially retiring within next 10 years, 78% are Females

Source: Emsi Burning Glass 2022

Education

Apprenticeships in 2021/22

- 1915 Foundation Apprentices
- 1900 level 3
- 920 Level 4 or higher

Education in the Workforce

- 24,824 Educated between NVQ 2 – 3
- 20,025 Educated to level 4 or higher

Source: <https://statswales.gov.wales>

Sector Skills

Increases 2018 - 2022

- 4% Midwives
- 7% Nursery Nurses
- 4% Welfare professionals
- 6% Occupational Therapist
- 6% Radiographers

Decreases 2018 -2022

- 5% Care Workers
- 5% Senior Care workers
(Note: this equates to 600 less people since 2018)
- 23% Dental Nurses
- 11% Pharmaceutical Technicians
- 21% Animal Care services / 33% Veterinarians
- 27% Veterinary Nurses

Source: Emsi Burning Glass 2022

Skills Survey 2022

- 82% have difficulty in recruiting specific roles
- 90% are planning to recruit within 12 months



Next 5-10 Years Skill Requirements

- Renewables
- Welsh Language

41% of surveyed employers have apprentices, of those that don't:

- Framework does not fit needs
- Unsure of the process

49% say they experience barriers to training

- Time & Funds being the biggest drivers

Key Findings

Skills Survey 2022 - 77 survey responses

Challenges

- Recruitment Retention
Financial Challenges
Developing Staff Training
Sector Perception
- Training and Developing Staff
18% stated new staff are work ready Skills, Qualifications, Experience and poor motivation / attitudes are being the main negative factors
- 51% reporting skills challenges.
Most prevalent areas:
Care / Elderly and Child Health Care
Professional roles, Management
- Soft Skills Challenges
Communication skills
Computer Literacy
Leadership / Management
Welsh Skills
Reading and understanding information
- 57% stated Staff Retention is an issue
No Interest in this sector
Unsocioable Hours
Low Wages

Actions

Health Care

- Industry Perception work with pre 16 education to improve perceptions
- Post 16 Work experience processes
- Perceived qualification barriers

Pathways / Degree Apprenticeships to

- Leadership and management
- Doctorates
- Surgeons

Staff Retention / Recruitment

- Qualifications a barrier especially for part time workers, study time is not paid
- Mobility

Skills needed now / Most advertised job roles

- Carers / support workers (Urgently required)
- Staff nurse
- Dental

Equip workers with relevant soft skills prior to employment. The most mentioned Soft Skills in job postings are:

- Communication
- Welsh Language
- Understanding written instruction
- Leadership / Management
- Computer literacy
- Enthusiasm / Compassion
- Problem Solving / Planning
- Resilience

Digital Skills

- Losing staff to private companies, how to retain digital skills?



Leisure, Tourism & Retail

Workforce

In 2021, 13,020 Employers in Region

Business Size Jobs rise / fall since 2018

- 83% Micro
- 15% Small
- 1.9% Med
- 0.1% Large
- Pembrokeshire +399
- Swansea -3,333
- Carmarthen -587
- Neath Port Talbot +578

Employ 73,475 people, 5.3% less than in 2018, 53% are Males, 47% Female

Source: Emsi Burning Glass 2022

Education

Apprenticeships in 2021/22

- 130 Foundation Apprentices
- 180 level 3
- 25 Level 4 or higher

28% experience barriers to training

36% of surveyed employers have apprentices

Source: <https://statswales.gov.wales>

Sector Skills

Increases 2018 - 2022

- 16% (96) Hotel Managers and Proprietors

Decreases 2018 - 2022

- 7% (985) Retail and Cashier assistants
- 8.3% (361) Chefs Cooks & Catering assistants
- 38% (603) Publicans & Managers of Licenced trade
- 5% (139) Managers in Retail
- 31% (288) Pharmacy dispensing assistants
- 29% (107) Bakers and Confectioners

Source: Emsi Burning Glass 2022

Skills Survey 2022

- 70% have difficulty in recruiting specific roles
- 76% are planning to recruit within 12 months



Key Findings

Skills Survey 2022 - 100 Responders

Challenges

- **Recruitment**
Financial Challenges
Seasonality
Developing Staff
Sector Perception
Transport links (Mobility)
- **Training and Developing Staff**
14% stated new staff are work ready
Poor Attitudes, Lack of Experience, Low Motivation and confidence, are highlighted as the main negative factors
- 47% reporting skills challenges.
Most prevalent areas:
Skilled Trade Chef / Kitchen
Leisure and Service
Professional roles,
Management
- **Soft Skills Challenges**
Communication skills
Problem Solving
Knowledge
IT and Technology
Leadership / Management
Resilience
- 38% stated Staff Retention is an issue
No Interest in this sector
Unsociable Hours / Mobility links
Low Wages / competition

Actions

Apprenticeships

- Improve visibility of programmes to small and micro, market the programmes
- Easier to access, less bureaucracy
- Qualification differences between England and Wales
- Attracting older people to the sector

Mobility

- Options on mobility, for younger / unsocial hour workers

Net Zero

- Better visibility to business owners on roles and responsibility / opportunities

Equip workers with relevant soft skills prior to employment. The most mentioned Soft Skills in job postings are:

- Customer Service
- Communications
- Personal Hygiene
- Leadership / Management
- Detail Oriented
- Enthusiasm / Energetic
- Sales
- Training and Development

Skills needed now / Most advertised job roles

- Cleaner / Housekeeper
- Chef / Kitchen assistants
- Baristas
- Waiting Staff



Workforce

In 2021, 199 Employers in Region

Business Size Jobs rise / fall since 2018

- 69% Micro
- 23% Small
- 8% Med
- Pembrokeshire +11
- Swansea -79
- Carmarthen -197
- Neath Port Talbot +1329

Employ 3,951 people, 34% more than in 2018, 81% are Males, 19% potentially due to retire in next 10 years

Source: Emsi Burning Glass 2022

Education

Apprenticeships in 2021/22

ALERT: Limited pathways for Energy

Apprenticeships required

- High Voltage Electrical
- Jointers, Fitters, Connectors
- Senior Authorised Persons
- Marine Architects
- Control Instrumentation
- Mechanical & Design Engineers

36% of surveyed employers have apprentices
42% experience barriers to training

- No Framework for Net Zero
- No capacity to train
- Recruiting difficulty



Sector Skills

Requirements for Infrastructure projects Transversal skills

- Systems thinking / Communication / Leadership
- Environmental awareness / Circular economy
- Environmental policy engagement
- Digital skills

Technology based skills

- Hydrogen / Renewable power generation
- Battery production
- Carbon capture / Circular design
- Turbine Inspectors

Occupational job profiles

- Welders / Pipe fitters / Electricians / Engineers

Education and training

- STEM, EDI and training curricular

Source: Catapult: Risks to project development
– People, Skills and vocations

Skills Survey 2022

- 68%% have difficulty in recruiting specific roles
- 75% are planning to recruit within 12 months

Key Findings

Skills Survey 2022 - 20 Responders

Challenges

- Recruitment
Developing Staff
Training
Retention
Bureaucracy / Legislation
- Training and Developing Staff
26% stated new staff are work ready
Skills Required, Work Experience, Qualifications are the main negative factors
- 52% reporting skills challenges.
Most prevalent areas:
Management / Professional
Skilled Trade
- Soft Skills Challenges
Leadership / Management
Renewables
Communication / Problem Solving
Knowledge of Products
Technology
- 33% stated Staff Retention is an issue
Mobility links
Low Wages / competition

58% plan on employing based on the Net Zero agenda

Actions

Update qualifications as a matter of urgency

Consider a new sector with skills required for all parts of the sector set up

- Pre Consent
Design, Procurement, Survey, Early consenting works
- Consenting
Environmental Assessment / Scoping
- Pre Construction
Survey, Design, Procurement, Site preparation
- Manufacturing
Cables, Turbines /Panels etc, Structures / Floating foundations, secondary equipment
- Construction
Fabrication & Assembly, Cable installation, transport & installation, substation installation, commissioning
- Operations
Monitoring, maintenance, operations

Apprenticeships into the sector, to appropriate suitable skills required:

- High Voltage Electrical Engineers
- Jointers / Fitters / Technicians / Connectors
- Control installation
- Senior Authorised Persons / Authorised Persons
- Marine Architecture
- Large Structure Project Managers

New pathways could be opened to reskill:

- “Black Industry”
- Ex service personnel
- Ex offenders



Food and Land Management

Workforce

In 2021, 10,243 Employers in Region

Business Size **Jobs rise / fall since 2018**

- 87.2% Micro
- 10.9% Small
- 1.6% Med
- 0.2% Large
- Pembrokeshire -326
- Swansea -137
- Carmarthen -949
- Neath Port Talbot -232

Employ 22,227 people, 6.9% less than in 2018, 68% are Males, 32% Female, 23% potentially due to retire in next 10 Years.

Source: Emsi Burning Glass 2022

Education

Apprenticeships in 2021/22

Agriculture

- 120 Foundation Apprentices
- 95 Level 3

Food & Drink Manufacturing

- 145 Foundation Apprentices
- 40 Level 3

Source: <https://statswales.gov.wales>

35% experience barriers to training
43% employers have apprentices

Sector Skills

Increases 2018 - 2022

- 5% (244) Food Production and Production Management
- 18% (103) Fishing
- 6% (96) H&S, Inspectors and quality control

Decreases 2018 - 2022

- 7% (772) Farmers and Farm Workers
- 5% Purchasing Managers
- 1% (18) Food Production Engineers
- 28% (43) Horticultural
- 11% (104) Managers in Horticultural

Source: Emsi Burning Glass 2022

Skills Survey 2022

- 68% have difficulty in recruiting specific roles
- 70% are planning to recruit within 12 months



Key Findings

Skills Survey 2022 - 47 Responders

Challenges

- Recruitment
 - Financial Challenges
 - Developing Staff / Training
 - Poor Transportation Links
 - Sector Perception
 - Financial
- Training and Developing Staff
 - 13% stated new staff are work ready
 - Skills / Poor Attitudes, Lack of Experience, are being the main negative factors
- 60% reporting skills challenges.
 - Most prevalent areas:
 - Skilled Trade / Food Manufacturing
 - Process plant and machine operation
 - Professional roles,
 - Sales / Customer Service & Management
- Soft Skills Challenges
 - Leadership
 - Problem Solving
 - Agricultural / Horticultural knowledge
 - Communication
- 27% stated Staff Retention is an issue
 - Mobility links
 - Low Wages / Unsociable hours / competition

16% planning to recruit aligned to Net Zero

Actions

Skills needed now / most advertised job roles

- Packers / Pickers
- Technicians and food process engineers
- Butchery
- Seafood and fishery
- Managers
- Farm workers
- Bakery
- Arborists
- Drivers HGV

Equip workers with relevant soft skills prior to employment:

- Customer Service
- Detail Oriented
- Communication
- Packaging and Labelling
- Leadership / Management
- Strong work ethic

Promote local training and schemes that are already in place such as:

- Farming Connect – Carbon assessment calculators and advisors and soil scrutiny
- Food Skills Cymru
- Tasty Careers
- Food & Drink Careers Passport from the National Skills Academy for Food & Drink

Apprenticeships

- Level 3&4 not live
- Delay in seafood and fishery apprenticeships
- Brewing and beekeeping not covered
- Lack of Horticulture (Particularly Fruit and Vegetables)



Digital

Workforce

In 2021, 828 Digital industries in the region - however digital skills are in all sectors

Business Size Jobs rise / fall since 2018

- 92.3% Micro
- 6.4% Small
- 1.1% Med
- 0.1% Large
- Pembrokeshire +59
- Swansea -333
- Carmarthen -31
- Neath Port Talbot -2

The Digital sector employs 3,871 people, however within all sectors 8,200 people are employed. 45% below National Average.

Source: Emsi Burning Glass 2022

Education

Apprenticeships in 2021/22

- 50 Foundation Apprentices
- 285 level 3
- 65 Level 4 or higher

Source: Stats Wales:

Note: Gower College reported having just over ¼ of course spaces still available.

54% experience barriers to training Funds, Lack of local providers, Lack of appropriate training / qualifications, Time.

33% of surveyed employers have apprentices.

Sector Skills

Increases 2018 - 2022

- 12% IT Specialist Managers
- 16% Programmers & Software Developers
- 11% in Web Design
- 17% in Public Administration
- 18% in Graphic Designers

Decreases 2018 - 2022

- 5% IT Project and Programme Managers
- 6% Information Technology Directors

Source: Emsi Burning Glass 2022

Skills Survey 2022

- 56% have difficulty in recruiting specific roles
- 51% are planning to recruit within 12 months



Key Findings

Skills Survey 2022 - 27 Responders

Challenges

- Recruitment
 - Financial Challenges
 - Staff Development / Training
 - Perception
- Training and Developing Staff
 - 4% stated new staff are work ready
 - Lack of Skills, Experience, Qualifications and Work Ethic being the main negative factors
- 50% reporting skills challenges.
 - Most prevalent areas:
 - Professional occupations
 - Skilled trade occupations
 - C# & .NET
- Soft Skills Challenges
 - Problem Solving
 - Communication skills
 - Advanced / specialist/ basic IT skills
 - Coding Web Development
 - Knowledge
- 14% stated Staff Retention is an issue
 - Note:** Cluster group feedback is counter to this claiming retention is an issue, citing Brain Drain as the main retention issue

9% Planning to recruit aligned to Net Zero

Actions

Apprenticeships into the sector

- Framework revision
- Low uptake places still available

Mitigate Brain Drain and job losses from the sector

Ecosystem of cross sector cooperation, all sectors require digital skills, this poses a risk to talent for the digital sector

Future skills required

- 4.0 Technologies
- Digital Automation
- Internet of things
- Data problem solving
- Cyber Security, high level and to be included at some level in all developer / cloud applications.
- Analysis
- Evaluation
- Computer sciences
- IT / Programming
- Cloud computing
- Social Media
- Smart Manufacturing / Disruptive Technologies
- STEM

Training, lecturer availability

- Keeping up with developments
- Linking with industry to ensure course content is up to date

Skills needed now / most advertised roles

- .NET developers
- IT Support
- Software engineers
- Cyber Security
- Management



Financial & Professional

Workforce

In 2021, 2735 Businesses in Region

Business Size Jobs rise / fall since 2018

- 91.5% Micro
- 7.6% Small
- 0.7% Med
- 0.1% Large
- Pembrokeshire -668
- Swansea -1630
- Carmarthen -645
- Neath Port Talbot -479

Employ 20,600 people, 14.2% Decrease since 2018, 53% are Males, 47% Female, 15.5% potentially due to retire in next 10 years.

Source: Emsi Burning Glass 2022

Education

Apprenticeships in 2021/22

Management & Professional

- 10 Foundation
- 135 level 3
- 335 Level 4 or higher

Business & Admin

- 120 Foundation
- 115 level 3
- 150 Level 4 or higher

Source: <https://statswales.gov.wales>

39% of surveyed employers have apprentices.

33% experience barriers to training. Funds, Time and Lack of Provision are the main barriers.

Sector Skills

Increases 2018 - 2022

- 29% Property Housing and Estate Managers
- 12% Business and Related Associate Professionals n.e.c
- 4% Chartered and Certified Accountants
- 4% Business Sales Executives
- 6% Functional Managers and Directors n.e.c.
- 3% Financial Accounts Managers

Decreases 2018 - 2022

- 3% Financial Managers and Directors
- 8% Human Resource Managers and Directors
- 4% Marketing and Sales Directors
- 15% Solicitors
- 10% Finance and Investment Analysts and Advisers
- 9% Legal Associate Professionals
- 3% Actuaries, Economists and Statisticians

Source: Emsi Burning Glass 2022

Skills Survey 2022

- 78% have difficulty in recruiting specific roles
- 69% are planning to recruit within 12 months



Key Findings

Skills Survey 2022 - 42 Responders

Challenges

- Recruitment
 - Staff Development / Training
 - Retention
 - Succession Planning
 - Bureaucracy
 - Financial
- Training and Developing Staff
 - 17% stated new staff are work ready
 - Lack of Experience, Qualifications / Skills and Motivation are being the being the main negative factors
- 46% reported skills challenges.
 - Most prevalent areas:
 - Professional occupations
 - Administrative Managers/ Directors
 - Associate professional and technical
- Soft Skills Challenges
 - Problem Solving
 - Leadership & Management
 - Communication / Relationship building
 - Knowledge
 - Skills in new Technology
 - Welsh Language
 - Digital & IT
 - Writing and Reading Instruction
- 35% stated Staff Retention is an issue
- 8% Planning to recruit aligned to Net Zero

Actions

All management financial and professional roles will be urgently required for the regional economic delivery plan

Decline in Apprenticeship uptakes

- Region has underrepresentation of professional skilled managers.

Skills needed now / most advertised job roles (All Sectors)

- Business Development Managers
- Buyers / Procurement
- Human Resources
- Finance and accountancy
- Legal
- Marketing
- Managers
- Financial analysts

Equip workers with relevant soft skills prior to employment The most mentioned Soft Skills in job postings are:

- Communications
- Management
- Sales
- Customer service
- Leadership & Planning
- Welsh language
- Detail oriented
- Computer literacy

Population a decrease of 7,300 45-54 year olds in the region. Must mitigate brain drain within this demographic to retain experienced workers

Future skills

- Scientific, Computing and STEM Management



Education Providers

Workforce

In 2021, 783 Primary, Infant, Junior, Middle and Secondary Schools Institutions

Jobs rise / fall since 2018

- | | |
|-----------------|--------------------------|
| 4 Colleges | • Pembrokeshire +153 |
| 2 Universities | • Swansea -211 |
| Open University | • Carmarthen -277 |
| | • Neath Port Talbot -112 |

Employ 18,400 people, 2.4% Decrease since 2018, 28% are Males, 72% Female, 17% potentially due to retire in next 10 years.

Source: Emsi Burning Glass 2022

Education

Apprenticeships in 2020/21

- 120 Foundation Apprentices
- 115 level 3
- 150 Level 4 or higher

Source: Stats Wales:

65% of surveyed employers have apprentices.

34% experience barriers to training. Funds, Time and Lack of Provision are the main barriers.



Next 5-10 Years Skill Requirements

- Renewables
- IT / Coding/ Web
- Specialist Engineering
- Smart Manufacturing
- Welsh Language
- HGV
- Retrofit / Construction

Sector Skills

Increases 2018 - 2022

- 14% Higher Education Teaching Professionals
- 2% Vocational and Industrial Trainers and Instructors
- 1% Further Education Teaching Professionals

Decreases 2018 - 2022

- 5% Primary and Nursery Education Teaching
- 5% Teaching Assistants
- 8% Secondary Education Teaching Professionals
- 5% Teaching and Other Educational Professionals n.e.c.
- 1% Senior Professionals of Educational Establishments
- 4% Special Needs Education Teaching Professionals
- 6% Careers Advisers

Source: Emsi Burning Glass 2022

Skills Survey 2022

- 70% have difficulty in recruiting specific roles
- 66% are planning to recruit within 12 months

Key Findings

Skills Survey 2022 - 27 Responders

Challenges

- Recruitment
 - Financial Challenges
 - Staff Development / Training
 - Retention
 - Sector Perception
 - Bureaucracy
- Training and Developing Staff
 - 19% stated new staff are work ready
 - Lack of Experience, Qualifications / Skills and Motivation are the negative factors
- 57% reported skills challenges.
 - Most prevalent areas:
 - Skilled trade occupations
 - Professional occupations
 - Administrative
 - Associate professional and technical
- Soft Skills Challenges
 - Leadership & Management
 - Communication
 - Oral Welsh language
 - Problem Solving
 - Computer Literacy
 - Skills in new Technology
- 31% stated Staff Retention is an issue
- 21% Planning to recruit aligned to Net Zero

Actions

New Skill requirements

- Welsh Language
- Specialist Engineering / Smart Manufacturing
- Net Zero – Recruitment:
 - Renewables
 - Energy / Solar, Hydro, Wind, Battery
 - Circular Economics
 - Retrofit
 - Trust Mark
- Digital – Recruitment of digital trainers is an issue
 - .NET & C#
 - Coding / Computer science
- Construction
 - Timber Frame homes
 - Groundworks

Offer more blended learning where appropriate

Part of ecosystem of cooperation with Industry Sectors, to stay abreast with latest's systems / processes

Fit for work programmes

- Computer Literacy
- Problem Solving
- Communication
- Leadership / Management

Skills needed now / most advertised roles

- Teaching Assistants
- Primary and Secondary Teachers
- Lecturers
- Mathematics



Public Sector

Workforce

In 2021, 371 Institutions

Employ 25,588 people,
15.5% Increase since 2018.

Jobs rise / fall since 2018

- Pembrokeshire +34
- Swansea +1,588
- Carmarthen +79
- Neath Port Talbot +2,177

Employ 25,588 people, 15.5% Increase since 2018, 48% are Males, 52% Female, 21% potentially due to retire in next 10 years

Source: Emsi Burning Glass 2022

Education

Apprenticeships in 2021/22

- 2,045 Foundation Apprentices
- 1,880 Level 3
- 940 Level 4 or higher

84% of surveyed employers have apprentices.

45% experience barriers to training
Time and visibility of training offers are the main barriers.



Next 5-10 Years Skill Requirements

- Renewables
- IT / Coding/ Web
- Welsh Language

Sector Skills

Increases 2018 - 2022

- 9% increase in Public Order & Safety Activities
- 6% Justice and Judicial Activities
- 12% Defence Activities
- 7% in Public Administration

Decreases 2018 - 2022

- 23% Social Security
- 3% Fire Service

Source: Emsi Burning Glass 2022

Skills Survey 2022

- 80% have difficulty in recruiting specific roles
- 96% are planning to recruit within 12 months

Key Findings

Skills Survey 2022 - 28 Responders

Challenges

- Recruitment
 - Retention
 - Sector Perception
 - Financial Challenges
 - Staff Development / Training
 - Transport links (Mobility)
- Training and Developing Staff
 - 21% stated new staff are work ready
 - Lack of Experience, Qualifications / Skills are the negative factors
- 68% reported skills challenges.
 - Most prevalent areas:
 - Professional occupations
 - Caring, Leisure and other service occupations
 - Associate professional and technical
 - Skilled trade occupations
- Soft Skills Challenges
 - Advanced / specialist/ basic IT skills
 - Oral Welsh language
 - Leadership & Management
 - Communication skills
 - Problem Solving
 - Knowledge
- 50% stated Staff Retention is an issue
 - Low wages / Competition
 - Location (Mobility)
 - Lack of interest in the work

Actions

Net Zero Carbon Budget

- Better visibility of sector requirements

Digital needs, retention of digital skills

Sector cannot compete with the private sector on salary

- IT / Programming / Cyber Security / Social Media

Equip workers with relevant soft skills prior to employment The most mentioned Soft Skills in job postings are:

- Communication
- Leadership / Management
- Customer Service
- Welsh Language
- Problem Solving / Planning
- Enthusiasm / Detail Oriented
- Computer Literacy

Skills needed now / Most advertised job roles

- Carers
- Social workers
- Professional occupations, workforce planners, analysts, etc.
- Tradespeople and Labourers
- Occupational therapists
- Disability support
- Mental Health
- Planning and architecture
- Catering (schools)
- Cleaners

Key Learning Pathways - Management

These pathways are mainly completed internally, sector need access to good quality providers offering this type of progression/upskill training, current options are limited.



Summary of actions

Current skills gaps *Fair Work for all*

Focus on all Sectors to address skill gaps that they experience now, better visibility for employers and employees of:

- Upskill pathways
- Reskill pathways
- Improve visibility and widen scope of apprenticeships
- Encourage learning for life
- Improve sector perceptions
- Remove barriers and create ease of access – Bureaucracy, litigation, mobility etc
- Promote increased blended learning / eLearning
- Develop confidence

Create Ecosystems of support *Stronger Fairer Greener Wales*

Many Micro and Small employers do not have the opportunity to plan ahead. There is a changing skills landscape ahead in the region and ensuring all employers take full advantage of and can plan for the changes ahead are vital. Encouraging cross sector collaboration coupled with visibility of initiatives, skills programmes, learning support and opportunities would enable the small and micro employers in the region to forward plan and have a support network to share best practice with.

Engage Industry with Education *Learning for Life / Young Persons Guarantee*

- Pre 16. This is an ongoing concern that pre 16 educators are unaware of the skills available within the local area. Better connections between industry and pre- 16 education are needed to break down traditional stereotypes and to encourage emerging talent to work locally.
- Post 16. Better links with local industry can really help post 16 education to ensure that the course content remains relevant and up to date. Engagement with on site mentors from industry could be a vital link to ensuring that course content remains current.

Work Readiness *Learning for Life*

Just 16.5% of survey responders stated new employees were work ready, most stating that motivation and attitude being the biggest concern. A better approach to post 16 work experience is required coupled with work ready preparation training within education.

Net Zero *Net Zero Wales*

All employees and employers in Wales require upskilling in basic net zero practices, preferably some form of compulsory basic induction training similar to current H&S training. In addition, all education programmes should be underpinned with green knowledge in line with current thinking and sustainable methods. A huge nationwide education / training programme is required for Net Zero to gain traction.

Look to the future *Future Generations / Net Zero Wales / Digital 2030*

All sectors face skill framework changes in the next few years, be that from Net Zero, Digital 4.0, Energy or the national curriculum changes. Plans need to be in place now with clear pathways into the new and emerging skills that will be required in the coming years.

Brain Drain *Fair Work for all*

An ongoing concern. 40% of Welsh HE students on 2020 /21 now work in England. Employers and Welsh Government must promote Fair Work for Wales policies within Industry and the workforce to encourage the benefits of working in Wales.

Economic Inactive / Unemployed

Tackling economic inequality / Healthy Work, Healthy Wales

Levels of economic inactive have dropped, however unemployment has gone up, this is a prime demographic target group to upskill and reskill to help fill the skills shortage. Strong clear pathways for NEET, Veterans, ex offenders, Refugees, people recovering long term health conditions, older generation etc to upskill and re-enter the workforce are required as a matter of urgency.

Decline in teacher numbers

This needs to be addressed, Since 2017 ITE qualifiers in the region have been in sharp decline and very few are completing the qualification in the medium of Welsh.

Welsh Language *Cymraeg 2050*

Welsh Language needs to be encouraged further especially in education. The RLSP has heard many good case studies of FE and HE providers bolting on Welsh language syllabuses to courses so the student become a bi-lingual learner, thus improving future job opportunities. However the education sector have reported the loss of teachers to other regions where Welsh language is not a fixed requirement.

Management and Leaders *Learning for life*

There is an over representation of low skill low wage jobs in the region. The demographics data tells us there is a decrease in experienced 45 to 54 year olds. All sectors report recruitment difficulty in finding experienced leaders and managers.

Energy *Stronger Fairer Greener Wales*

Is now a growing sector in the region and will require all the skills associated without taking skilled roles from other sectors who are already struggling to recruit.



Summary of key actions

| Actions | Actions | Target Cohort | Enablers | Success Measure | Timeline |
|---|---|--|---|--|--|
| <p>Current Skill Gaps: Support employers to develop / retain / reskill and upskill their employees, encouraging leaning for life.</p> | <p>Focussing on priority sectors, develop clear progression routes for succession planning and allowing opportunity for upskill and reskilling, via promotion of:</p> <ul style="list-style-type: none"> • Apprenticeships • PLA's • Work Based Learning • Short courses • Blended learning / eLearning • Management pathways <p>Help employers especially small and micro to maximise non pay benefits such as work life balance, flexible working, inclusive practices etc, which has been proven to aid with recruitment and retention</p> | <p>Employees Employers</p> | <p>Employers Employees WBL providers FE / HE / Providers RLSP</p> | <p>Increases in uptake and completion rates of</p> <ul style="list-style-type: none"> • Apprenticeships • PLA's • Work Based Learning • Short courses • Blended learning / eLearning • Management pathways | <p>Ongoing Measure success rates measured every year: Oct 2023 Oct 2024 Oct 2025</p> |
| <p>Work Readiness To ensure employees are deemed work ready</p> | <ul style="list-style-type: none"> • Promote taster placement programmes • Ensure work readiness and confidence building is part of educational process • Explore what core skills employers require for an employee to be work ready. | <p>Job Seekers Work Experience</p> | <p>Employers Employees WBL providers FE / HE Careers Wales</p> | <p>Increase in employers stating new staff are work ready. Measured in future skills surveys</p> | <p>Measurement to take place in: July 2025</p> |
| <p>Talent access, support employers access to talent</p> | <ul style="list-style-type: none"> • Explore potential for shared WBL / apprenticeship programmes • Encourage a robust work experience programme • Create opportunities for employers to and employees to match talent to jobs (events / brokerage) • Focus on skills / sectors that LMI deem priority • Promote and encourage YPG and other employability programmes • Promote the extension of degree apprenticeships particularly within priority sectors | <p>Employees Employers</p> | <p>Providers Employers RLSP Careers Wales</p> | <p>Completion of Work Experience / placement programme Increases in employers taking advantage of YPG Increases of Degree apprenticeships</p> | <p>Ongoing measure Final measurement to take place in: July 2025</p> |



Summary of key actions

| Actions | Actions | Target Cohort | Enablers | Success Measure | Timeline |
|--|--|--|---|---|--|
| Ecosystems of support: Net Zero Transitioning | <p>Ensure all employers in the region are aware of opportunities and responsibilities for the delivery of Net Zero. Ensure industry has a clear path and understanding of their support network</p> <ul style="list-style-type: none"> • Cross sector collaboration via events and cluster meetings • Promote availability of upskill and reskill pathways • Encourage and promote Net Zero adoption • Collaborate and share best practice across all sectors | Employees Employers | Employers RLSP Providers Welsh Government | Cooperation and support groups established and in operation | Review each year Oct 2023 Oct 2024 Oct 2025 |
| Develop skills for current and future local employers requirements, engaging learners with industry and showcasing the exciting opportunities. | <p>Develop awareness with young people of the exciting and possible career pathways open locally.</p> <ul style="list-style-type: none"> • Sector perception improvement • Employers working with education to showcase local opportunities • Employers working with education using LMI to identify skill requirements | 14-19 | Careers Wales Schools Local Authorities Employers FE | LMI skills gap analysis | Oct 2025 |
| Place a clear focus on emerging Industry 4.0 Technologies, Cyber & Digital, Sustainability | <p>Using LMI focus on skills that have a high risk of automation with a view of encouraging and promoting employers to utilise automated systems to aid with the skills gaps. Raise awareness and actively promote new automated technologies within Industry, providers, employees and pre 16 education</p> <ul style="list-style-type: none"> • Organise events that showcase best practice • Share best practice • Clear focus on SME support • Promote local support networks such as MADE Cymru / Business Wales • Work to ensure that Apprenticeship Frameworks (including championing more Degree Apprenticeships) reflect the needs of the sector • Encourage wider visibility of courses relating to Disruptive Technologies / Industry 4.0 technologies to the sector. | Employers Employees Pre & post 16 | Careers Wales MADE Cymru Business Wales RLSP Employers Providers | Increases in 4.0 Technologies educational attainment uptake Increases in Employers adopting automation processes | Ongoing to be measured every year Oct 2025 |



Summary of key actions

| Actions | Actions | Target Cohort | Enablers | Success Measure | Timeline |
|---|--|---|---|--|----------|
| Energy Sector Considered a new emerging sector in the region | <p>The Energy sector has the potential to add thousands of jobs by 2030 to the region.</p> <ul style="list-style-type: none"> • Encourage / promote educational attainment within this sector • Work with the sector and providers to identify skill challenges and educational gaps • Promote Apprenticeship pathways for green energy sector | Providers Employers Pre & post 16 | Careers Wales RLSP Employers Providers | Training pathways for renewable Energy sector. Apprenticeship programmes | Oct 2025 |
| Welsh Language | <p>Continue to promote WL within all sectors, demonstrating the positives from bi lingual culture.</p> <ul style="list-style-type: none"> • The RLSP have been and will continue to be proactive in raising awareness by hosting workshops with Industry clusters to highlight barriers and share best practice. • Another workshop is planned in partnership with Coleg Cymraeg in November 2022 with reporting and actions based around challenges and future actions the RLSP will implement. • Work with priority sectors (Health & Social Care, Public Sector, Retail, Leisure & Hospitality) to identify issues promote current best practice and create Welsh Language recruitment strategy. | Employers Employees | RLSP Employers Coleg Cymraeg | Increase in WL use within the RLSP | Oct 2025 |
| Future skill requirements Delivering the future | <p>Working with Education, Industry and local authority to identify what new and emerging skills will be required. LMI gap analysis to focus on:</p> <ul style="list-style-type: none"> • Collaboration with Providers to ensure relevant training pathways are open and ready • Upskill / Reskill • Digital / Cyber <ul style="list-style-type: none"> • Net Zero • Energy / Specialist knowledge • Sustainable Land Management | Providers Employers Pre & post 16 | Careers Wales MADE Cymru RLSP Employers Providers | Have course content and courses available for upskill and reskill processes in line with WG policy on. <ul style="list-style-type: none"> • Digital / Cyber • Net Zero • Energy / Specialist knowledge • Sustainable Land Management | Oct 2025 |



Summary of key actions

| Actions | Actions | Target Cohort | Enablers | Success Measure | Timeline |
|---|---|-----------------------------------|---|--|----------|
| Maximise the impact of the Young Persons Guarantee | <p>Improve visibility and promote the YPG within the region</p> <ul style="list-style-type: none"> • Encourage entrepreneurship culture • Raise awareness of business set up within the region • Raise awareness to under 25's of career pathways which are industry priorities • Raise awareness of educational courses that require greater participation | Employees Employers Post 16 | RLSP Careers Wales Industry Clusters | <p>Full awareness of the YPG within the regional employers</p> <ul style="list-style-type: none"> • Increased numbers of YPG uptake • Decrease in NEET numbers for under 25's in the region • Decrease in Economic inactive within the under 25's • Decrease in Unemployment within under 25's | Oct 2025 |
| Continued reviews of all sectors as new technology, policy and initiatives emerge | <p>Stay abreast of new emerging topics that can have benefits to and effects on local employers. Ensuring timely, accurate and useful information is shared and promoted.</p> <ul style="list-style-type: none"> • Policy updates • News / Best practice sharing • WG initiatives • New technologies • New ways of working | Employers Employees | RLSP TBC based on initiative | <p>TBC, based on new things that arise.</p> <ul style="list-style-type: none"> • Targeted regular newsletters / communication strategy • Level of uptake per initiative • Engagement with employers | Oct 2025 |



South West Wales
Employment and Skills Plan
2022-2025