

NORTH WALES REGIONAL SKILLS & EMPLOYMENT PLAN





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Welcome to the third annual Regional Skills & Employment Plan for North Wales as the region continues to develop and evolve economically, with a key highlight in the coming year being the work on the North Wales Growth Deal.

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

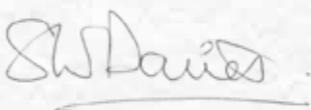
Working as part of a 'Team North Wales' approach, partners from industry, education & training, health, third sector, national & local government, and employer representative bodies amongst others, are all working towards our continued collective vision for a confident, cohesive region with sustainable economic growth, capitalising on the success of high value economic sectors and its connection to the economies of the Northern Powerhouse and Ireland.

The RSP and its partners in North Wales continue to address regional and local needs, whilst supporting national policy and planning. Highlights include having delivered with partners to date, over £50million of ESF funding for skills based projects in the last year; developed and delivered with employers from each of our key and growth sectors, a STEM focused programme to support early intervention and promotion for Years 5 & 6 pupils, their teachers, and parents, bespoke to North Wales economic opportunities, and shared with all 369 primary schools in the region; in addition to promoting a regional skills brokerage approach with applicable partners, now deployed to support Wylfa Newydd following its success at HMP Berwyn.

We continue to look forward to how our innovative approach to delivery in partnership with both employers and providers, will help to continue to improve and upgrade the regions skills base. This will be an encompassing approach that both targets improving the supply of advanced skills in high value economic clusters, in addition to addressing worklessness and in-work poverty via mechanisms that address the causes of economic inactivity and barriers to employment.

With skills being a cross-cutting theme that both complements and contributes to other key areas of work including supply chains, infrastructure, transport, and inward investment, we will continue as an RSP to work closely with, and support partners in these areas, to further promote North Wales, and our cross-border partners to build upon our strengths, opportunities, and diversity of talent.

As the Chair of the Regional Skills Partnership for North Wales, I would like to thank all our partners for their continued support, as North Wales continues to lead the way in collaboration, consultation, and delivery of outputs, to support higher current and future skills, for all parts of our growing economy.



SASHA DAVIES

Chair - Regional Skills Partnership North Wales

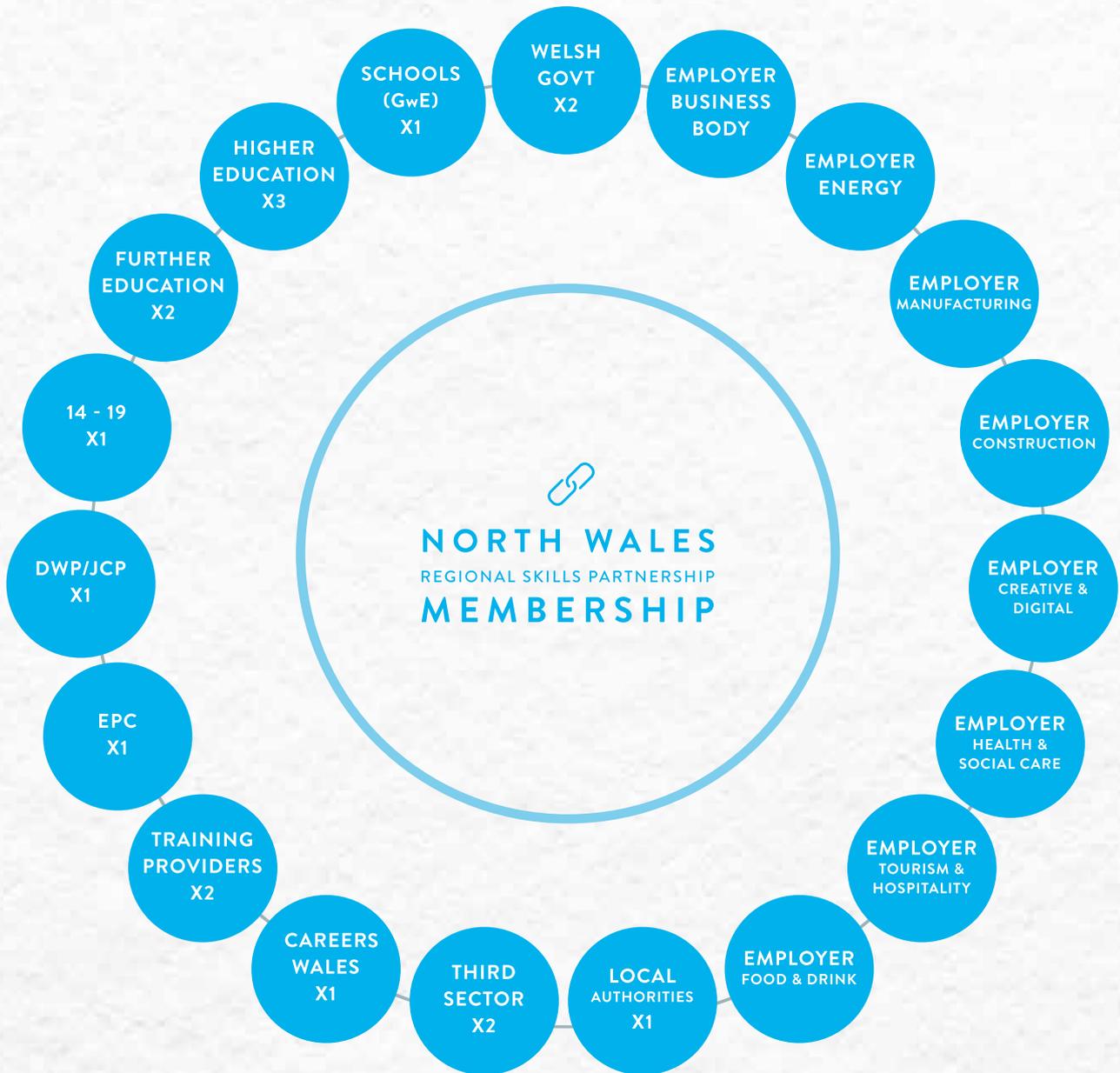


IN ASSOCIATION WITH

OVERVIEW OF NORTH WALES



north wales economic ambition board
bwrdd uchelgais economaidd gogledd cymru



Sasha Davies
(Horizon Nuclear Power)
Chair
Regional Skills Partnership



Sioned Williams
(Gwynedd Council)
Vice Chair
Regional Skills Partnership



Iwan Thomas
(North Wales Economic Ambition Board)
Regional Programme Manager
Skills & Employment



The Regional Skills Partnership in North Wales has a clear aim within this year’s Regional Skills & Employment Plan, to further align to the broader economic opportunities of the proposed North Wales Growth Deal. Supporting the North Wales Growth Vision in its ambition to add a further £7.2billion to the value of the regional economy by 2035, we continue to work as partners to support the improvement of the region’s skills base in response to employer and socio-economic needs.

This also includes influencing and informing as appropriate, the Programme for Government from Welsh Government, and its cross-cutting strategies. This includes how North Wales continues to support education at all levels, skills, training, & digital inclusion within an ‘Ambitious and Learning’ approach regionally, that is also clearly aligned to national policy; in addition to our contribution to a ‘Prosperous and Secure’ North Wales that supports its communities, language, and culture through retention and promotion of sustainable skills and higher paid employment.

#TeamNorthWales

Working regionally without boundaries to deliver sustainable growth via the inspiration of ambition, and an aspiration to improve opportunities for all

As an established partnership with clear and visible support from employers and providers, we collectively aim to continue to work with partners across our borders to the east into England, to the south into areas in Mid Wales, and also to the west with greater connections to Ireland, as we acknowledge and reflect the greater mobility of our labour market and its skills needs.

This will include a clear focus on improving the supply and retention of advanced skills in high value economic clusters, whilst also highlighting the relevance and value of bilingualism to our economy, and addressing worklessness, in-work poverty, and creating clearer, regionally focused, pathways into employment.

REGIONAL CHALLENGES FOR SKILLS & EMPLOYMENT

The primary longer term challenge for North Wales, is how we address a workforce replacement demand gap, potentially more than a skills gap

Need to further identify a change in approach to resourcing and staffing larger projects across the region due to an aging workforce, displacement, and retention issues for younger workers

We need more visible entry points into apprenticeships which upskill the current workforce as well as new entrants into smaller and medium sized enterprises in addition to the larger established employers

The Growth Deal should not be seen as a replacement for current EU funding, so clarity is needed on where this will be sourced in the future to support regional skills projects and interventions

Greater promotion of digital skills aligned to the STEM agenda, due to its growing cross-sector impact on productivity and innovation for businesses of all sizes and within all sectors

Promotion of wider core and transferable business skills in sectors affected by displacement due to larger projects, with training and support promoted for small and micro businesses

Need for a regionally aligned and coordinated careers and employment service approach amongst partners, that extends from schools and our work on influencing the new Curriculum for Wales, forward in to the current labour market

EXECUTIVE SUMMARY

REGIONAL SKILLS PARTNERSHIP DEVELOPMENTS SINCE 2016...

<p>“OPUS”</p> <p>Regional project to deliver support to those aged 25+ who are long term unemployed with multiple barriers awarded ESF funding</p>	<p>“AD-TRAC”</p> <p>Regional project to support those aged 16-24 with barriers preventing engagement with education, training or employment awarded ESF Funding</p>		<p>With Careers Wales, we launched the “Spotlight on North Wales” LMI leaflet for year 10 students at an event with Airbus & Lend Lease in Ysgol Y Creuddyn, Conwy</p>	
<p>Working more closely with employers across all our key and growth sectors to support and highlight future skills needs to inform WG Employability and Apprenticeship programmes</p>	<p>Developed closer working relationship with Princes Trust Cymru in supporting skills alignment and opportunity through projects at HMP Berwyn and across North Wales</p>	<p>Worked with the PROFI employability programme at Bangor University and developed the RSP led ‘Your Future is Bright in North Wales’ category for the PROFI awards</p>		<p>We were the first Regional Skills Partnership in Wales to hold a Regional Skills Summit to promote our Plan and partner led regional ESF Projects</p>
<p>Presented the Regional Skills Plan and issues on skills in North Wales and cross-border in Westminster to the All Party Parliamentary Group for North Wales</p>	<p>In partnership with the FSB, we delivered a regional conference promoting employability skills, attended by students, employers and providers</p>		<p>Extend the reach of the RSP as an identified regional stakeholder contributing to the components of shaping the future of Initial Teacher Training Education in Wales</p>	<p>To accompany our regional audit of all 16-24 NEET provision, we launched our ‘North Wales Youth Support and Provision Prospectus’ website</p>
<p>Following our win at the National Construction Excellence Wales Awards in the ‘Leadership & People Development’ category for our work supporting skills brokerage with partners at HMP Berwyn in 2016, we have once again been selected and shortlisted as a national finalist for the 2017 Awards</p>	<p>Invited to present evidence to the ‘Economy, Infrastructure and Skills Committee’ at the Senedd on the role of Regional Skills Partnerships and Apprenticeships</p>	<p>Supported Welsh Government with detailed evidence on skills & employment landscape in North Wales applicable to a bid supporting a potential Heathrow Hub in the region</p>		
	<p>The employer led ACT ON STEM schools programme for pupils, parents and teachers, officially launched at event with S4C, and now available in all 369 primary schools</p>	<p>Working with Lend Lease and MoJ, we hosted at Coleg Cambria a regional Celebration Event to recognise skills achievements on completion of build at HMP Berwyn</p>		<p>The Skills Brokerage model created at HMP Berwyn to support apprenticeships, training and employment now deployed to support Wylfa Newydd</p>

Our previous forecast from 2015 of upto 40,000 potential new jobs over the next ten years across North Wales remains unchanged. However, the mechanisms by which this can be achieved continue to evolve.

Working alongside partners on the development of the North Wales Growth Bid, in addition to supporting delivery and informing policy on Welsh Government programmes and initiatives remains our critical focus, and parallel to supporting regional skills priorities and local employment demands.



REGIONAL SKILLS PARTNERSHIP NORTH WALES - OUR AIMS FOR 2017-18

1	To work with partners supporting the development and implementation of the North Wales Growth Bid and its key areas of focus including 'Skills, Worklessness & Social Reform'
2	Support continued promotion of apprenticeships across the region, aligned to the Welsh Government Apprenticeship Policy, and in response to regional and local need, with a key focus on shared apprenticeship opportunities, where smaller businesses in more rural areas, can benefit from transferable skills
3	Shape and inform with partners, content for future apprenticeship programmes with improved communication to parents and teachers, in addition to highlighting the 'Junior Apprenticeship' mechanisms, & increased promotion of apprenticeships through the Welsh language
4	Support partners in addressing the outcomes of the Apprenticeship Levy and its impact for partners on both sides of the border – particularly as we approach the Westminster Government target of all affected employers will be on the Digital Apprenticeship Framework by April 2019, and its implication for Welsh domiciled workers
5	Employers in North Wales report that they place almost equal value on employability skills alongside academic qualifications. We will continue to work with partners in the region, and cross-border on addressing its impact not only on the skills agenda, but finds its contributory factors across other associated areas aligned to the North Wales Growth Bid
6	Complete the work of the task and finish group developing a 'North Wales Employability Toolkit', to further align to, and work with Welsh Government on their national employability plan, to inform a national programme by April 2019 titled "Working Wales"
7	Promote and share further our regional skills brokerage model deployed successfully at HMP Berwyn in Wrexham, and now developed with partners at Wylfa Newydd, to be utilised and deployed for other regionally significant projects as required
8	Promote further the importance of digital skills and enabling technologies of Industry 4.0 to support the digitisation of industry across all our key and growth sectors in North Wales. The sustainability of our current and future labour market, is dependent upon the competitiveness of our businesses and therefore Industry 4.0 'readiness' is essential
9	Promote further the relevance and value of bilingualism to our economy to support the Welsh language within our communities and workplaces, and support the language skills of learners.
10	Align further the RSP with the regional schools consortia for North Wales – GwE - and support their response to Donaldson; continuing our employer led input into the regional Pioneer Schools programme and the development of modules aligned with the Successful Futures Programme, sharing intelligence with cross-border delivery partners as necessary
11	Promote and deliver with partners, experiential learning opportunities through both Welsh and English languages, relating to real life and work situations, building on our promotion of key and growth sectors, with labour market intelligence and data from employers in North Wales and cross-border, to support pupils, parents, and practitioners
12	Develop our bilingual 'ACT ON STEM' programme beyond Key Stage 2, led by employers and delivered to all 369 primary schools in the region, to revise and update content, prior to extending into Secondary Schools and a continued pathway for Key Stage 3.

EXECUTIVE SUMMARY

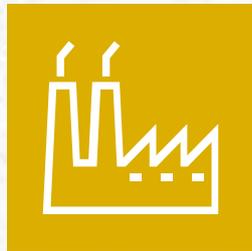
AN OVERVIEW OF NORTH WALES IN NUMBERS...

30,275	60,000	41%	81%
VAT/PAYE REGISTERED BUSINESSES IN 2016 COMPARED TO 29,875 IN 2015	ENTERPRISES NOW OPERATING IN 2016 COMPARED TO 58,000 IN 2015	OF THE WORKING POPULATION ARE IN 'FOUNDATION ECONOMY'	OF BUSINESSES IN NORTH WALES HAVE STAFF WITH WELSH LANGUAGE SKILLS
15.67%	70%	17%	14,300
OF MALES ARE NOW SELF-EMPLOYED ACROSS THE REGION & 6.6% OF FEMALES	EMPLOYERS IN THE REGION RECRUITED STAFF AGED UNDER 25 IN 2016	OF EMPLOYERS ACROSS THE REGION OFFERED APPRENTICESHIPS IN 2016	EU NATIONALS ARE CURRENTLY WORKING ACROSS VARIOUS SECTORS IN NORTH WALES

KEY SECTORS



ENERGY & ENVIRONMENT



ADVANCED MANUFACTURING & MATERIALS



CONSTRUCTION

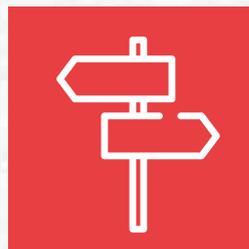
GROWTH SECTORS



CREATIVE & DIGITAL



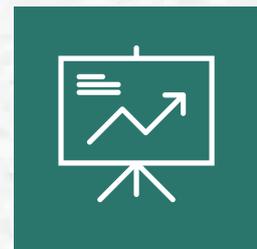
HEALTH & SOCIAL CARE



TOURISM & HOSPITALITY



FOOD & DRINK MANUFACTURING

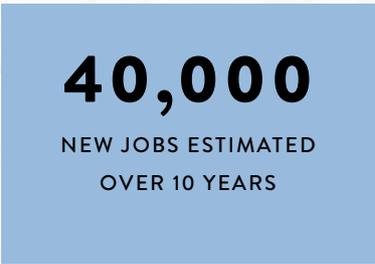


FINANCIAL & PROFESSIONAL SERVICES



“A confident, cohesive region with sustainable economic growth, capitalising on the success of high value economic sectors and its connection to the economies of the Northern Powerhouse and Ireland”

Growth Vision For The Economy Of North Wales (July 2016)



We regionally have the potential via our skilled current and future labour market, to help create aspiration, and improve productivity, competitiveness and growth across North Wales.

Working as partners across all sectors, and focused on the development of a Growth Deal for North Wales, we can look at key interventions working together, to stimulate growth, increase productivity, address low wages and economic inactivity, and make the North Wales economy more competitive and prosperous.

Already as a region we have delivered a flagship national project with the construction of HMP Berwyn at Wrexham which is now worth an additional £23million per annum to our economy. Going forward, we are taking the lessons learnt from there on engaging communities, creating apprenticeships and work placements, and delivering jobs & supply chain opportunities via a skills brokerage service with partners, to continue a coordinated and joined up approach for other large scale projects across the region.

“The challenge of stimulating jobs and investment in a community requires a range of different interventions, all working together, if it’s to be effective”

Ken Skates, Cabinet Secretary For Economy & Infrastructure (20 March 2017)

Having three Enterprise Zones within North Wales at Deeside, Anglesey and Snowdonia, alongside key business sites such as the established Wrexham Industrial Estate, a growing St Asaph Business Park, and the emerging Parc Cybi site at Holyhead, provide key beacons of economic activity which we can then further utilise to support balanced growth across all parts of the region.

The potential skills and employment benefits from flagship projects in development such as Wylfa Newydd on Anglesey, is a key contributor to an estimated £20billion spend on a collective of projects across the region that also includes the Orthios Eco Park, Parc Adfer Energy Recovery Facility, and further expansion of the Northern Gateway. Each of these should deliver benefits for wider services, in addition to both opportunities and challenges for local businesses and the labour market as movement of labour inevitably creates displacement.

OVERVIEW OF NORTH WALES

For all major projects to succeed in North Wales, we need an appropriately skilled and qualified workforce in the region prior to their commencement, and sustainable solutions will need to be developed to help ensure that displacement issues on a sectoral and skills basis are effectively planned to meet regional and local needs.

In North Wales we need an increasing 'place based' approach to skills which promotes inclusivity, increased productivity, and greater sustainability of opportunity for the region and cross border areas

Whilst there are 30,275 VAT registered businesses within the region, North Wales in total is home to over 60,000 enterprises, and therefore supporting and upskilling the current workforce should be viewed as equally critical alongside the attraction of young new entrants to the labour market if we are to remain collectively competitive. The challenge for the region is how do we make education relevant to the real needs of workers in our current labour market, while continuing to develop and support those individuals yet to enter the economy with consistent, regionally focused, careers advice and support.

KEY SECTORS



ENERGY & ENVIRONMENT



ADVANCED MANUFACTURING
& MATERIALS



CONSTRUCTION

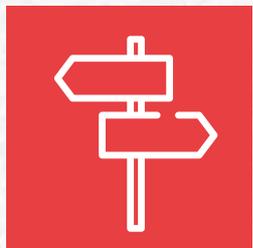
GROWTH SECTORS



CREATIVE & DIGITAL



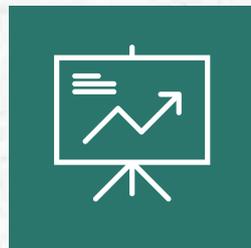
HEALTH & SOCIAL CARE



TOURISM & HOSPITALITY



FOOD & DRINK
MANUFACTURING



FINANCIAL &
PROFESSIONAL SERVICES



With the current population of 696,000 across North Wales, whilst there is clear depth of skills and expertise across many sectors, there are challenges ahead facing the region.

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

Without clear succession planning, coupled with early promotion of career pathways within schools on economic and employment opportunities, major projects may have to increasingly rely on inward skills from outside of North Wales.

10%

POPULATION AGED 16-24

22%

POPULATION AGED 25-44

27%

POPULATION AGED 45-64



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

North Wales also needs to identify how those within the foundation economy can also benefit and gain support from local and regional development opportunities. Local services and small employers attract many of those for whom issues such as transport, technology, and training often are challenges. Yet they help provide the foundation services for which all larger flagship projects and services require. The issues of mental and physical well-being in all sectors across North Wales are critical to supporting the skills base of our labour market, but particular focus may be required as part of a rebalance of appreciation for how the foundation economy is a key contributor that both underpins, and features within, our flagship key and growth sectors in North Wales.

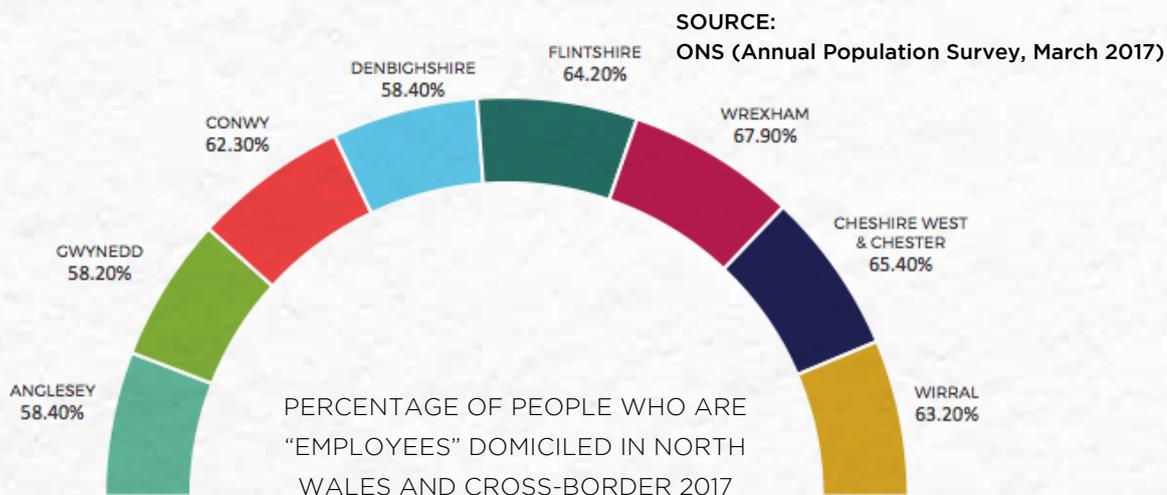
The retail and public sectors are two of the current largest employers in terms of employees within the region. The public sector particularly is one of the largest employers for example in North Wales, particularly counties such as Gwynedd and Wrexham.

Skills shortages within the health sector especially with its failure to recruit the volume required of qualified staff regionally, coupled with the potential impact of BREXIT, alongside ongoing budgetary issues as a result of austerity measures, will leave the wider sector across the region in a vulnerable position.

UP TO

173,000

PEOPLE COULD BE
CLASSIFIED
AS WORKING WITHIN
THE FOUNDATION
ECONOMY
IN NORTH WALES



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

Several North Wales companies are already engaged by Horizon Nuclear Power on the project across different sectors and specialisms. These include catering; construction; public relations; photography; ecological & environmental management; and waste management. This range of opportunity for the supply chain locally and regionally is expected to continue to expand through the remained of 2017 into 2018. A growing concern is whether the construction industry will be able to meet the demands of the transformational projects and other infrastructure projects being planned. Without clear timings and volumes of roles and skills requirements from developers it is difficult to effectively plan and promote skills developments and opportunities within the sector, especially for our FEI's and Work Based Learning providers, and may harm the construction sector in North Wales in relation to its skills capacity and competitiveness to respond effectively.

Additional information required on many of our key regional projects being made available during 2017-18 will greatly assist all appropriate future workforce development interventions for the construction sector, that will aid providers and sector employer representative bodies to tailor skills training and provision to clear timetables. This will greatly contribute to the development of higher level skills, in addition to apprenticeships at all levels, including greater promotion of higher level apprenticeships where applicable and required.

57%

EMPLOYERS RATE STAFF WITH WELSH LANGUAGE SKILLS AS IMPORTANT

81%

BUSINESSES IN NORTH WALES HAVE STAFF WITH WELSH LANGUAGE SKILLS

37,000

YOUNG PEOPLE ARE TAUGHT IN WELSH MEDIUM SCHOOLS ACROSS NORTH WALES



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

Entrepreneurship and self-employment continues to play a major factor within the economy of North Wales, with counties such as Anglesey and Gwynedd both seeing continued overall increases year on year.

In Gwynedd, the percentage of working age males who are self-employed has increased from 19.8% in 2016, to 23.1%; and in Flintshire, the percentage of working age females who are self-employed has increased from 3.7% to 4.8%.

The creation of new businesses provides the region with further skills and employment opportunities, and increasing support from education and training providers will be critical to help their sustainability and development in the longer term.

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

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

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

The recent Employer Perspectives Survey for 2016 had 519 employers within North Wales take part, and provides an interesting snapshot in that 67% said they do offer training to their current workforce, and FE colleges were often the first choice, followed by 51% of employers using commercial and private trainers due to the relevance and flexibility offered. The survey also showed that 63% of employers thought work experience was crucial, but only 26% offered this in 12 months.

6.6%
OF WORKING AGE FEMALES
ARE SELF EMPLOYED

15.67%
OF WORKING AGE MALES
ARE SELF-EMPLOYED

OVERVIEW OF NORTH WALES

70%

EMPLOYERS IN NORTH WALES RECRUITED YOUNG PEOPLE IN 2016 (UPTO AGE 25)

17%

EMPLOYERS IN NORTH WALES OFFERED APPRENTICESHIPS IN 2016 (HIGHEST IN WALES)

41%

EMPLOYERS THINK 16 YEAR OLDS POORLY PREPARED FOR WORK, FALLING TO 36% FOR 17-18 YEAR OLDS

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

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

CROSS BORDER ECONOMY



The A55 expressway is a critical artery across North Wales linking to the M56, A494, A483 and other major road networks, that is used to promote routes and pathways for skills, employment, culture, science, and innovation.

However, it also links the emerging centres of excellence being developed to support skills in both the workplace and academia across North Wales and across the border.

Extending from the Menai Science Park and new Engineering Centre on Anglesey, to the potential suggested developments of a Hospitality Academy in Conwy, and Rail Industry Training Centre at Rhyl, to the planned flagship Advanced Manufacturing Research Institute at Deeside. This snapshot of the facilities and centres and excellence across the region from east to west, can then be further promoted with cross-border opportunities and the potential for the Cheshire Science Corridor and Thornton Science Park to be an additional extension of our regional offer and skills.

The extension of the excellence offered by the whole region into cross-border areas would mirror the expectations of business, and the mobility of employees and students, for whom there are no barriers.



With strategic sites promoting employment and high level skills across North Wales and into England, the skills and employment offer for this wider geography should not underestimated with its proximity to Liverpool, Manchester, and wide Northern Powerhouse geographies.

£22bn

IS THE GVA FOR THE
CROSS-BORDER AREA
KNOWN AS THE MERSEY DEE

27,000

COMPANIES ARE BASED
IN THE CROSS-BORDER
AREA STRETCHING FROM
FLINTSHIRE TO THE WIRRAL

380,000

JOBS CURRENTLY IN THIS
AREA WITH 50,000 NEW JOBS
TO BE CREATED BY 2040

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

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

28,300

PEOPLE APPROXIMATELY
TRAVEL INTO ENGLAND TO
WORK FROM NORTH WALES
(2016)

32,400

PEOPLE APPROXIMATELY
TRAVEL INTO NORTH WALES
TO WORK FROM ENGLAND
(2016)

17,700

PEOPLE APPROXIMATELY
TRAVEL INTO FLINTSHIRE TO
WORK FROM ELSEWHERE
(2016)

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

It is currently estimated that 83% of those domiciled within the cross-border area also work within the same geography, supported by access to employment in key strategic sites such as the Deeside Enterprise Zone, Cheshire Science Corridor, Wirral Waters, and proposed developments at Woodside Waterfront, Ellesmere Port Central, and the Wrexham Technology Park.

OVERVIEW OF NORTH WALES

Whilst 5,700 from Cheshire West & Chester, and 3,200 from Wrexham travel routinely into Flintshire for employment, similarly 11,300 from Flintshire and 5,700 from Wrexham travel routinely into Cheshire West and Chester for employment.

Within the working age population of the cross-border area (almost 600,000), only just under 1% are claiming Job Seekers Allowance. However, of those claiming this benefit, 28.9% of claimants within the cross border area have done so for over 12 months; and 10% of all claimants are under the age of 24 (10.9% in the Wirral and 10.5% in Wrexham).

To accommodate a target of 50,000 new jobs being created in the cross-border area by 2040, it is estimated that upto 25,000 new homes will also be built which will provide opportunities for the construction sector primarily from North Wales as well as cross-border geographies. However, there will need to be consideration for a programmed suite of builds to coordinate with other demands on the sector with key infrastructure projects ranging from Anglesey and Gwynedd, along the A55 corridor up to the Wirral.

Whilst the cross-border area is not eligible to proceed with its own Growth Bid or City Deal, both the North Wales Growth Bid, and the Cheshire & Warrington Growth Deal, are looking to mirror key components on either side of the border, to further enhance the synergy supporting skills, employability, careers support, transport and infrastructure, that are critical to our employers, labour market, and students for whom there are no barriers or borders to movement and progression.



The Regional Skills Partnership in North Wales has been working closely with partners on the construction of HMP Berwyn in Wrexham, and will continue to do now operational.

HMP Berwyn opened in Wrexham in February 2017 and will eventually house 2,106 men. The establishment is a Category C training prison and resettlement facility for men returning to North Wales. Those residing at Berwyn have access to a range of accredited educational and training opportunities provided by Novus Cambria, the Industries provider and Her Majesty's Prison & Probation Service. This partnership approach aims to support men in developing the skills and knowledge necessary to gain employment and to raise aspirations. College courses and work opportunities available on site are aligned with a number of the priority and growth sectors for North Wales including construction, hospitality and digital media.

The delivery of formal training and qualifications is enhanced by opportunities across the establishment to support men in developing confidence, decision making, problem solving and team working skills. Work coaches, resettlement workers and engagement managers also work on site and in the community to offer support to both businesses and men in custody to prepare for employment.



BREXIT & NORTH WALES

With BREXIT now being triggered, we now need more than ever to invest in the skills and talents of our domiciled current and future all-age apprenticeships in North Wales, to support employers, our key and growth sectors, and our current & future workforce.

With a current reliance on European Social Fund (ESF) and European Regional Development Fund (ERDF) for delivery of funding to projects supporting skills and employment across North Wales, the questions over future replacements of funding to support these areas of activity on the skills and employment agenda are still yet to be agreed and made clear.

The CBI in Wales mirrors the wishes of many employers and education & training providers in North Wales in that key principles for the negotiation for the UK's exit from the European Union, should include:

**A MIGRATION SYSTEM WHICH
ALLOWS BUSINESSES TO ACCESS
THE SKILLS AND LABOUR THEY
NEED TO DELIVER GROWTH**

**AN APPROACH THAT PROTECTS THE
SOCIAL AND ECONOMIC BENEFITS
OF EU FUNDING WITH GUARANTEES
TO REGIONS SUCH AS
NORTH WALES**

FSB Wales undertook a survey of its members in November 2016, the results of which have informed their report, 'A skilful exit: What small firms want from Brexit'.

From the survey of employers across Wales, it shows one fifth (21%) of small employers currently have EU staff. This national figure mirrors the overall regional perception for North Wales, but with the caveat in certain local geographies such as Llandudno for example, the tourism and hospitality sector has a higher proportion of EU staff.

Whilst there is much debate on the impact of BREXIT, there has yet to be approximate figures on the potential impact of BREXIT in North Wales in terms of people. Research the Regional Skills Partnership in North Wales has led, has drawn out the numbers involved, with a commitment to monitor and undertake further detailed analysis later in 2017.

14,300
EU NATIONALS
CURRENTLY WORKING
IN NORTH WALES

20,900
EU NATIONALS
CURRENTLY LIVING IN
NORTH WALES

3,900
OTHER NON EU
NATIONALS WORKING
IN NORTH WALES

9,700
OTHER NON EU
NATIONALS LIVING IN
NORTH WALES

OVERVIEW OF NORTH WALES

EU funding has significantly supported both higher and further education in North Wales as elsewhere, and their promotion of employment skills via a suite of bespoke projects; two of the most recent being the SEE (Support for Employers and Employees) project managed regionally by Coleg Cambria; and the 'North Wales Business Academy' project, managed regionally by Grwp Llandrillo Menai. With both projects collectively receiving funding approximately in the region of £20million, there is a significant level of uncertainty as to how this will be replicated in the absence of EU structural funds.

965

EU NATIONALS STUDYING AT
HEI'S IN NORTH WALES

2,215

OTHER NON EU NATIONALS
STUDYING AT HEI'S IN
NORTH WALES

UK universities receive an additional 15 per cent in funding from the EU and some believe the UK could lose this. For Bangor, Wrexham Glyndwr and Chester Universities amongst others, it could also mean academics will struggle to cooperate on research projects. A change in visa arrangements for other European countries may also deter high-calibre academics from joining our universities, particularly at crucial times when economic developments such as Wylfa Newydd offer considerable potential for research, innovation, and development of higher level skills within the region.

The Open University within a recent study on the impact of skills noted how employers were finding it increasingly difficult to recruit staff with the appropriate skills, but also highlighted: "... uncertainty surrounding Brexit was exacerbating the skills gap."

As a result, the survey found that many firms are having to hire temporary staff and pay additional recruitment fees, as well as higher salaries; an approach that many employers within North Wales, particularly within tourism & hospitality, as well as Creative & Digital, are already finding increasingly commonplace.

ESF REGIONAL SKILLS PROJECTS

North Wales plays an active part in the delivery of European Social Funding (ESF) to improve the lives of our residents by learning new skills and finding better jobs. Across Wales, a number of key interventions are in place addressing key challenges to our labour market, tackling unemployment, underemployment, youth employment as well as higher level skills and STEM.



Complementing national delivery are a suite of co-ordinated and tailored investments in North Wales, the majority of which were initiated by, and developed with, the support of the Regional Skills Partnership.



Designed in response to the needs and opportunities of the region via Labour Market Intelligence and employer engagement – this regional approach to delivery ensures a strong synergy between employment demand and supply. This enables the region to address structural weaknesses and imbalances within the labour market, respond to emerging economic opportunities and support the diversification of workforce skills to respond to growth opportunities.

Continued engagement and linkages across and between operations is crucial to ensure success. The region is pro-actively engaged in ensuring regional oversight and join up of activity through a close working relationship with relevant operations through the Regional Skills Partnership and the Regional Engagement Team.



TRAC 11-24 led by Denbighshire County Council



ADTRAC led by Grwp Llandrillo Menai



OPUS led by Conwy County Borough Council



SEE (Support for Employers and Employees) led by Coleg Cambria



North Wales Business Academy led by Grwp Llandrillo Menai

Other ESF skills focused projects operating in North Wales also includes: Active Inclusion (WCVA); Parents, Childcare and Employment 'PaCE' (Welsh Government); ION Leadership (Swansea University with Bangor University); Achieve Through Work Experience (HEFCW); and Communities for Work (Welsh Government).

In addition to the above, a suite of ESF skills & employment projects led on a national basis also operate in North Wales. From health related issues (Welsh Government Healthy Working Wales); Youth Skills & Employment (Welsh Government Traineeships & Apprenticeships and Jobs Growth Wales; HEFCW's Achieve through Work Experience, EES STEM Cymru 2 & Bangor University's KESS 2); Reducing workplace inequalities (SOVA's Achieving Change through Employment and Chwarae Teg's Agile Nation 2) in addition to progressing in-work skills (Cardiff Met and Bangor University's Twenty20 Business Growth Programme & Welsh Government's Progress for Success).

Ensuring the maximum impact of these operations in North Wales is of an utmost priority to us as a region. Through existing regional structures and teams, we are well placed to ensure a strong level of continued engagement and co-operation with national partners to help unblock any barriers or issues in regional delivery - to ensure a strong delivery of outcomes for the people of North Wales.

ENTERPRISE ZONES

ANGLESEY

CENTRE FOR LOW CARBON ENERGY GENERATION THROUGH MAJOR LOW CARBON ENERGY PROJECTS

DEESIDE

HOME TO UK'S HIGHEST CONCENTRATION OF HIGHLY SKILLED, ADVANCED MANUFACTURING JOBS

SNOWDONIA

IDEAL ENVIRONMENT FOR LOW CARBON ENERGY, ICT AND AEROSPACE-RELATED BUSINESSES

The focus of the **Anglesey** Enterprise Zone Board remains driving the island's growth into a world-renowned centre of excellence in low carbon power generation across 10 current key identified sites. It has an existing workforce that has particular strengths in engineering and construction skills, with productivity levels higher than the UK average. During the 15/16 financial year, 99 jobs were created as a result of direct financial support or wider assistance with a further 46 safeguarded. This brings a total to date of 571 jobs created, and 444 safeguarded since 2014.

Grwp Llandrillo Menai at their Llangefni campus have already developed a world-class Energy Centre and Construction Skills Centre which houses low carbon energy technology and training facilities with strong industry links. A new £20million Engineering Centre will further support skills development in preparation for the Wylfa Newydd project, in addition to Bangor University leading the development of the Menai Science Park as well as its existing support and expertise.

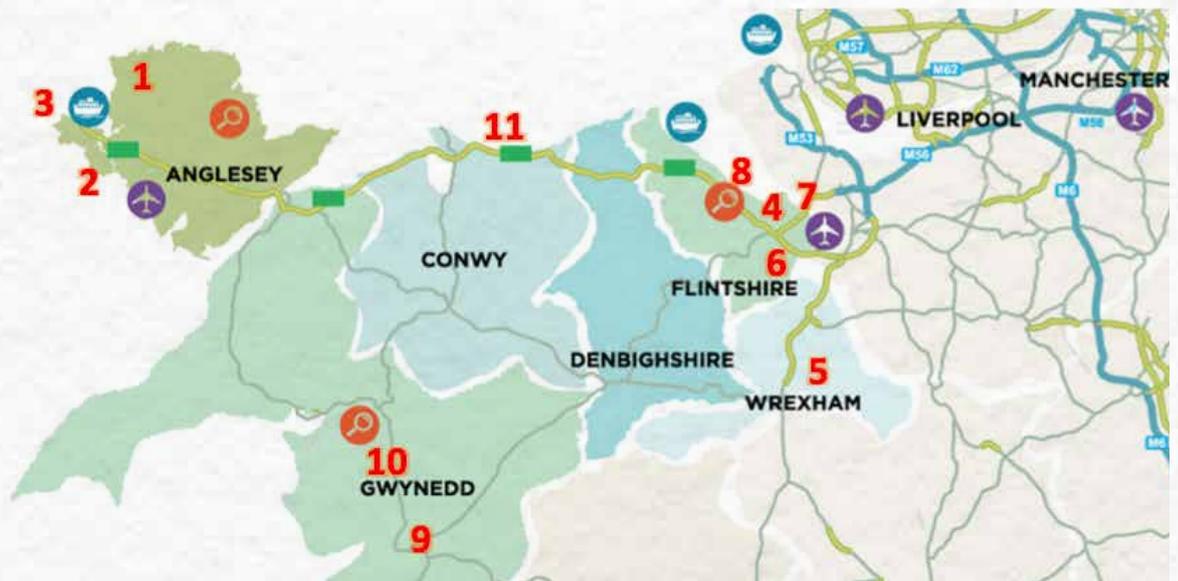
The 2,000-hectare (4,942 acre) **Deeside** Enterprise Zone in North East Wales is home to highly skilled, contemporary manufacturing across a diversity of sectors - from aerospace and automotive to electronics and pharmaceuticals to construction, food and sustainable energy. In terms of skills and labour, it has access to over 2 million people living approximately within a 30-minute commute. During the 15/16 financial year, 784 jobs were created as a result of direct financial support or wider assistance, with a further 176 safeguarded. This bring a total to date of 2,036 jobs created, and 3,150 safeguarded since 2014.

Local academic institutions such as Coleg Cambria & Wrexham Glyndwr University, and the public sector have worked alongside major companies including Airbus, Tata Steel, Toyota and UPM for decades to drive manufacturing skills and expertise within facilities such as the current Advanced Composites Research, Training and Development Centre, and will further do so in the planned Advanced Manufacturing Research Institute led by Coleg Cambria with industry and government partners.

Within the National Park, the **Snowdonia** Enterprise Zone is concentrated over two unique sites tailor-made for low carbon, ICT or aerospace-related businesses. At Trawsfynydd, opportunities include the development potential of a first-of-its-kind Small Modular Reactor (SMR); while at Snowdonia Aerospace Centre, there is potential for dedicated Remotely Piloted Aircraft Systems (RPAS), Maintenance, Repair and Overhaul (MRO) areas within a wider business park, alongside state-of-the-art infrastructure.



As the smaller of the three enterprise zones, it still offers considerable potential, and whilst since 2014 only 6 jobs have been created, with a further 2 safeguarded, it has to be seen relative to the geography and population demographics of the area. Investment has been made at the Snowdonia Aerospace Centre to future proof the airfield for further opportunities now supports 30 full time and 4 part time employees and marks the first phase of site Masterplan delivery on a mixed use basis.



REGIONAL PROJECTS & INVESTMENTS REQUIRING SKILLS

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

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

The combination of employers from our Enterprise Zones, our flagship regional projects, key economic and growth sectors, and our economic backbone of micro businesses and SME's across the region, require an increasing suite of demands in terms of skills and employment that meets their needs and supports ambition and opportunity as part of the proposals for a North Wales Growth Bid.

As part of the demand analysis undertaken by the Regional Skills Partnership for North Wales, we are keen to identify how we upskill the current workforce to address and reduce issues such as in-work poverty; but also to work with partners collectively to influence and improve access to skills via improved infrastructure and transport, to meet demands, as promoted by 'Growth Track 360'.

The challenge for demand in North Wales is how we address a workforce gap in the region, more so potentially than a skills gap....

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

Our analysis in tandem with the work on the Growth Bid for North Wales and acknowledging work on National Occupational Standards, underlines the relationship of skilled workers to innovation and economic performance. Should the Growth Bid be successful, we will need further people within our workforce regionally, who have the skills that businesses in North Wales and our cross-border areas demand, including key skills around 3D printing and data creation, whose technology demands will affect many sectors, yet currently is already part of a regional technical skills shortage.

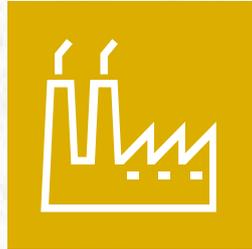
Demands if they are to be effectively met, will require vocational as well as traditional academic education, so we need to further build on our influence and relationships across schools, further and higher education, as well as trade unions and work based learning providers; and promoting the cross-relationships via the mechanism of the Regional Skills Partnership, to collectively and appropriately respond to employers' demands on the current and future supply of skills and labour.



KEY SECTORS



ENERGY & ENVIRONMENT

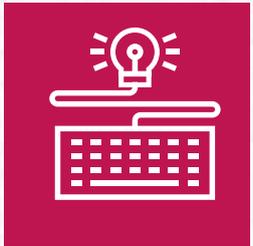


ADVANCED MANUFACTURING & MATERIALS



CONSTRUCTION

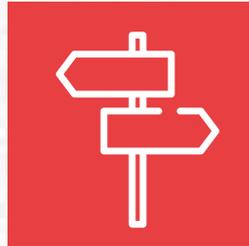
GROWTH SECTORS



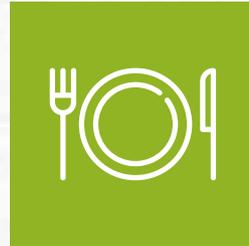
CREATIVE & DIGITAL



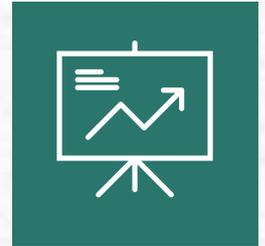
HEALTH & SOCIAL CARE



TOURISM & HOSPITALITY



FOOD & DRINK MANUFACTURING



FINANCIAL & PROFESSIONAL SERVICES

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



Prince's Trust
Cymru

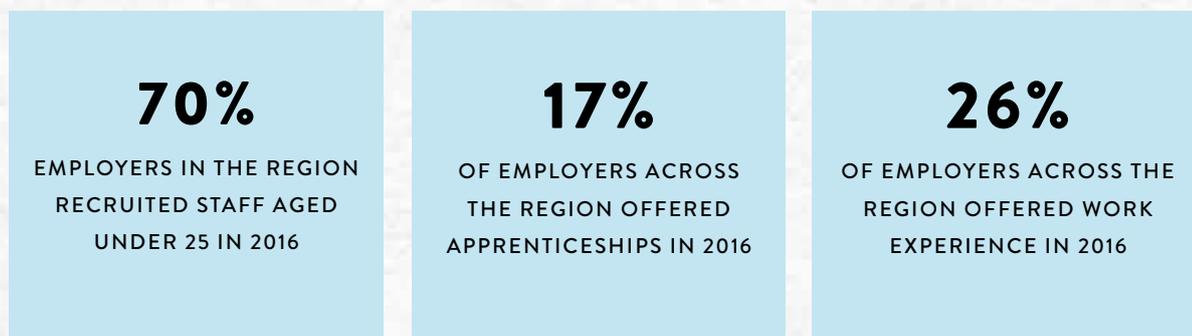
We are determined to increase our visibility and presence through partnership working as we double our staff resource in the North, delivering for example, "Get into", our sector specific employability programme across the Construction, Rail, Customer Services and Care sectors in North Wales. We want to build on this, based on local and regional opportunities and priorities to include Hospitality, Tourism, Manufacturing, Rail Engineering, Security and Digital. We would like to continue to work collaboratively with NWEAB as the Regional Skills Partnership for North Wales as we have done already, (supporting people into work during the construction of HMP Berwyn at Wrexham), to further identify and map employment prospects and opportunities for young people across North Wales so that we can focus our efforts with the support of the RSP in these key sectors.

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

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

One possible solution to meet demands from employers, and promote the development of appropriate skills, is proposed within the North Wales Growth Bid with a suggested dedicated skills fund within the region to promote and support those currently in low paid employment, but with higher level qualifications and aspirations. A key focus would be on higher level degree apprenticeships, and the formation of a bursary to support access to in-work training.

The proposed skills fund for the region would help those currently within employment obtain financial support dedicated to additional training and development, to enable them to then move into higher skilled roles in opportunities across our key and growth sectors. This approach if successful, will support retention, reduce in-work poverty, meet demands for appropriate skills from employers, and further incentivise those at risk of displacement and vulnerable groups.



The region has already begun work on a North Wales Employability Toolkit to complement and support the national Employability Plan from Welsh Government, and this will help address the needs of employers across our six counties, as well as mirroring the needs of those cross-border.

Meeting and responding to demands for an improved integrated and coordinated approach to careers advice and guidance is an aspiration mirrored within the North Wales Growth Bid. The proposal builds on the existing support from Careers Wales and its aspirations presented in its recent "Changing Lives – A Vision for Careers Wales 2017-20" document published earlier in 2017.



In North Wales, we see this as Careers Wales working as part of an integrated service approach alongside DWP, HE & FE partners, and appropriate employer representatives from both sides of the border, to identify and address demands to offer bespoke regional careers advice; promoting appropriate and tailored work placements and experience; and that it focuses on all-ages in order to support job seekers, as well as inspiring ambition amongst young people to work in our key and growth sectors.

To both attract and retain skills within the region to meet employer demands, we must also do more in North Wales to promote the wider social dimension around social cohesion and social capital - as this is also critical. In addition to monitoring and championing the quality of the jobs being created (removing a potential increasing reliance on the 'gig' economy), we need to also focus on the promotion and alignment of the quality of public services in the region - education, health, housing, transport, culture and welfare. In a more competitive demand climate between regions to attract and retain talent, North Wales has considerably more to offer than others with an unrivalled quality of life for workers and their families, as this wider socio-economic package, is an increasingly important factor to helping meet skills demands.

COMPUTING & TECHNICAL	INFLUENCE	What were once perceived as advanced skills from employers as displayed, are becoming increasingly part of the mainstream skills by employers in North Wales. The cross cutting themes of awareness and qualification within STEM subjects, numeracy & literacy, and general awareness of appropriate conduct and presentation within a workplace environment are all areas which employers are placing further relevance upon when considering appointments of staff in all key and growth sectors.
MARKETING	PRODUCT	

Working with Welsh Government and the Skills Gateway for example on promoting the provision of skills appropriate to sector and regional demands will be critical, and avoiding displacement from rural and cross-border communities will be key to our success as a region in meeting demands to remain in line with measurements promoted within the Well-Being of Future Generations Act.

The issue of replacement demand is potentially the largest challenge and demand upon the region. Predictions of the roles needing to be replaced in the next 5-10 years across North Wales, will mean that a planned replacement demand programme for skills is needed. Partners within the Regional Skills Partnership need to champion this coordinated collective approach and work with existing mechanisms such as the All Age Employability Programme, and Skills Priorities Programme, to put local and regional knowledge on demands, particularly aligned to the promotion of Welsh language skills, to best effect across North Wales.

UP TO
34%
REPLACEMENT DEMAND FOR SKILLED TRADES IN ENERGY & ENVIRONMENT NEEDED BETWEEN NOW & 2024 IN NORTH WALES

UP TO
30%
REPLACEMENT DEMAND FOR SKILLED TRADES IN ADVANCED MANUFACTURING NEEDED BETWEEN NOW & 2024 IN NORTH WALES

UP TO
34%
REPLACEMENT DEMAND FOR SKILLED TRADES IN CONSTRUCTION NEEDED BETWEEN NOW & 2024 IN NORTH WALES

DEMAND KEY SECTOR: ENERGY & ENVIRONMENT

The energy and environment sector is a key employer within North Wales, and therefore identified as one of the three key sectors in terms of skills and employment, within this Plan.

The energy cluster is a key driver and as it continues to expand, will both need and have expertise around energy generation, low carbon technologies and processes, with businesses well-equipped to exploit opportunities as a result of investment in Wylfa Newydd, Trawsfynydd Small Modular Reactors, off-shore wind, biomass and tidal energy projects. We will see businesses within the cluster be able to utilise the developing suite of centres of excellence from the Menai Science Park and Energy & Engineering Centres on Anglesey, to the AMRI at Deeside and extending cross border to facilities within the Thornton Science Park, and wider Cheshire Science Corridor, to further promote current & future skills and expertise within the region.

Synergies with energy sector cluster development activity in neighbouring regions will be fully exploited, especially supply chain opportunities. North Wales, together with the cross-border area and North West England, will be positioned as one of the leading UK locations for energy generation and energy related supply chain investment, with expertise in business and academia to seize opportunities for the global demand for low or zero carbon energy.

North Wales Growth Vision (July 2016)

16,789

PEOPLE EMPLOYED IN
SPECIALIST ENERGY AND
ENVIRONMENT BUSINESSES
ACROSS NORTH WALES

850

ESTIMATED DIRECT
OPERATIONAL JOBS TO BE
CREATED AT WYLFA NEWYDD
PROJECT

£1billion

COULD BE THE VALUE OF
POTENTIAL WAVE, TIDAL AND
MARINE PROJECTS ACROSS
NORTH WALES

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

This will also help us to align our future aspirations and ambitions for the sector in North Wales to the Welsh Government Green Growth Agenda. As a response to the Well-being of Future Generations (Wales) Act, the development of this key sector in the region, will see us promote and develop our workforce and building skills, and fairly distribute the proceeds of economic growth and project development that tackles poverty whilst trying to prevent costly climate change and unsustainable use of natural resources where feasible.



FUTURE SKILLS DEMANDS FOR NUCLEAR OPERATION



The impact of the £12billion Wylfa Newydd project on the skills base on wider supply chain across North Wales should not be underestimated, with a need for experience to deliver and apply upto 270,000m³ of concrete, 100km of piping, and 70,000ft of reinforcing bar in addition to a wide range of support across all sectors.

In addition to the promotion and identification of future skills and recruitment via existing partnerships primarily with Grwp Llandrillo Menai and Bangor University, Horizon Nuclear Power is also looking at several routes into employment to meet demand. Working with the RSP in North Wales and DWP, these include those looking to change careers; those undergoing resettlement from the armed forces; current nuclear experienced staff from decommissioned Trawsfynydd and Wylfa sites; and those currently economically inactive and looking to re-enter employment.

Locally, the labour market in Anglesey however, does not have the sufficient numbers in terms of supply, to meet the demand of the project once it commences. Whilst, local and regional partners are supportive of promoting the opportunities to the islands current and emerging labour market, the wider region will also need to have a key role in supplying the appropriate skills needed to meet the specific demands this project will entail, not only for the direct on-site workforce, but also for the wider regional supply chain who may need additional skills via formal accreditation(s) to engage with this type of project.

Current skills shortages within the nuclear sector, are based around competencies including high-level problem solving and strategic management

The greater general concerns in meeting the skill demands of the nuclear and wider energy sector generally, are associated with the STEM specific based technical qualifications and expertise which can be traced back to declining numbers in these subject areas within our schools.

Other projects demanding skills within this sector around North West Wales include the £1billion ORTHIOS development, which will deliver upto 700 jobs once operational, and deliver 299mw of energy created through a Biomass plant and a combined food and power facility (aquaponics and hydroponics) to power upto 300,000 homes.

DEMAND KEY SECTOR: ENERGY & ENVIRONMENT

In Flintshire, the £600million Parc Adfer energy recovery facility is due to commence groundworks in 2017 and forecast to be operational in 2019 with a requirement for 300 workers during construction, and 35 plant operators once operational.

In Gwynedd there are proposals for a £1billion Small Modular Reactor to be built near the current Trawsfynydd site which could be operational by 2030. Current estimates propose upto 800 jobs during the construction phase, and 365 once operational, bringing high value jobs to Meirionydd, which is currently a poorly performing and low wage local economic area.

Forecasting intelligence for North Wales shows changing occupational composition in the energy and environment sector up to 2024. It is predicted that there will be a considerable increase in demand for high level occupations, such as managers, professionals and associate professionals, whilst skilled trades occupations continue to have a large share of employment. However, with increases in automation and use of technology, there is decrease forecast in the number of jobs associated with process, plant and machine operatives, but there is still a need to replace current labour with 32% new entrants needed in this area specifically to mitigate retirees and others leaving the sector.

+23% INCREASE NEEDED IN PROFESSIONAL OCCUPATIONS WITHIN THE SECTOR UP TO 2024	+20% INCREASE NEEDED IN ASSOCIATE PROF. AND TECHNICAL OCCUPATIONS WITHIN SECTOR UP TO 2024	+6.3% INCREASE NEEDED IN SKILLED TRADE OCCUPATIONS WITHIN THE SECTOR UP TO 2024	-2.5% DECREASE FORECAST IN PROCESS, PLANT & MACHINE OPERATIVES WITHIN THE SECTOR UP TO 2024
39%	36%	34%	33%

REPLACEMENT DEMAND

The general replacement demand for key employment roles across the sector between now and 2024 includes replacement staffing for those who leave the sector, and also provides evidence of where future apprenticeships, work placements, and traineeships need to be focused within the Energy and Environment sector across North Wales if we are to meet sector skills demands, via our current and future domiciled labour market.



I have a passion for engineering and finally being able to put this to use has been amazing. Being part of the Wylfa Newydd project is an exciting opportunity as I'll get to see the power station through all the stages of development, and I'll get to work there when it's complete!

Nia, Aged 17 - Horizon Nuclear Apprentice With GLLM



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

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

The advanced manufacturing cluster in the region remains one of our flagship sectors in terms of higher level skills, and collectively remains highly competitive on the global stage. The Growth Vision document for North Wales notes how

“...the region will be a hot-bed of activities in this cluster, building on a strong network of anchor companies with international profile and a competitive edge in aerospace, materials and processes, marine and environmental engineering, automotive, electronics and food.”

North Wales Growth Vision (July 2016)

Anchor companies in this cluster are already supplied by SME's within the region with a reputation for quality, and a labour market of high and definitive skills. As these skills continue to evolve through both planned training, and addressing of gaps, the cluster will also benefit in the future from a portfolio of well serviced development sites as well as the availability of applied knowledge assets and facilities, especially in both higher and further education.

Growth in this cluster and the skills it requires will be driven in particular by Enterprise Zones (such as Deeside Enterprise Zone), as well as new investment in the Northern Gateway, Deeside; Wrexham Industrial Park; St. Asaph Business Park; Parc Bryn Cegin, Bangor; and Parc Cybi, Holyhead. It is these beneficiary sites and the expansion of businesses here which will require additional skills to support inter-related employment opportunities within supply chain and associated service provision industries.

740

BUSINESSES CURRENTLY OPERATIONAL WITHIN THIS SECTOR ACROSS NORTH WALES

34%

OF ALL PEOPLE EMPLOYED WITHIN THIS SECTOR ACROSS WALES ARE EMPLOYED IN NORTH WALES

£30m

INVESTMENT IN NEW ADVANCED MANUFACTURING & RESEARCH INSTITUTE AT DEESIDE

DEMAND KEY SECTOR: ADVANCED MATERIALS & MANUFACTURING

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

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

Skills shortages are more of an issue, rather than a skills gap within the current workforce of this sector generally across North Wales

Looking ahead to future skills requirements across the Manufacturing sector, with increased potential for additional technologies to increase productivity and further automation, there is an expectation that in North Wales we will require further personnel in professional and associate professional roles. This will potentially be at a higher volume than those required within skilled trades within the sector due to the advance of new technologies.

Senior staff within the sector will require further support around skills that focus on innovation and commercialisation. This will be in addition to existing skills within the sector which receive strong weightings of importance from employers and staff around the need generally for project management, marketing and influential skills.

The recent introduction in Wales of the new Mastercrafts person Diploma in Engineering, is a higher level apprenticeship which will hopefully attract and support the creation of additional new engineers, as well as supporting those already within the workplace, to help address a current forecast shortfall in this key cohort.



Developed by the Deeside Enterprise Zone Advisory Board, AMRC Sheffield, Swansea University, and Coleg Cambria, in conjunction with SMEs and large companies, the new proposed Advanced Manufacturing & Research Institute at Deeside will focus on research into and development of advanced manufacturing techniques and production processes for advanced manufacturing sectors including aerospace, automotive, nuclear and food. It will also address training and skills needs across industry supporting key manufacturing companies as well as multi-sector supply chain companies and the broader SMEs economy within Deeside, North Wales, the Northern Powerhouse and further afield.



930

HE STUDENTS ON
ENGINEERING,
TECHNOLOGY &
MANUFACTURING COURSES
IN REGION

Across Higher Education within North Wales there were 930 students studying towards qualifications based within subject areas associated with manufacturing, engineering and technology. This included in 2015/16, 240 people who were studying at Bangor University on a course related to these areas which is an increase on the 204 recorded in 2014-15. Wrexham Glyndwr had 690 students within the same cluster of subjects, studying both full and part-time.

5,885

FE STUDENTS ON
ENGINEERING,
TECHNOLOGY &
MANUFACTURING
COURSES IN REGION

Within Further Education, there were 5,885 learning activities relating to engineering and manufacturing technologies in further education in North Wales during 2015-16. These can be broken down to show that 30 of which were at entry level, 625 at level 1, 3,125 at level 2, 1,850 at level 3, and 35 at level 4.

The majority of these learning activities, 3,080, were in engineering; 1,495 were in manufacturing technologies, and 1,305 in transportation operations and maintenance.

1,275

APPRENTICES WITHIN
MANUFACTURING AND
ENGINEERING IN NORTH
WALES IN 2016

There were 365 manufacturing apprenticeship programmes in North Wales during 2015-16, and 910 engineering based apprenticeship programmes in the same period.

Within manufacturing, this was a decrease on the 410 total recorded for 2014-15. However, whilst there as a decrease in Level 2 for 2015-16, there was an increase level 3 from 50 to 75 apprenticeships.

Of the 910 apprenticeships recorded for engineering, this includes 370 at Level 3, and 20 at Level 4 and above, both within 'Engineering Manufacturing'.

Within Anglesey the repair and maintenance of aircraft subsector employs 600 people, and the manufacture of metal structures and parts of structures currently employs 125 people – an increase on the 75 figure in 2014. In Gwynedd, 100 people are employed for the manufacture of instruments and appliances for measuring, testing and navigation. This is an increase from the 20 people it employed in 2012.

In Conwy, 225 people are employed in the manufacture of metal structures and parts of structures, and the manufacture of lifting and handling equipment. This is an increase from the 100 people employed in 2012.

DEMAND KEY SECTOR: ADVANCED MATERIALS & MANUFACTURING

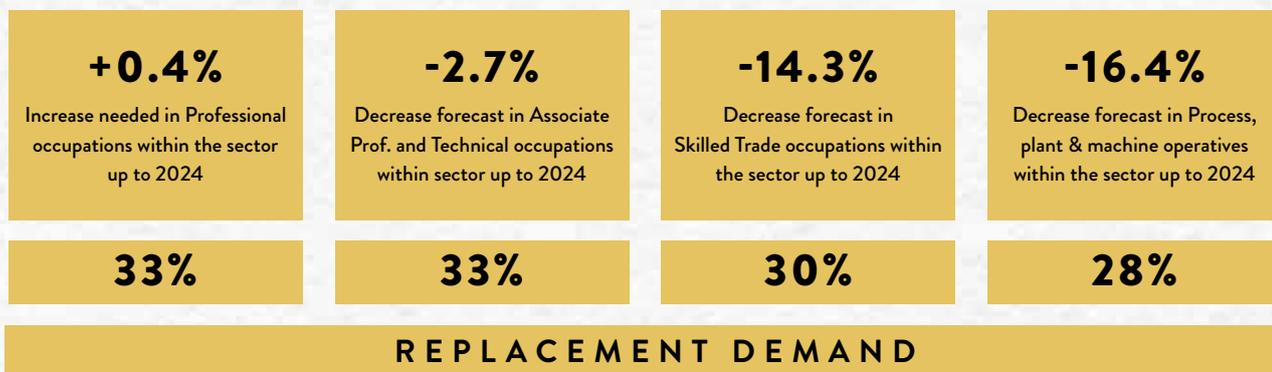
In Denbighshire, the strength of the optoelectronics sector is evident with the manufacture of optical instruments and photographic equipment subsector employing 500 people; an increase from 400 people in 2012. The OpTIC Centre is an important hub for the optoelectronics industry in the region and includes business incubation units in close proximity to employers such as Dyesol UK Ltd, Laser Micromachining Ltd, Qioptiq, Acuity Products Ltd, Fibrespeed, and Kent Periscopes.

Both Flintshire and Wrexham see the benefits of having 6,000 employees at Airbus in Broughton, with a cluster of companies in related sub-sectors in close proximity including Aerotech, Electroimpact UK and Gardner Aerospace in Flintshire, and companies such as Trittech Group, Cytec Aerospace Materials and Magellan Aerospace in Wrexham.

The manufacture of other parts and accessories for motor vehicles employs at least 800 people in Wrexham at companies including Alunox Exhaust Systems, Applied Components Technology Ltd, Isringhausen GB Ltd and JCB Transmissions. Whilst in Flintshire, a combined figure of over 700 for both the manufacture of other parts and accessories in addition to the actual manufacture of motor vehicles see skilled labour employed at companies including Rhino Products Ltd, TI Automotive Systems Ltd, and Toyota Motor Manufacturing UK.

Forecasting intelligence for North Wales shows changing occupational composition in the advanced materials and manufacturing sector up to 2024. It is predicted that there will be a considerable increase in demand for higher level occupations, including professional and technical roles whilst skilled trades and process operatives will see the increasing automation and use of technology, necessitate a forecast decrease in roles required.

However, there will still a need to replace current skills and labour still required as people leave the sector through retirement and other means; therefore whilst for example between now and 2024 a forecast decrease in plant and machine operatives of -16.4% is estimated, we still need to replace upto 28% of staff within this area of work during the same timeframe, which equates to a total requirement balancing the decrease and replacement forecast, of 11.9% in new occupations.





The general replacement demand for key employment roles across the sector between now and 2024 includes replacement staffing for those who leave the sector, and also provides evidence of where future apprenticeships, work placements, and traineeships need to be focused within the AM&M sector across North Wales if we are to meet sector skills demands, via our current and future domiciled labour market.

One of the main challenges for this sector in terms of skills demands, is to raise awareness of the future job and employment opportunities that will exist for young people generally – particularly through apprenticeships. This should also be seen as a route to encourage more females via STEM subjects into this sector to build greater gender diversity and equality in a currently very male dominated sector (same principle as both Energy & Construction key sectors).



Airbus continues to be proud of its workforce here in Broughton on Deeside, and values the role of partners in supporting our continued skills developments. In 2016 at Broughton, we took on almost 100 apprentices in craft, technical, and graduate roles, and our intention is to recruit a further 100+ apprentices across different disciplines in 2017. The engagement with our supply chains regionally and their skilled labour is increasingly important for us, and we welcome the opportunity to engage with other partners via the Regional Skills Partnership in North Wales as we look to develop a new STEM academy to further enhance and promote the skills we need for the future."

Gavin Jones, Head Of Early Careers Programmes - Airbus



If I had pursued a military career I would not have achieved the awards and recognition that I have received. I am now classed as one of the best engineers in the UK and Europe and this is through support from Coleg Cambria staff, my assessor and my employer, Electroimpact. I am looking forward to competing in WorldSkills in Abu Dhabi in October and this is all due to my apprenticeship and college experience.

Ethan Davies, Level 4 NVQ In CNC Machining, Electroimpact

The construction sector remains one of our flagship sectors in terms of skills, in that it has an impact on, and is also closely influenced by other sectors across North Wales, as construction output continues to grow, driven currently by expansion in the private sector housing and commercial sectors. Recent flagship projects such as the build of HMP Berwyn in Wrexham, has focused a renewed emphasis on collaboration amongst providers and employers to promote the skills and employment pathways available within the sector across North Wales to great effect.

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

These front-line roles and responsibilities are also supported by other functions within the sector around administration, project management, procurement, legal, finance, surveying, marketing, education, community engagement, and others, which often can be overlooked, but also form an intrinsic part of the wider construction sector in North Wales and beyond.



Using data from Stats Wales and the Business Register and Employment Survey (BRES) we can report that 20,500 are now estimated to be employed within this sector (2015 data). This continues the increase reported in last year's Skills Plan when 16,100 (2014 data) were employed, and builds on the 2013 figure of 13,800.

Employment growth in the sector according to CITB Wales within the Construction Skills Network 2017 Forecast, predicts that a high productivity growth rate forecast will be largely due to growth being centred in the low labour intensive infrastructure sector; covering large projects such as Wylfa Newydd. Whilst Wales is projected to see annual average output growth of 6.2% over the five years to 2021, the figure will be higher in North Wales due to the impact of Wylfa Newydd.

Challenge for the sector in North Wales remains around raising awareness with young people and particularly females, the breadth of opportunities that exist in the sector. This will help change perceptions of the sector, and address future skills gaps around technical and specialised skills.



Flintshire had the highest number of registered construction businesses out of the counties, at 685 local units in 2015, followed by Gwynedd at 670. Wrexham had 545 local units, Conwy 470, and Denbighshire 460. Anglesey had the smallest share of construction businesses at 340.

The biggest increases in the number of local units in Construction from 2013 to 2015 were in Gwynedd and Denbighshire (both increased by 40 local units). The number of local units in Flintshire rose by 30 from 2013 to 2015, while Wrexham increased by 25. The smallest growth was seen in Conwy and Anglesey; the number of local units in Construction in Conwy increased by 10, while Anglesey increased by only 5. However, when using comparative analysis effectively, with issues around demography density and economic drivers, 5 new businesses in Anglesey, can be the equivalent to 25 in Flintshire in proportional terms.

13%
IS MINIMUM INCREASE IN
BRICKLAYERS REQUIRED
WITHIN NORTH WALES BY
2022

12%
IS MINIMUM INCREASE FOR
PAINTERS & DECORATORS
REQUIRED WITHIN NORTH
WALES BY 2022

7%
IS MINIMUM INCREASE FOR
CIVIL ENGINEERS REQUIRED
WITHIN NORTH WALES BY 2022

In addition to the skills demands highlighted above for the sector in North Wales there are also forecasted needs to recruit and train additional individuals to be 'Process Managers (+12.16%); 'Plant Operatives' (+9.94%); 'Surveyors' (+6.34%); 'Electrical trades & installation' (+5.46%); and 'Wood trades' (+4.21%).

With the potential for a peak of 8,500-9,000 construction workers at Wylfa Newydd in 2023-24, it is clear that the current construction workforce within Anglesey, if all left their current roles, would only be able to service a fifth of the potential positions available.

Working with wider regional partners, we need to extend the opportunities to the wider region, to realistically meet demands, and prepare for issues of inevitable displacement from existing employers and projects within the sector across North Wales.

Wylfa Peak Workforce by Project Stage	
Power Station Site (Construction)	8,050
Off-site Facilities (Construction)	45
Power Station (Operational)	425
Site Campus Facilities (Operational)	425
Park & Ride Facilities (Operational)	20
Logistics Centre Facilities (Operational)	35
TOTAL	9,000

Wylfa Peak Workforce by Job Type	
Site Services, Clerical & Security	500
Managerial & Supervisory	1,975
Civils Technicians	3,050
Mechanical & Electrical technicians	2,670
Power station operational staff	425
Off site services, security & clericals	380
TOTAL	9,000

DEMAND KEY SECTOR: CONSTRUCTION

It is expected that as part of the construction phase for Wylfa Newydd, we will see additional demands within the supply chain, and therefore the need for further apprenticeships in applicable trades and sub-sectors. Currently estimated to be at Levels 2 and 3, apprentices could progress to higher level apprenticeships in specific specialisms aligned to the longer build time due to the project scale and duration.

Horizon Nuclear with its joint venture partner, Menter Newydd, are committed to working with local and regional businesses to help promote the supply chain and skills demands required by the project, so that local parties can prepare and work collectively where feasible, to benefit from the considerable opportunities a project of this size and scale will deliver.

The construction offers of both Grwp Llandrillo Menai and Coleg Cambria working together, alongside CITB, are a key deliverable as part of a regional response for the support required for Wylfa Newydd. The combination of expertise and facilities via examples such as the new Construction Centre at Bersham in Wrexham with Cambria, and the continued investment in the campus at Llangefni by GLLM to create centres of excellence, will clearly demonstrate the regional preparation to meeting future demands, by promoting and preparing the skills required.

1,035

construction apprenticeship programmes in North Wales in 2016 on engineering, technology & manufacturing courses in region

In 2015/16 we have seen an increase in the total of construction-related programmes in North Wales to 1,035; aided by increased awareness of opportunities within the sector being communicated and promoted by employers and providers, with flagship projects such as HMP Berwyn in Wrexham being a beacon for the industry in North Wales, supported by sector bodies such as CITB Wales and ECITB.

5,885

FE students on engineering, technology & manufacturing courses in region

During 2015/16 in North Wales we have seen 550 students study for an apprenticeship in this sector at a Level 2, covering areas such as general and specialist construction; civil engineering; and heating and plumbing. The 485 students who studied at Level 3, covered the same areas, and in addition, technical and professional construction; electrotechnical; and heating and ventilation.

For those domiciled in North Wales and studying a construction related course in Further Education, the latest figures for 2015/16 show an increase on the previous year. In 2014/15, there were 4,790 North Wales domiciled students studying construction, and in 2015/16, this rose to 4,850.

1,275

Apprentices within manufacturing and engineering in North Wales in 2016

With a concentration of smaller micro businesses and employers in this sector in North West Wales particularly where we already see 4,700 employees in Gwynedd, 3,100 in Conwy and 2,000 in Anglesey, 800 learning activities in 2015/16 for construction were delivered bilingually (approx. 18% of all provision).



Proximity of apprentices to future employment opportunities such as Wylfa Newydd is key to promoting and retaining skills within North Wales. Comparative figures for construction apprentices across North Wales show that for those domiciled in each of the other six counties within the region for 2015/16, Anglesey had 55 (30 at Level 2, and 25 at Level 3); Gwynedd had 110 (70 at Level 2 and 40 at Level 3); Conwy had 65 (40 at Level 2, and 25 at Level 3); Denbighshire had 55 (35 at Level 2 and 20 at Level 3); Flintshire had 80 (50 at Level 2 and 30 at Level 3); and Wrexham had 100 domiciled construction apprentices (60 at Level 2, and 40 at Level 3).

There are examples of employers across North Wales who are supportive of apprenticeships within the sector. Ranging from large companies such as ANWYL where about 20% of their current workforce started as apprentices; to smaller locally focused businesses who help promote and develop local skills. Examples of some of the other employers within the sector across North Wales who are promoting and supporting apprenticeships within the region include:

Jones Bros. / Owens Building & Roofing Ltd / Pro-Build / AK Developments / & Wynne Construction.

However, if the sector is to continue to evolve in light of an aging workforce, displacement due to large scale projects, and aiming to contribute to the Welsh Government target of 100,000 new all age apprenticeships, we need to build and learn on existing best practice with delivery partners at a local level. We need to take the best practice from the RSP & DWP led skills brokerage service at HMP Berwyn which assisted the development of 100 new apprenticeships, and extend & promote to other projects and smaller employers in rural areas.

Coleg Cambria will see in Autumn 2017, the opening of its new Engineering Centre at Bersham Road in Wrexham which will house new facilities for construction students. The new centre forms part of an £8.5million redevelopment of the site which will see the additional refurbishment of the existing construction, welding, and motor vehicle workshops.



Bersham Road Development (Artist impression)



Llangefni Engineering Centre (Artist impression)

Developing a local skills base is vital if we are to capitalise on the employment opportunities currently being created ... It is a huge vote of confidence in young people across north Wales and ensures they have the opportunity to train in a state-of-the-art environment to prepare for an exciting career at Wylfa Newydd, or one of the other large-scale infrastructure projects planned

Alun Davies, Minister For Lifelong Learning & Welsh Language (15 December 2016)

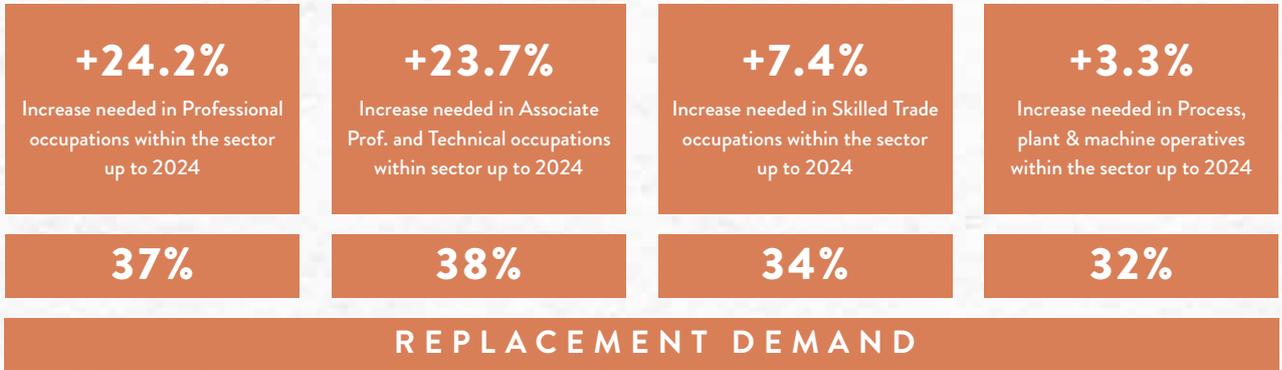
The North Wales Construction Framework since 2014, has provided a cost-effective mechanism to secure contractors to build new schools and other public buildings as well as delivering benefits for local sub-contracting businesses and communities. To date it has promoted more than 7,800 hours of work experience, 29 permanent new jobs created for unemployed people, 8,800 pupils involved in engagement events and 30 work placements for NEETs (individuals not in Employment, Education or Training) in partnership with The Prince's Trust.

Wales's ARR [Annual Recruitment Requirement] is estimated at 3,890, the fifth largest requirement on an absolute level, and the highest as a ratio of base 2017 employment (3.4%). This is well above the UK ratio of 1.4%. Whilst Wales in general traditionally suffers from high net outflows of its construction workforce to other areas of the UK, in North Wales the majority of any outflows are to the North West of England and the Midlands.

A 2015 CITB study reported that 88% of Welsh construction employers in the repair and maintenance sub-sector in North Wales work in relation to both modern and traditional (pre-1919) buildings. Moreover, 49% expected work on traditional buildings to increase. Yet according to CADW, there is a significant scarcity of training provision in traditional building skills and knowledge.



However, with the combination of a series of largescale construction projects in the next 5-10 years increasing demand for skills, and an aging existing labour market within the sector, there are considerable challenges to replace and grow skills in key sub-sectors and at different levels of ability and expertise.



Watkin Jones Group dedicate time and resource into promoting careers in construction, and have strong links with local schools, colleges and universities, demonstrated through the Watkin Jones Group Construction Scholarship Programme in association with Grwp Llandrillo Menai, which has been running for over 10 years now. Quantity Surveying is a key role within our business and one which we are keen to develop from trainee level. However, there are no specific quantity surveying courses in North Wales currently which is a concern for us and a barrier to developing these students skills.

Corina Lewis - Training & Development Manager



When I started the apprenticeship I was at the company training centre for 5 weeks before going on site. I have now just completed a two-month training block where I gained all my tickets for the different machines. I will now be going out on site to gain the experience needed to complete my apprenticeship framework. Through this job, I enjoy meeting new people, working away, learning new skills, driving different machinery and the money is good!

Conah Astbury - Apprentice Plant Operator, Jones Bros.



The creative and digital sector is an innovative growth sector employer within North Wales, and therefore is continued to be recognised as such within the Plan, as it also correlates to the nine Welsh Government priority sectors nationally.

Recognised as one of the fastest growing sectors in North Wales, it supports wealth and job creation through the generation and exploitation of intellectual property. It is a sector based on individual creativity, skill and talent.

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

10,800

JOB
SUPPORTED BY THE
SECTOR ACROSS NORTH
WALES

£711

AVERAGE WEEKLY EARNINGS
WITHIN THE SECTOR IN
NORTH WALES

1,160

ENTERPRISES OPERATIONAL
ACROSS THE SECTOR IN
NORTH WALES

The North Wales Growth Vision document (July 2016) notes in reference to the Digital arm of this diverse sector cluster specifically, that:

The diverse digital sector, including high performance computing, data analytics, media, cognitive computation etc., will be pivotal to the region, forging new innovative sectors and creating new ways to doing business

North Wales already has an increasing number of companies specifically supporting the wider digital economy with expertise within digital intelligence from industry software and innovation, to video games development. Our proximity and increasing working links and sharing of skills across the border with video games development clusters in Liverpool, and broader innovative media at Salford, further demonstrates the connectivity cross-border the industry in North Wales continues to develop and promote as part of our international offer of skills to wider world markets and employers.

The Creative & Digital sector in North Wales produces talented individuals with transferable skills that benefit both our creative industries, and those more established sectors highlighted elsewhere in the Plan.



Flintshire and Gwynedd are amongst the top 5 'hot spots' in Wales for creative industries locations. This is certainly in part due to the work of both our HEI's and FEI's in the region, and key anchors in terms of centres of excellence with Theatr Clwyd in Mold, and the Galeri in Caernarfon.

The challenge for North Wales in an increasingly competitive market for these component sectors within Creative & Digital, is to develop and promote the skills and creativity of all young people in the region, but also identify and encourage those who are more able and talented. They should be then championed by supply chain employers and businesses of the sector, who support and help the continued growth of this cluster within the region.

As Welsh Government notes within its December 2016 publication, 'A Vision for Culture in Wales':

Mobile phones, webcams and computer software have democratized the means of production. Now, everyone is a potential author, musician or filmmaker. Technology is getting smaller, cheaper, more powerful, and more personal; it is changing how we consume content, and offering new ways for exchanging views, ideas and content.

The challenge for North Wales is to support, promote, and retain the skills of an increasingly instantaneous and technologically adept future and current labour market across this broad sector; promoting interconnectivity between its components, to deliver a broader contribution to the umbrella sector heading of 'Creative & Digital' for skills in North Wales.



Support for training and education aligned to the needs of business and the digital and creative economy in North Wales will be key to its future growth and development. Using sector ambassadors from within the region as well as outside, to promote opportunities around skills and career pathways will be key.

Within North Wales at both Bangor and Wrexham Glyndwr Universities, we have 1,535 students in 2015-16 who were studying towards under and post graduate qualifications in a combination of 'Creative Arts & Design', and also 'Computer Science' based courses; representing an increase cumulatively on the previous academic year. The challenge is to identify the employment opportunities to harness these skills, and retain and develop them with employers within the sector across the region.

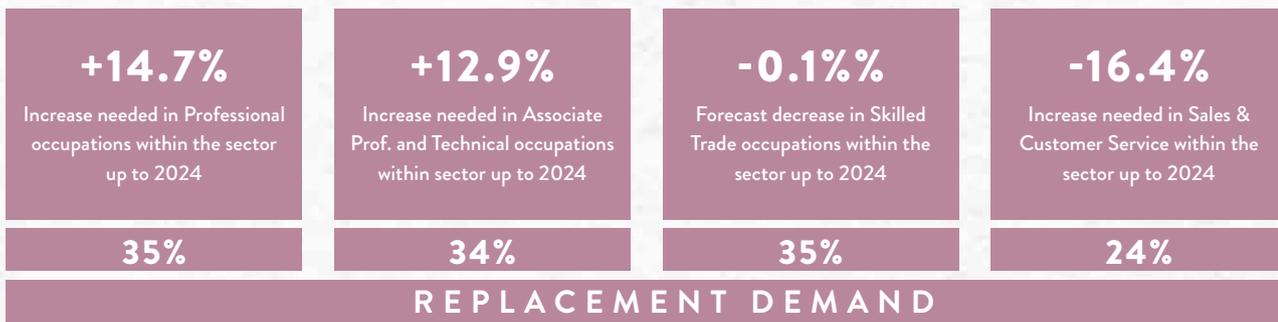
The sector in North Wales is ideally placed strategically and geographically to meet increasing demands with the further development of a creative cluster and network using key flagship projects, and increasing the skills competencies and developments within the appropriate sub-sectors.

DEMAND GROWTH SECTOR: CREATIVE & DIGITAL

The former C6 network has now developed further to meet the growing needs of the sector by becoming “Gogledd Creadigol / Creative North Wales”; and will be the body that aims to represent the voice of the creative and digital sector across the region. It aims to achieve this by lobbying policy makers; promoting collaboration via the sharing of good practice; and identifying the regions skills and training needs for the sector(s).

Within the region, we already see clear evidence of employers beginning to cluster in some of our strategic sites across North Wales. This will further help the development and promotion of skills as it will provide a focus for employment activities and gender equality in the digital sector, in locations such as the Menai Science Park, Wrexham Technology Park and St. Asaph Business Park.

As a forward looking region with a growing Creative & Digital sector, it’s absolutely essential our skills provision includes a strong foundation on the fundamental enabling technologies of Industry 4.0. The digitisation of industry is at the forefront of technological change across all sectors, both Private and Public, whether that be big data, virtual reality, 3D printing or the Internet of Things. The sustainability of our communities, is dependent upon the competitiveness of our businesses and therefore Industry 4.0 ‘readiness’ is essential.



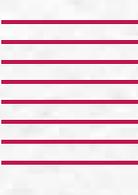
It’s good to see the Creative & Digital sector recognised as one of growth in North Wales. With such diversity and skills on offer across the component parts of the sector, we are seeing increasing cross-linkages and the sharing of skills across platforms - and in many cases across sectors. At Theatr Clwyd, the largest producing theatre in Wales, we look forward to working with education and employer partners to further promote the skills required for the sector in North Wales, to allow us to retain and develop talent in the region, and become a beacon for best practice as we expand our offer and facilities not only across creative and digital, but into tourism, construction and manufacturing - all areas that relate to our day to day

Liam Evans-Ford, Executive Director - Theatr Clwyd



Living in North Wales it was important for me to be able to continue to develop my skills for my business alongside my studies. Being able to complete my degree at Wrexham Glyndwr University enabled me to get the full support and access to the industry I needed, which I have further built upon as the co-owner of Follow Films. Our mantra is to use the right skills to deliver honest filmmaking, working without ego and focusing on the stories our many clients ask us to tell.

Graham Cooper, Co-Founder - Follow Films





With the population living longer, and an increasing range of demands including general and complex health and social care needs to respond to, the skills, knowledge, and competencies within the North Wales workforce needs further support and a more open and inclusive regional approach.

The Health and Social Care sector in North Wales, whilst comprising main sub-sectors including health via the NHS and staff within the Betsi Cadwaladr University Health Board (BCUHB); social care via local authorities; and private health services ranging from potentially, dental and opticians to nursery support for children; it is all collectively viewed by Welsh Government on a par with other large multi disciplinary zones of employment as one sector - "Health & Social Services". However, Welsh Government does not include the sector directly as a distinct component as one of their nine economic priority sectors.

Therefore, we in North Wales do recognise the continuing contribution of this large collective sector when viewed (as Welsh Government) as one sector, both within our foundation economy, but also importantly, as one of identified areas of further growth for North Wales.

44,000

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

2,090

REGISTERED BUSINESS UNITS ACROSS THE HEALTH AND SOCIAL CARE SECTOR ACROSS NORTH WALES

500

NEW JOBS EACH YEAR FOR THE NEXT 10 YEARS NEED TO BE FULFILLED ACROSS THIS SECTOR IN NORTH WALES

Whilst not directly referenced within the Growth Vision for the region upto 2035, its components as a sector are clearly identified in how its skills can contribute, should the sector more openly engage with the region, on key positive developments around health technology, well-being, addressing worklessness and poverty; and supporting lead partners specialising in up-skilling the wider labour market - both current and future.

"We can no longer view health and social care as separate organisations or services, but need to develop a whole system approach."

Maria Bell, North Wales Social Services Improvement Collaborative

Continued changes within North Wales with a shift of focus from secondary care to primary and community care and prevention, in addition to delivering routine care as close to our communities as possible, will incur challenges on the skills needs and requirements expected, and with the changes resulting from the requirements of the Social Services and Wellbeing (Wales) Act of 2014, will potentially further exacerbate recruitment and training issues for the sector.

DEMAND GROWTH SECTOR: HEALTH & SOCIAL CARE

The workforce within Health and Social Care within North Wales, is therefore in a period of significant change whereby they will be required to deliver services in different ways; with some areas changes being more pronounced than others, whose changes will only be minor.

The increased focus on prevention, protection, intervention, partnership and collective working, alongside great alignment with others and a need for more transparency, will require a renewed focus and emphasis on workforce skills and training within the sector.

All parts of the sector in North Wales, continue to face significant skills and staffing issues, not aided by the uncertainty on Brexit, and the considerable reliance on EU migrant staff to undertake roles not able to be filled by the regional domiciled labour market

Staffing and skills shortages within the health sector in North Wales have seen BCUHB spending on locum staff double between 2012 and 2016 (6.3% of all labour costs on non-permanent staff) further emphasising the issues on recruitment and retention within this sector area.

There is a need to develop more focused and better promoted career pathways across the sector, to attract and retain greater numbers, supported by greater investment in training and skills developments with promotion of entry into the sector via apprenticeships, and FE and HE courses.

New requirements to have social care workers registered with Social Care Wales, mean that those currently employed within the sector will need to have an agreed level of qualification. However, there is no additional funding to pay for individuals qualifications to meet criteria, and therefore a risk of losing further staff from the sector.

The sector generally is looking to work more inclusively with the region, to support the development of appropriate and demand led services which will challenge what exactly the skills and types of workers in the future will be needed. This will hopefully see a stronger link with providers within the Third Sector as well as community organisations to support skills based on need and demand in North Wales.

There is a need in North Wales to look at how we develop skills, knowledge and competencies to deliver services differently, and this includes outlets such as the new suite of qualifications for Health & Social Care, Childcare, and Playwork.

A regional approach to Leadership and Management within the sector is required and already acknowledged by service professionals within North Wales. Particularly within the private residential care sector where succession planning to ensure future managers are developed, supported and retained will be critical, as 13% of managers currently leading in the sector are not appropriately qualified.



11,140

HEALTH, PUBLIC SERVICES
AND CARE LEARNING
ACTIVITIES AT FEI'S IN
NORTH WALES IN 2016

3,335

HEALTHCARE AND PUBLIC
SERVICES AND CARE
APPRENTICESHIPS IN NORTH
WALES IN 2016

500

STUDENTS AT HEI'S IN NORTH
WALES STUDYING SUBJECTS
ALIGNED TO MEDICINE, HEALTH
AND SOCIAL CARE IN 2016

Apprenticeships are being promoted increasingly in the sector to encourage, retain and develop skills. During the last year, some employers within the private residential care sub-sector across the region who have taken on and promoted apprenticeships include Pendine Park, Michael Phillips Care Agency Ltd, Fairways Care Ltd, Cymorth Llaw Ltd, and Carelink Homecare Services Ltd.

The majority of staff in social care were female; commissioned care providers in Gwynedd had the highest percentage of male staff out of all the local authorities in Wales, at 23%, while Flintshire had the lowest at 10%. At both regional and local authority level and across Wales, the majority of staff working for commissioned care providers were aged 41-50, followed by the 31-40 age bracket.

The sector aims to develop an approach to supporting an aging workforce remain ahead of technology and developments across sector practices and initiatives. This it is hoped, will aid retention of staff and complement a broader recruitment attraction strategy for the region.

The National Social Care Workforce Development Partnership report for 2015 commissioned by the sector and Welsh Government, highlights that the average figure for North Wales in terms of care providers who can effectively communicate through the medium of Welsh, was 24%. However, in Anglesey this is 61%, and Gwynedd, 56%, whilst in Conwy, it is only 16%, and Denbighshire, 11%.

Projection data on employment status for the sector in North Wales indicates that male employment in Health and Social Work will increase slightly from 8,000 in 2004 to 10,000 in 2024. Female employment will expand significantly from 31,000 to 40,000.

The occupational breakdown shows that male employment in health professional occupations in North Wales is projected to increase to 4,000 in 2024, while female employment will rise from 7,000 to 12,000. Male and female employment in health and social care associate professional occupations will both double to 2000 and 4000 respectively in 2024. In caring personal service occupations, male employment will grow to 2,000 in 2024, while female employment will increase from 13,000 to 17,000

DEMAND GROWTH SECTOR: HEALTH & SOCIAL CARE

+10.2%

Increase needed in Professional occupations within the sector up to 2024

+9.0%

Increase needed in Associate Prof. and Technical occupations within sector up to 2024

-37.7%

Decrease forecast in Skilled Trade occupations within the sector up to 2024

+7.6%

Increase needed in Caring & Other Services within the sector up to 2024

40%

37%

39%

43%

REPLACEMENT DEMAND



Bwrdd Iechyd Prifysgol
Betsi Cadwaladr
University Health Board

“A new traveling Welsh language tutor for the region has been appointed by BCUHB to support staff from all professional backgrounds. Many Welsh speakers feel more comfortable communicating in Welsh, especially in a healthcare setting, and providing support for non-Welsh speaking staff to learn and develop their Welsh language skills will increase the capacity within the health board to ensure a better level of service.”

Eleri Hughes-Jones, Betsi Cadwaladr University Health Board



I thought an apprenticeship would be mundane but I was surprised at how hands on it was. My confidence levels were very low when I started but working with my peers, the training I received and my assessor’s support helped me to achieve Level 2 and inspired me to continue on to Level 3. An apprenticeship was definitely the right way to go.

Ioan Wright - Health & Social Care Apprenticeship,
Pendine Park Care Services



The tourism and hospitality sector continues to be a key contributor to the economy within North Wales, generating almost £2billion per annum. With increased investment and expansion forecast with a move away from seasonal only offers, to one with more of a permanent, year round suite of attractions, it is identified as one of the growth sectors for employment and skills across the region within the Plan. This has been further cemented by guide book Lonely Planet naming North Wales as the fourth best location in its annual review of holiday locations.

A Welsh Government Strategy for the Tourism Industry was launched in 2013 with a focus upto 2020, and was recently updated and reviewed in December 2016.

In relation to North Wales, it notes how it will continue to invest alongside local and regional partners, in schemes and attractions which fit with our strongest appeal to tourists, such as the recent investments in Surf Snowdonia and Zipworld.

Significant tourism attractions such as these not only boost visitor numbers to the region, they also drive and generate further demands in related areas such as transport, accommodation, catering and other tourism-related businesses; all of whom require a combination of both unique and transferable skills.



Analysis within previous Regional Skills & Employment Plans for North Wales identified growth of 3,000 new jobs within the sector over the next 5-10 years based on continued developments in line with current estimates. This figure remains consistent as growth in this sector in North Wales is expected to outperform the rest of Wales, coupled with the need to fill vacancies created by a potential exodus of EU nationals currently working across North Wales, returning back to Europe post Brexit.



Visit Wales launches £5m global Year of Legends campaign with a worldwide advertising campaign filmed at Llyn Llydaw in Snowdonia. The campaign challenges tourist visitors to North Wales and other areas to #FindYourEpic, supported by the skills of the industry across the region.

DEMAND GROWTH SECTOR: TOURISM & HOSPITALITY

The Welsh language is critical to the sector as a key conduit between culture and economy, and to demonstrate the strength of welcome we offer to visitors. It also shows the support we wish to see regionally to further promote those to work in the sector, who are Welsh speakers.

With the further development of anchor attractions across North Wales, the impact on the growth of other associated areas such as food and catering, is also presenting challenges. One such challenge is a lack of chefs within North Wales, and key employers and venues, having to now hire agency chefs at considerable higher cost, to meet and fulfil vacancies for which there appears to be no depth of domiciled qualified individuals within the region.

According to Arwyn Watkins, President of The Culinary Association of Wales, speaking at the Visit Wales Tourism Summit in May 2017, there is a real shortage of chefs. It is believed that this is a “people shortage” and not a skills shortage, as our colleges and work based learning providers deliver quality training and courses, with strong numbers of students, but retention of qualified individuals in the region is a challenge and remains low.

800

APPRENTICESHIPS IN
LEISURE, TOURISM &
HOSPITALITY ACROSS NORTH
WALES IN 2016

4,490

LEARNING ACTIVITIES AT FEI'S
IN TOURISM, LEISURE AND
CATERING ACROSS NORTH
WALES IN 2015-16

290

APPRENTICESHIPS WERE AT
LEVELS 3 & 4 FOR THE SECTOR
ACROSS NORTH WALES IN 2016

In 2015 the Regional Skills Partnership worked with partners within the sector and produced a report that looked at skills particularly in the outdoor tourism sector of North Wales. One of the key issues raised here was the lack of higher apprenticeships available for the sector.

The report also found that there was a lack of coordinated approach to outdoor tourism qualifications and that their contents did not fully prepare candidates for the roles in the workplace as they did not include the specialised leaders certificates and experiences required.

Projection data for the tourism and hospitality industry in North Wales, and specifically on employment status, shows that male employment in the accommodation and food subsector of tourism will have increased from a total of 10,000 in 2004 to 12,000 in 2024. Female employment decreases, from 15,000 in 2004 to 14,000 in 2024, following the national trend.

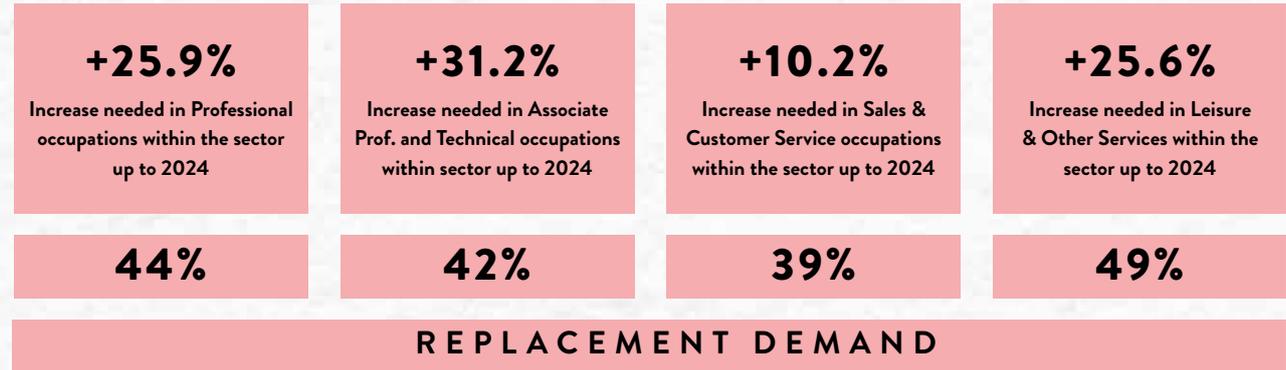
Female employment in elementary administration and service occupations in accommodation and food is projected to decrease from 9,000 in 2004 to 7,000 in 2024, while male employment increases from 4000 to 5000. Male and female employment in other related skilled trades, which include food preparation and hospitality trades, for example, catering and bar managers, sees no change at 3,000 and 1,000 respectively. Across Wales, in contrast, male employment in other related skilled trades is projected to increase in the same timeframe.

In North Wales we also expect to see a sustained demand for skilled trades (which include food preparation and hospitality trades) as well as further sales and customer service occupations, in addition to higher level skills, particularly in project and people management.



Our education providers are increasingly working closely with sector employers to attract and develop appropriate skills, such as recent joint recruitment events between Grwp Llandrillo Menai and Dylan's new Llandudno restaurant and venue for upto 60 multi-skilled and disciplined jobs.

Welsh Government working with the industry is planning to support skills in the sector further by introducing a National Tourism Award for excellence in customer service in 2017/18, in addition to investigating the development of a customer service element in the Welsh Baccalaureate.



The above figures show the percentage of new recruits required between now and 2024 within each of those key areas specifically within the Accommodation & Food Service sub-sectors of Tourism & Hospitality in North Wales. The 31.2% increase required within associated professional and technical includes chefs as noted previously. However, when taking into account those who will leave the sector due to Brexit, seasonal departees, retirement, and sector leavers, for front line leisure general staff (including bar and waiting staff, domestics, etc) we need a replacement demand of almost 50% by 2024.



The Tourism and Hospitality industry in North Wales continues to grow at a pace, and aided by the Lonely Planet recommendation we expect to increase further our year round visitor numbers. However, we still have recruitment and skills issues connected to sustainable career pathways, particularly amongst local people. Our increasing reliance on foreign nationals to fill vacancies for which we can't recruit locally, will become more of an issue as Brexit negotiations take an impact, and will further potentially exacerbate issues around recruitment of key roles such as currently with chefs across North Wales.

Jim Jones, Managing Director - North Wales Tourism



My apprenticeship through Coleg Cambria has been a life changing decision. I have learned a skill that has helped me to achieve my dream and develop my English language skills. I have a full-time job and feel confident to say I am a good chef. My assessor encouraged me to go all the way - believe in yourself and look at me now.

Tomasz Franc, Level 3 Professional Cookery, Aramark

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

The industry in North Wales is a combination of a variety of different careers ranging from elements within agriculture, sales, marketing, production, logistics, and product development. The roles involved include food scientists and technologists, production managers, chefs, product development, butcher, baker, nutritionist, supply chain manager, and researchers amongst many others. (Tasty Careers Wales – supported by Welsh Government, have mapped all of the roles involved within the industry, and can be accessed via tastycareerswales.org.uk)

1,000

POTENTIAL NEW JOBS IN
THE SECTOR ACROSS NORTH
WALES IN NEXT 5 YEARS

275

APPRENTICESHIPS AVAILABLE
IN THE SECTOR IN NORTH
WALES IN 2016

70%

BUSINESSES IN THIS SECTOR
IN NORTH WALES EMPLOY LESS
THAN 10 PEOPLE

With approximately 27% of the agricultural workforce in Wales, resident within North Wales, the agriculture industry is one which has seen a gradual decline over the last 5 years in the region. However, this industry has also seen an increased diversification into tourism activities, and specialist food and drink production, which is aiding resurgence within this traditional sector.

Recent studies within the sector show that business confidence in North Wales as across the rest of Wales is down, with a figure of 53.1% in 2016 compared to 58.6% in 2015. Contributory factors include cost increases to producers for implementation of the National Living Wage, higher fuel prices and continued uncertainty around Brexit impacting on both exports and foreign labour within the sector.

The sector is however growing in terms of turnover and business units despite employment falling slightly. This suggests that overall productivity of the sector is increasing. Welsh productivity in food and drink continues to be ahead of the UK with GVA per head of £64,800 versus £54,700 at the UK level.

Attraction of young people as new entrants to the industry as a sustainable career pathway is essential if the sector is to continue to develop and evolve the skills to meet new demands with technology for product development

Grwp Llandrillo Menai's Food Technology Centre has been unveiled as a key partner in a £21m Welsh Government initiative, in what is a major boost to the North Wales food industry and economy.

Project HELIX will spearhead academic research into global food production, trends and waste management to help manufacturers across Wales increase production and efficiency.

The North Wales based centre joins Food Centre Wales in Ceredigion and Zero2Five Food Industry Centre, based at Cardiff Metropolitan University, under the umbrella of Food Innovation Wales to implement the scheme.



Some of the employers in North Wales who GLLM support in their apprenticeship programmes within the sector include Glanbia Cheese, 2 Sisters Food Group, Ready Foods, and Harlech Food Service Ltd. In 2016, Coleg Cambria offer 10 flexible learning specialist courses aimed at those working in the Food Manufacturing and/or Catering Industries, as well as 5 full time catering and food preparation courses aimed at full time students.

Coleg Cambria supports a large and increasing number of employers within this sector in both North Wales and cross border with provision including staff development at Levels 2 & 3, via bespoke courses, leading to certificates, diplomas, and apprenticeships. In 2016 they supported 14 apprenticeships with Village Bakery, and are doing so with a further minimum of 9 so far in 2017. This is in addition to other apprenticeship support to employers like Wholebake, and tailored short courses to employers across the sector on the focus of processes involved in food manufacturing and the associated technology.

In North Wales there were 275 food and drink manufacturing apprenticeships available in 2016. Most of these were at Foundation Level with an increase at Level 3, and Higher Level apprenticeships and is a significant increase on the comparable figure in 2012 of 145.



REPLACEMENT DEMAND



The food manufacturing sector is growing in such an exciting way in Wales and we are incredibly proud to be part of that. Award winning Brighter Foods has seen rapid growth since its start up in 2014. It has already achieved turnover of over £13 million in its second year and provides employment for over 180 people around Tywyn on the North Wales coast. The company has recently been awarded Investors in People status and is launching an apprenticeship scheme this year to develop some of the skills it needs for the future. We are planning significant growth and investment over the next 12 months as we continue to see increased interest (from both new and existing customers) in the ideas we're developing here and in the skills to support the delicious snack bars we make.

Robin Williams, CEO, Brighter Foods



After gaining a Level 3 NVQ in baking industry skills, and being fortunate to have been awarded Coleg Cambria's Food Manufacturing Work Based learner of the year 2016, I have now been promoted to supervisor here at the bakery and have been put on the 12-month management development programme. Village Bakery, is a great place to work and they look after you really well. They are hot on personal development and in January they took me and a few others to St Vith in Belgium, to learn about sour dough and to do some artisan baking. It was a brilliant experience. I'm looking forward to a really bright future at the Village Bakery and want to progress and be a manager one day.

Tom Jackson, Apprentice - Village Bakery, Wrexham

The Growth Vision document for North Wales is clear in the sectors that will help to further drive the economy and skills for the region both currently and in the future, and the financial and professional services sector is one which mirrors the regional aspiration for higher level skills and development of employment and sustainable career pathways.

The Finance and Professional Services sector is one in which there is significant competition, but is underpinned by a pool of highly skilled and qualified people whom need to be supported by advanced infrastructure and supply chains where operational.

With its proximity to cross border existing concentrations of services and employers within this sector (such as Chester Business Park), North East Wales currently has the largest share of businesses in the Financial and Professional Services sector in the region.

Flintshire has approximately 6,100 local units, and Wrexham 6,000. Gwynedd has approximately 4,000 local units, and Anglesey whilst having the smallest number of businesses at 1,400, is relative in terms of other socio-economic demographics.

With this already a growth sector across North Wales, we have seen some of the largest increases in areas such as Wrexham, where the number of business units in recent years has increased by at just over 900, and also in Denbighshire where we saw a similar increase of just over 800. The number of local units in the sector in Anglesey also saw an increase by 200.



Whilst business and administration apprenticeships have decreased overall from 720 in 2014-15 to 615 in 2015-16, we have seen a large increase from 45 to 105 in the demand for higher apprenticeships in business and administration, which aligns to increasing demands from employers in the sector for higher level skills - aided by North Wales' close proximity to larger national and global brands within the sector in the cross border area around Chester Business Park, Liverpool and Manchester.

As Finance Wales evolves into the **Development Bank of Wales**, Welsh Government has confirmed that it will be located in North Wales around Wrexham. A project that will bring 50 new well-paid jobs demanding high level skills, the Bank will be tasked with investing upto £1billion to businesses over the next five years.

Having the new national development bank in North Wales will mean it is ideally located to make the most of the huge opportunities associated with the growth of the cross border financial and professional services sector

Ken Skates, Cabinet Secretary For Economy & Infrastructure



The Chief Executive of Finance Wales, Giles Thorley, notes how he has seen a strong appetite for investment within the region in the last year, and is a positive signpost for both this sector, and the wider North Wales economy. Additional growth is forecast, and the Bank once located around Wrexham, will potentially consider further recruitment to meet demands, and a strong presence in all regions as they scale up to support more micro to medium sized enterprises, including greatly improved access to finance, support services and management advice.

Latest figures show that last financial year Finance Wales directly invested £7.7m in North Wales securing private sector leverage from other investors of £19m.

Welsh Government are working with the sector panel to develop and implement a strategy and action plan for the Financial and Professional Services sector in Wales, with their vision:

We aim to make Wales the most competitive region in the UK for Financial and Professional Services outside London by 2021.

Welsh Government have set 4 key objectives aimed at promoting a sustainable and internationally competitive Finance and Professional Services sector:

1. Growing employment in the Financial and Professional Services Sector
2. Growing Financial and Professional Services Gross Value Add (GVA)
3. Creating the Environment for Growth
4. Raising Wales' International Profile and Attracting Investment

Established companies already in North Wales leading the sector are both AVOX and Moneypenny located in Wrexham.

Since 2010, AVOX has seen its base in Wrexham grow from 140 employees almost 600, despite initial concerns over whether the skills required would meet the demands; whilst Moneypenny in its new £15million headquarters, has capacity for an additional 500 staff in the next few years as it looks to double its existing client base.

TECHNOLOGY

EXPERTISE WILL BE A CRITICAL SUCCESS FACTOR FOR THE SECTOR TO GROW IN NORTH WALES

DIGITAL

SKILLS WILL BE INCREASINGLY REQUIRED FOR STAFF FROM NORTH WALES EMPLOYED IN THE SECTOR

STEM

IN RELATION TO THIS SECTOR SHOULD BE INCREASINGLY REFERENCED WITHIN THE REGIONS SCHOOL CURRICULUM

'TheCityUK's' 2016 report on "UK financial and related professional services (FRPS): meeting the challenges and delivering opportunities" highlights a number of areas for action which apply as much to North Wales, as other regions with a growing financial and professional services sector.

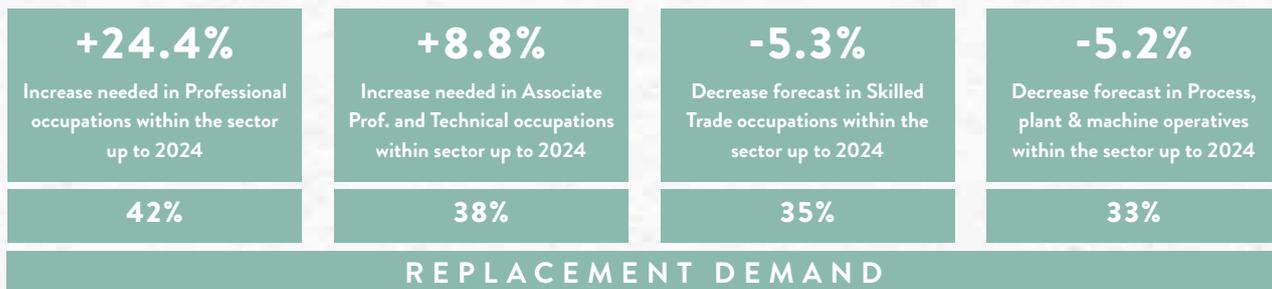
One key area on which they focus, and is applicable to our region, is on building skills and attracting talent. It notes the need for employers to partner with schools and universities to build the next generation of technology skills. Technology expertise is necessary to support innovation across all component parts of this sector if its personnel are to remain competitive. There is a need for greater understanding within education of the needs of this sector, and also for the sector to respond by offering further incentives via apprenticeships and work placement opportunities. Coupled with an increased focus within schools curriculum especially on STEM skills and digital skills, as these are transferable to all aspects of the financial and professional services sector.

DEMAND GROWTH SECTOR: FINANCIAL & PROFESSIONAL

As the sector grows and extends its reach along the A55 corridor into North West Wales, we will see an increasingly assertive jobs market, where salaries will not be the only key driver for current and future employees within the financial and professional services cluster.

This sector is increasingly looking to support home and flexible working to both attract, and retain staff, and with regional organisations like Betsi Cadwaladr University Health Board promoting the work-life balance to professionals and higher skilled workers, and benefits of living and working in North Wales are increasingly being used to address skills demands, whilst potential staff view these elements alongside the organisational culture, as incentives to consider applying for new roles.

The impact of BREXIT is yet to be evaluated on the sector, particularly if there will be reactionary shrinkage within some of the larger sector employers around the cross border areas, or if as some predict, it will open new opportunities without previous restrictions or regulations. With the majority of businesses within this sector in North Wales being SME's and micro businesses, brokering the appropriate level of skills support to meet their changing demands in an uncertain climate will be critical.



The Financial & Professional services sector is further growing in North Wales and the cross border area, and we at Moneypenny are proud of the skills we develop and nurture within our team. With employers now accessing information and making enquiries on the move via smartphones, tablets and other devices, we and others in our sector, have to make sure we respond to increasing client needs and expectations, and maintain and develop excellent customer service and knowledge through continued skills progression and training with appropriate local and regional partners.

Moneypenny, Wrexham



My BA (Hons) in Business Management gave me a clearer insight into how businesses work, the different sectors within a business, and how to communicate effectively. It gave me a clearer idea of what career I wanted to achieve after finishing university, and how to get there. Studying at Wrexham Glyndwr allowed me the flexibility of maintaining a part-time job, as well as being close to home. The Business Management Degree offers so many different routes and career prospects. My current job involves financial applications, customer service, and global financial knowledge.

Hannah Gainfort, Business Graduate, Wrexham Glyndwr University



The Growth Vision for North Wales is clear in the role of a highly skilled workforce, and employment opportunities at all levels being accessible.

We need to ensure that young people and adults in the region are equipped with the skills that employers need, and ensure that the area provides an attractive employment proposition to attract and retain workers, particularly those with high level skills..... Worklessness will be tackled through the delivery of integrated and co-ordinated programmes that will focus specifically on the individual's needs and circumstances - providing them with the confidence and the support to access the labour market.

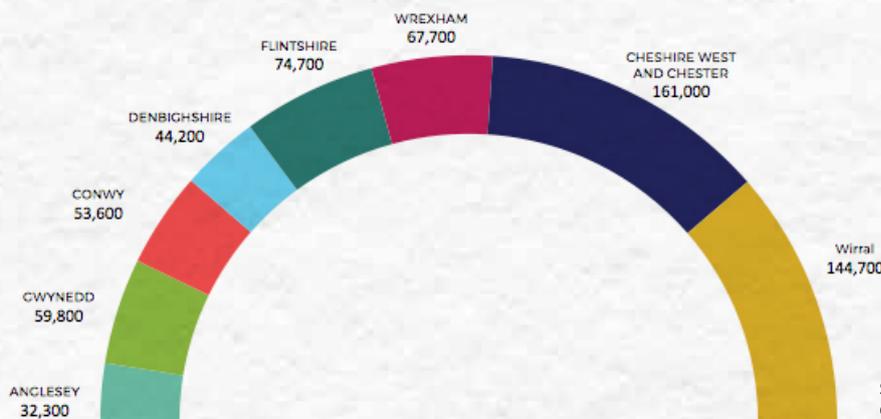
North Wales Growth Vision, July 2016

To aid our future supply of skills within the North Wales labour market in each of our key and growth sectors, we need a continued consistency and coordination regionally via the mechanism that is the Regional Skills Partnership, that also promotes and enables through partners, high quality work placements to be considered compulsory for every technical qualification.

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

Digital skills will become even more prominent as a cross-cutting quality, impacting on both processes and productivity within employment, and within the education environment from coding to social media, and online support to further promote home learning and working.

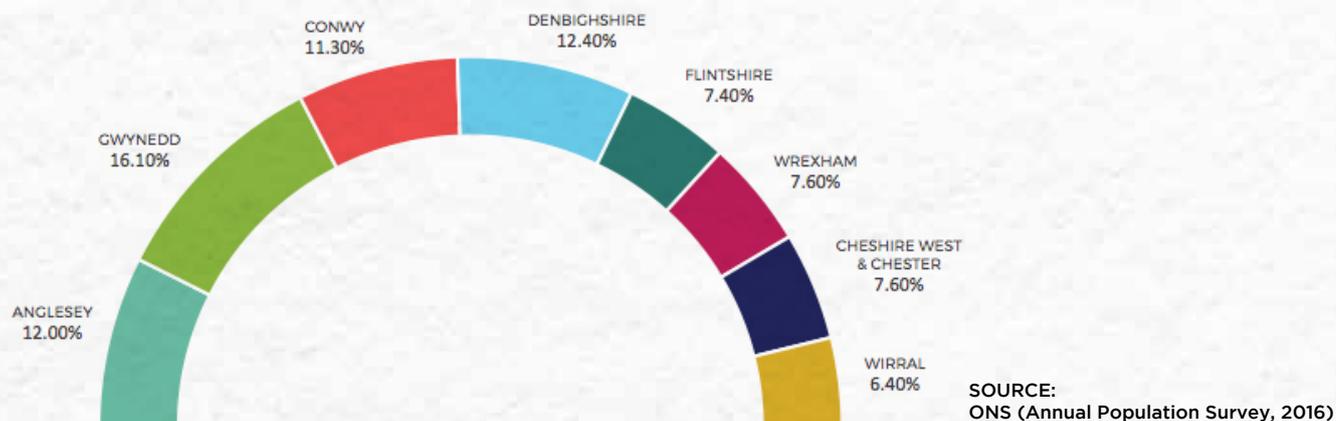
NUMBERS OF ECONOMICALLY ACTIVE PEOPLE DOMICILED IN NORTH WALES AND CROSS-BORDER 2016



SOURCE: ONS (Annual Population Survey, 2016)

The above figures are a combination of those who are currently in employment, either as an employee, or self-employed, alongside those who are currently registered as unemployed, but actively seeking work. The majority of those economically active are employees, ranging from 63,100 in Flintshire and 58,100 in Wrexham, 42,700 in Conwy and 34,500 in Denbighshire, to 24,300 in Anglesey and 42,800 in Gwynedd.

PERCENTAGE OF ECONOMICALLY ACTIVE PEOPLE SELF-EMPLOYED IN NORTH WALES AND CROSS-BORDER 2016



Whilst Gwynedd had both the highest percentage (16.1%) and highest number of entrepreneurs classed as self-employed (13,700), the density of population in other areas does illustrate a growing trend of entrepreneurship in North Wales. Although as a percentage, Flintshire was the smallest of the six North Wales counties with 7.4%, this does equate to 8,400 people when factoring in density of population, as seen by comparison to neighbouring county Denbighshire with 12.4% which equates to 7,700 people.

51,100
PEOPLE OF WORKING AGE WERE SELF-EMPLOYED IN 2016

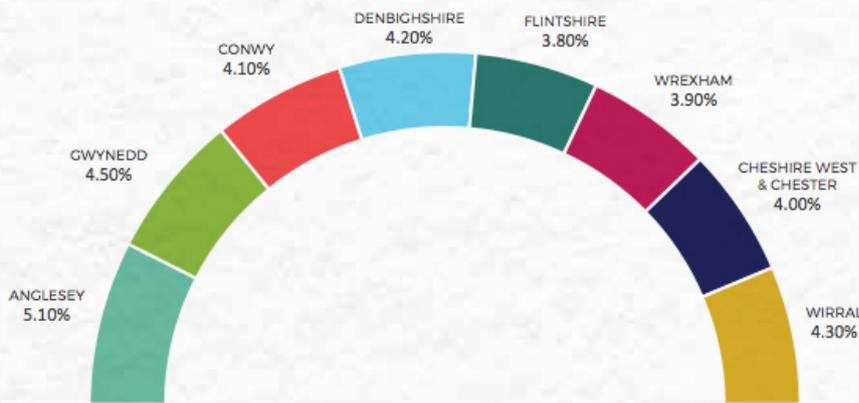
98,100
PEOPLE OF WORKING AGE WERE ECONOMICALLY INACTIVE IN 2016

36,400
WORKLESS HOUSEHOLDS WITH WORKING-AGE RESIDENTS IN 2016

The unemployment rate across the majority of North Wales and cross-border areas fell during the last two quarters of 2016 with the exceptions of both Anglesey and Gwynedd which saw small increases during this period. However, the overall rate for the six North Wales counties, continued to decrease from 15,400 in 2015, to 13,900 in 2016.



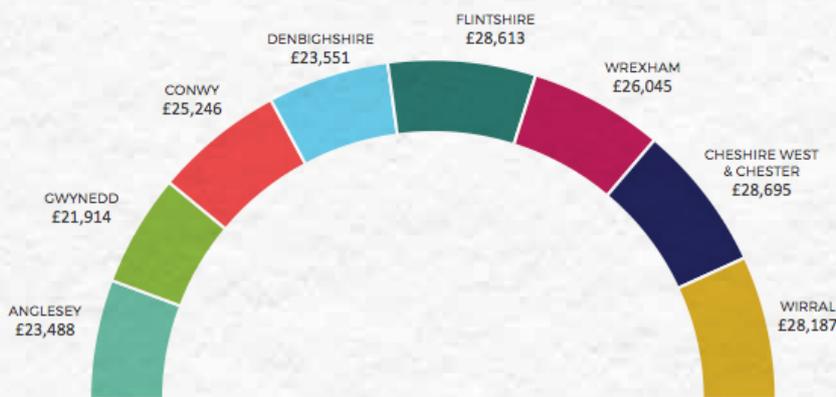
PERCENTAGE OF ECONOMICALLY ACTIVE PEOPLE UNEMPLOYED IN NORTH WALES AND CROSS-BORDER 2016



SOURCE: ONS (Annual Population Survey, 2016)

Schemes run by third sector organisations, the trade unions, and private sector training providers are all critical in assisting those currently removed from, or at risk within the labour market, to upskill and improve their potential aspirations and mobility of skills. Those especially who are economically inactive aged over 25 need coordinated initiatives at a regional and national level to address multiple and often complex barriers to employment. Regional projects such as OPUS to over 25's and ADTRAC for 16-24 year olds, will be key to addressing many of these issues, and supporting individuals with appropriate skills and directing towards employment opportunities.

AVERAGE GROSS ANNUAL PAY FOR PEOPLE WHO LIVE AND WORK IN NORTH WALES AND CROSS-BORDER 2016



SOURCE: ONS (Annual Population Survey, 2016)

Across the six North Wales counties we see a variation of £6,699 between the highest average annual salary (Flintshire) and the lowest (Gwynedd). This variance is also reflected in the gross hourly pay analysis for the region with Gwynedd having £10.82, and Flintshire having £14.31. This is due to the significant variation in employers and the industries present in both counties, and illustrates the challenges to raise skills and wage levels in the west of the region, to bring them closer in line with those in the east of the region.

121,000

PEOPLE OF WORKING AGE
EMPLOYED IN 'SENIOR,
PROFESSIONAL, ASSOCIATE
AND TECHNICAL ROLES'

76,200

PEOPLE OF WORKING AGE
EMPLOYED IN 'SKILLED
TRADES AND ADMINISTRATIVE
& SECRETARIAL ROLES'

62,300

PEOPLE OF WORKING AGE
EMPLOYED IN 'PROCESS, PLANT,
MACHINE OPERATIVES AND
ELEMENTARY ROLES'

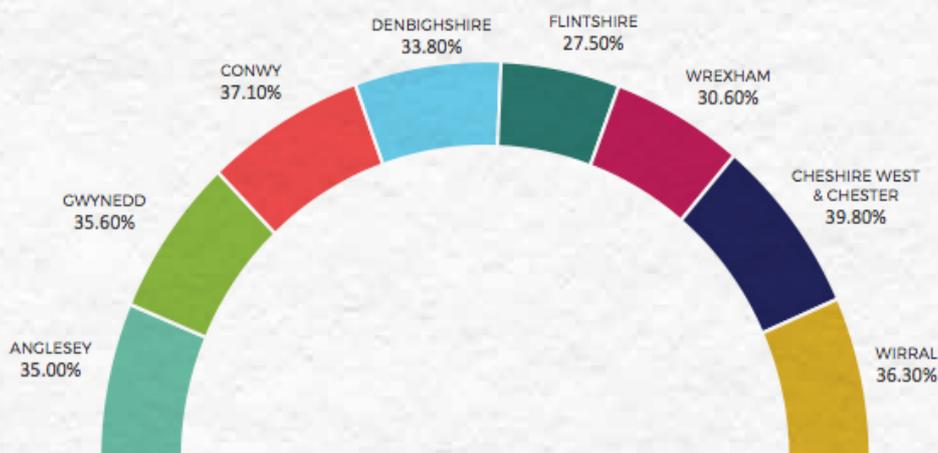
40.6% of employment of those domiciled in Conwy is within the 'Senior managers, professional, associate and technical' cluster of job roles, followed by Denbighshire with 39.3% and Wrexham with 39%. Gwynedd has 38.5%, Flintshire with 36.7%, and Anglesey with 36.1%.

The highest percentage of those domiciled within the 'skilled trades and administrative' cluster is Flintshire with 26.1% followed by Anglesey with 25.6%. Denbighshire has 23.9% and both Gwynedd and Conwy have 23.7% each. Wrexham has 21.6%. However, when looking at actual numbers of people involved, Wrexham with 14,100 comes second to Flintshire with 18,700.

Within the cluster of 'Care, Leisure, Sales & Customer Service' - much of which can be classed as being part of the "Foundation Economy" in North Wales, Denbighshire has the highest domiciled section of the labour market with 20.1%, followed by Anglesey and Wrexham both with 19.3%. Conwy has 19.2%, Gwynedd 17.3% and Flintshire 14.4%. However, when analysing the supply in terms of actuals, Wrexham has the highest number with 12,600, followed by Flintshire with 10,300. Conwy has 9,900 and Gwynedd 9,800.

Although having the largest percentage of the domiciled workforce in this sector, Denbighshire in actual numbers has the second smallest with 8,500, followed by Anglesey with 5,800.

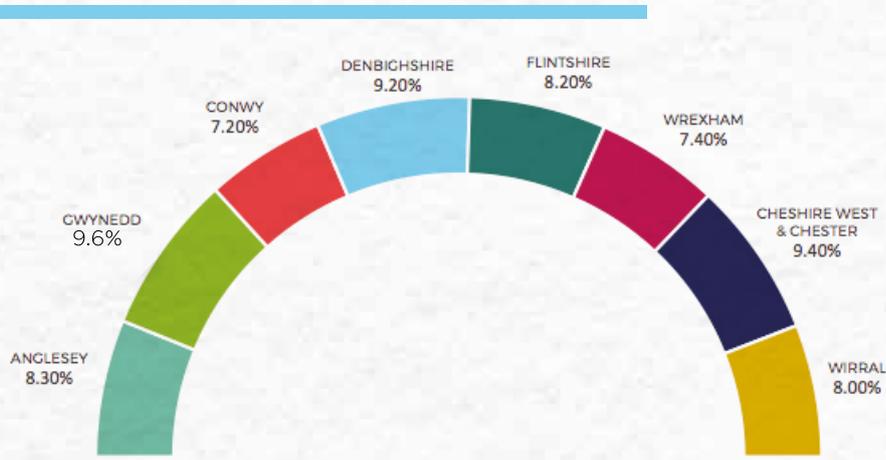
PERCENTAGE OF PEOPLE QUALIFIED WITH NVQ4+ WHO LIVE & WORK IN NORTH WALES AND CROSS-BORDER 2016



SOURCE:
ONS (Annual Population Survey, 2016)



PERCENTAGE OF PEOPLE WITH NO QUALIFICATIONS WHO LIVE & WORK IN NORTH WALES & CROSS-BORDER 2016



SOURCE: ONS (Annual Population Survey, 2016)

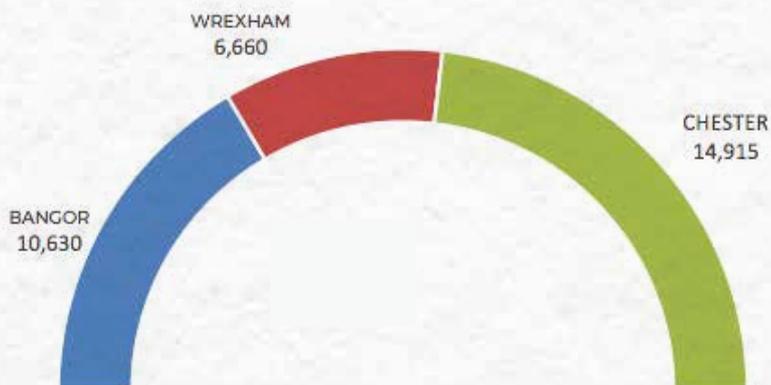
In 2016 there were approximately 17,290 students studying at our higher education institutions at Bangor and Wrexham. This doesn't also include those students domiciled in North Wales who are also studying towards a higher education qualification from the Open University, and both of our Further Education providers.

The Open University has a high concentration of students who study remotely and part-time within rural areas across North Wales, promoting an approach based on technology and blended learning that is innovative and market leading and overcomes geographic barriers to learning.

In addition to Bangor and Wrexham Glyndwr Universities, we also have the University of Chester within close proximity and there are growing links between these institutions along the North Wales A55 corridor. These are in addition to the strong relationships that exist with other Universities including Aberystwyth, Swansea and Cardiff primarily.

The retention of higher level skills and qualified individuals continues to be a key challenge for the region and its employers. All institutions at HE and FE levels have strong links with employers, and this needs to be further supported and exploited to try and retain higher numbers of our graduates, particularly those who are already domiciled here in North Wales.

TOTAL NUMBER HE STUDENTS BY PROVIDER AND LEVEL/METHOD OF STUDY IN 2016



SOURCE: HESA (Students in Higher Education)

From recent collaborative work undertaken by all three universities with cross-border partners, analysis of trend data over the last four years shows that an approximate 80% of domiciled graduates collectively at the three institutions would prefer to stay within the region to work.

For those students graduating from the three universities, but domiciled outside of the North Wales and cross-border area, the result is only 23%. However, this figure has been increasing year on year since 2012, and demonstrates a shift in the recognition of the economic and employment opportunities on offer, and a gain for the region in retaining higher level skills.

Analysis by the three Universities shows that over a four year period from 2012-16, 61% of graduates collectively entered employment in one of the key or growth sectors identified, and this result was predominantly static during this period.

61% of graduates on entering employment, did so in a key or growth sector

Of those 61% of graduates entering employment in a key or growth sector, 47.7% entered employment in 'Life Sciences, Health & Care' related jobs; 28.7% entered employment in 'Retail, Tourism & Hospitality' related jobs; and 8.9% entered employment in 'Financial & Professional' related jobs.

Of note is that of the 39% of graduates from institutions within the North Wales and cross-border area, the majority found employment within sectors more commonly associated with the 'Foundation Economy', which collectively makes up at least 173,000 of the North Wales workforce.

28,165

UK DOMICILED STUDENTS STUDYING AT BANGOR, WREXHAM GLYNDWR & CHESTER COLLECTIVELY IN 2016

1,180

EU DOMICILED STUDENTS STUDYING AT BANGOR, WREXHAM GLYNDWR AND CHESTER COLLECTIVELY IN 2016

2,860

NON EU DOMICILED STUDENTS STUDYING AT BANGOR, WREXHAM GLYNDWR AND CHESTER COLLECTIVELY IN 2016



FIRST TIME DEGREES IN NORTH WALES BY FULL TIME PROVISION 2016

BANGOR UNIVERSITY

Biological sciences	2,286
Subjects allied to medicine	872
Business & administrative studies	653
Physical sciences	550
Languages	516
Social studies	504
Education	421
Historical & philosophical studies	355
Creative arts & design	328
Law	238
Computer science	209
Engineering & technology	204
Mass comms & documentation	165
Agriculture & related subjects	157

WREXHAM GLYNDWR UNIVERSITY

Languages	397
Historical & philosophical studies	346
Creative arts & design	299
Law	274
Combined	258
Business & administrative studies	250
Mass comms & documentation	240
Education	205
Computer science	111
Mathematical sciences	94
Engineering & technology	64
Architecture, building & planning	44
Social studies	29

SUPPLY NORTH WALES

The student breakdowns for both North Wales based Universities illustrate the difference in attraction of both those domiciled in North Wales, and those from outside of the region to embark on their higher education qualifications.

Bangor attracts a great number of students from outside of the region and internationally, confirming its global reputation, whilst Wrexham Glyndwr support a strong local and sub-regional demand for Higher Education across North East Wales and North West England particularly; although both have relative high numbers of EU and international students.

Wrexham Glyndwr has the highest of the two in terms of EU domiciled students with 545 in 2016 studying at Wrexham, compared to 425 EU domiciled students at Bangor. However, when analysing the demands from international non-EU students, Bangor attracts 1,790 students, compared to 295 for Glyndwr.

In comparison, Chester attracted 210 EU domiciled students in 2016, and 645 non-EU international students. They took the largest share of the three in relation to UK domiciled students, with a total of 14,060 (Bangor was 8,415, and Wrexham Glyndwr, 5,690).

52%

OF ALL STUDENTS STUDYING
AT WREXHAM GLYNDWR ARE
FEMALE

30%

OF ALL STUDENTS STUDYING
AT WREXHAM GLYNDWR ARE
UNDER THE AGE OF 20

32%

OF ALL STUDENTS STUDYING AT
WREXHAM GLYNDWR ARE AGED
OVER 30

56%

OF ALL STUDENTS STUDYING
AT BANGOR UNIVERSITY
ARE FEMALE

47%

OF ALL STUDENTS STUDYING
AT BANGOR UNIVERSITY ARE
UNDER THE AGE OF 20

19%

OF ALL STUDENTS STUDYING AT
BANGOR UNIVERSITY ARE AGED
OVER 30

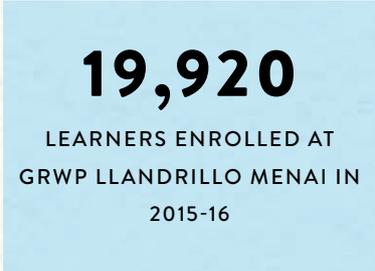
It should also be noted that in 2015-16, both our FE providers in North Wales delivered HE courses. According to Welsh Government figures from the LLWR database, Coleg Cambria had 975 students studying at HE level, and Grwp Llandrillo Menai has 1,865; both of which are increases on the total figures for 2014-15 of 760 for Coleg Cambria and 1,740 for Grwp Llandrillo Menai.

Both of our Further Education colleges in North Wales continue to lead the way as two of the largest institutions in this sector across Wales.

Coleg Cambria received an excellent from their Estyn inspection in 2016, and continues to build on investments across the college components to support further development of teaching and learning. This has included to date, the opening of the new Sixth Form Centre, and also the University Centre, both at Deeside, a new engineering centre at Bersham, and a Leadership & Management Centre at Northop.



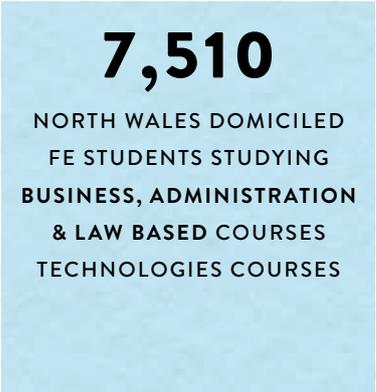
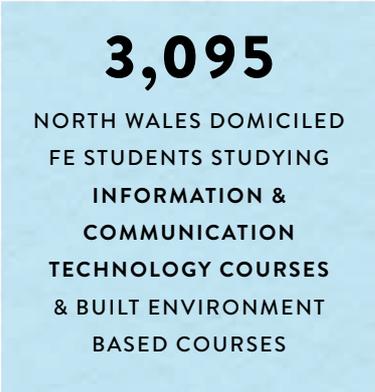
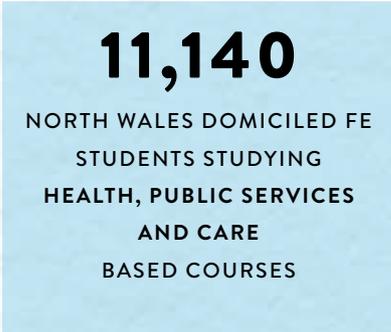
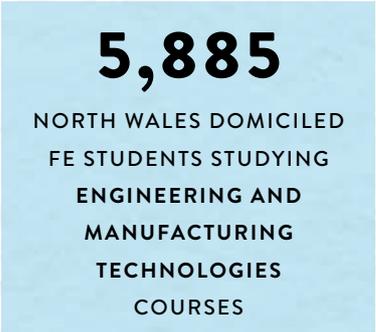
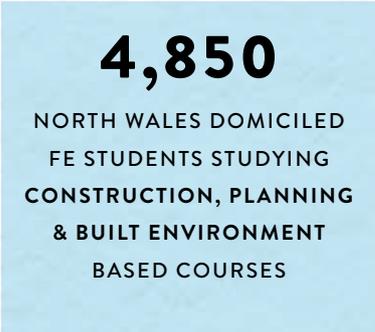
Grwp Llandrillo Menai underwent an inspection from Estyn in 2017 and were commended with prospects for improvement deemed to be 'excellent', and its current performance was graded as 'good'. It continues to expand facilities at all of its sites across a wide geography. Joining the University Centre at Rhos, and recent Energy and Construction centres at Llangefni will soon be a new £30m development to include a new Engineering Centre of Excellence in Anglesey to support Wylfa Newydd.



Flexibility of choice and delivery continues to evolve within our FE providers to meet employer and individual needs. Of all enrolments in 2015-16, 12,420 students studied at our FEI's full time (6,255 at Cambria, and 6,165 at GLLM); with 17,145 students using part-time methods to undertake their studies (7,295 at Cambria and 9,850 at GLLM).

Of their total cohorts of students during 2015-16, there were 4,065 Work Based Learning students with Coleg Cambria, and 2,645 with Grwp Llandrillo Menai.

10,600 full time learners domiciled in North Wales left FEI's in 2015-16 of which 9,390 were under the age of 24. At least 1,700 went directly into employment, whilst 6,100 opted to continue their studies and qualifications, and 1,500 progressed into higher education institutions.



With students in key and growth areas above to address the supply of skills needed to meet demands, the demands around gender equality and perceived stereotyping of certain sectors and roles, are still being addressed by regional partners.

Currently within the courses listed above, we still see 68% of students on Health, Public Services and Care based courses delivered being females. Within the Construction, Planning and Built Environment cohort, we still see 97% of students undertaking applicable courses being male. For Engineering and Manufacturing Technologies, we still only have 19% of female students who are on this cohort of subjects.

Bilingual delivery of learning within North Wales continues to be important, with increased focus on supporting employers to promote the use of the Welsh language in the workplace, and also support for students for whom Welsh is their first language. This aligns to Welsh Government policy on promoting the creation of upto 1million Welsh speakers at all levels and ages by 2050.

Within Further Education across North Wales, there were 695 learning activities within Health, Public Services and Care delivered bilingually in 2015-16 to those domiciled in North Wales; 1,350 for Retail, Hospitality and Commercial Enterprises; 810 for Construction, Planning & Built Environment Courses; and 700 in Engineering and Manufacturing Technologies.

The Welsh Government within the term of this Assembly have committed to creating 100,000 higher level apprenticeships across Wales. The focus will now be on all-age apprenticeships rather than just those aged 16-24 as previously.

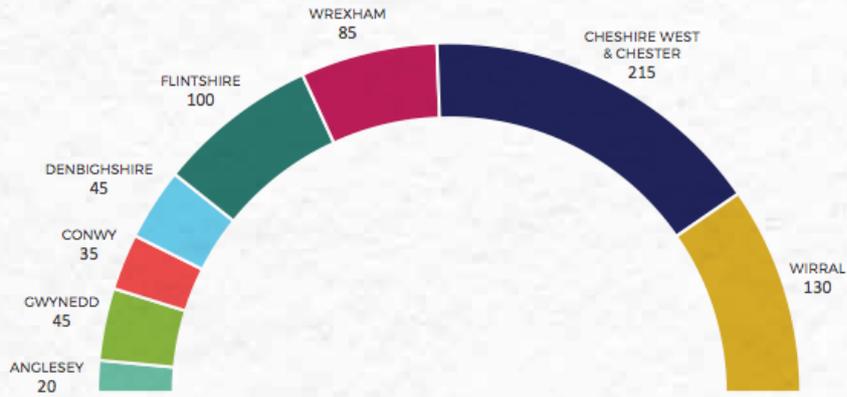
Our training providers and education providers already promote and support apprenticeships with employers across the region. However, the introduction of the Apprenticeship Levy has created confusion and uncertainty due to the different mechanisms deployed in Wales compared to England.

This presents a number of challenges to the labour market, employers, and providers who are engaged within the cross-border areas. As noted elsewhere within the Plan, 28,300 travel routinely from Wales into England to work, and 32,400 routinely in the other direction. This does not include the considerable number of students and learners who also cross the border each day to benefit from applicable provision and demand.

The scope of the impact of the Apprenticeship Levy may currently be underestimated within North Wales, as based on the £3million threshold equating to approximately on average, 110 employees or more, that could infer that upto 330 businesses would be eligible across North Wales.



NUMBER OF BUSINESSES WITH AT LEAST 100 EMPLOYEES WHO COULD BE ELIGIBLE FOR THE LEVY IN 2016



For those employers across North Wales who are eligible to pay the Levy, we need to work more closely with them via the Regional Skills Partnership, to understand what their requirements and needs are in line with local and regional priorities. With this additional intelligence we can both better support delivery partners in prioritisation and focus aligned to the North Wales Growth Bid, and also support Welsh Government in line with future national policy and prioritisation.

Across North Wales our challenge in addition to supporting the Welsh Government Apprenticeship Policy Programme is to meet regional needs for the promotion and growth of apprenticeships in line with our key and growth sectors, with more visible entry points into higher level apprenticeships.

550

NORTH WALES DOMICILED FE STUDENTS STUDYING CONSTRUCTION, PLANNING & BUILT ENVIRONMENT BASED COURSES

865

LESS FOUNDATION LEVEL APPRENTICES IN NORTH WALES IN 2015-16 (3,615) COMPARED TO PREVIOUS YEAR (4,480)

165

LESS FEMALE APPRENTICES IN NORTH WALES IN 2015-16 (5,405) COMPARED TO PREVIOUS YEAR (5,570)

475

LESS APPRENTICES IN NORTH WALES AGED 25-64 IN 2015-16 (4,140) COMPARED TO PREVIOUS YEAR (4,615)

30

LESS APPRENTICES IN NORTH WALES AGED 16-18 IN 2015-16 (1,335) COMPARED TO PREVIOUS YEAR (1,365)

85

MORE APPRENTICES IN NORTH WALES AGED 19-24 IN 2015-16 (3,820) COMPARED TO PREVIOUS YEAR (3,735)

There is a concern amongst smaller business owners across North Wales who are members of the FSB, Chamber of Commerce, and North Wales & Mersey Dee Business Council, that the larger employers attract the best potential apprentices, often due to factors including higher pay, clearer progression routes, and additional employee benefits on offer within global and multi national employers.

However, within our skills supply we need to do more to attract and retain those potential apprentices who are interested in more innovative and flexible environments, where there is a greater degree of creativity. It is the smaller firms and businesses across North Wales which can offer this type of package, and should be promoted further as a positive to possibly the more vocationally talented apprentices within North Wales.

TOTAL NUMBER OF APPRENTICESHIPS FOR CONSTRUCTION INCREASED IN 2016, INCLUDING A FALL IN LEVEL 2 AND AN INCREASE AT LEVEL 3

TOTAL NUMBER OF APPRENTICESHIPS FOR MANUFACTURING DECREASED IN 2016, BUT INCREASED IN LEVELS 3 & 4

TOTAL NUMBER OF APPRENTICESHIPS FOR HEALTHCARE & PUBLIC SERVICES INCREASED IN 2016, AND INCREASED BY 375 IN LEVEL 4

Our flagship regional employers such as Airbus continue to invest in attracting and promoting apprenticeships within the region, with 75 craft and 30 under graduate apprentices having been offered in 2016, and approximately 120 new apprentices at different disciplines being offered in September 2017.

The recent completion of the construction of HMP Berwyn at Wrexham saw the creation of 100 apprentices in construction and related sectors by regional partners working directly with the primary contractor, as well as contractors within the supply chain for the project, to promote attracting new recruits into all aspects of the sector.

With North Wales employers exceeding the Wales national average of 13% for apprenticeships offered, we see a slowly increasing roster of businesses supporting apprenticeship programmes for upskilling and developing further those already in employment, in addition to new entrants into the labour market.

Companies across North Wales in addition to those referenced above who offer and support apprenticeships with support from our providers, include Jones Brothers, who continue to promote and encourage apprenticeships within both general construction and plant machinery operations at their accredited training centre.

Other employers supporting apprenticeships include TATA Steel; Siemens; Holyhead Marine; Village Bakery; Pendine Park; Wholebake; Glanbia Cheese; Harlech Food Service; Babcocks at RAF Valley; Portmeirion; Venue Cymru; Magnox; and RWE amongst many others.



Promoting the future supply of skills for Wylfa Newydd, Horizon Nuclear Power also recruited their first cohort of 10 apprentices in North Wales during 2016 as it launched its Technical Apprenticeship Scheme. It aims to recruit a further 12 apprentices during 2017-18 for its three year programme, which has recently seen the first 10 apprentices gain valuable work and study experience during a two week visit to facilities within Japan.



Private training providers are also a strong delivery for apprenticeships and work based training in North Wales, working closely with employers and individuals across a broad range of sectors and geographies to support staff from operational entry level, to senior and managerial levels. Many of the private training providers also offer speciality in certain key and growth sectors, and help address retention and succession issues in terms of provision to meet statutory and mandatory industry requirements.

The main sectors and areas of activity within North Wales for delivery of work based learning activities for individuals are:

CARE & PERSONAL DEVELOPMENT	BUSINESS MANAGEMENT & OFFICE STUDIES	INFORMATION TECHNOLOGY	MEDIA COMMUNICATION & PUBLISHING	MATHEMATICS
CATERING & HOSPITALITY	ENGINEERING	RETAIL SALES & MARKETING	HEALTH & SAFETY	CONSTRUCTION

The roles of DWP, Careers Wales, and Third Sector providers can also not be underestimated in their contribution to supporting individuals and addressing barriers to employment. The benefit of tailored and bespoke, face to face support to address personal capacity and skills issues directly is increasingly critical to help individuals become more “work-ready” in North Wales, and help address broader employability issues.

66.7%

PUPILS ACHIEVED A*-C IN
MATHS GCSE IN SCHOOLS
ACROSS NORTH WALES
DURING 2016

82.9%

PUPILS ACHIEVED A*-C
IN SCIENCE GCSE IN
SCHOOLS ACROSS NORTH
WALES DURING 2016

59.9%

PUPILS ACHIEVED A*-C
IN ICT GCSE IN SCHOOLS
ACROSS NORTH WALES
DURING 2016

77.0%

PUPILS ACHIEVED A*-C
IN MATHS A-LEVEL IN
SCHOOLS ACROSS NORTH
WALES DURING 2016

73.0%

PUPILS ACHIEVED A*-C IN
CHEMISTRY A-LEVEL IN
SCHOOLS ACROSS NORTH
WALES DURING 2016

48.3%

PUPILS ACHIEVED A*-C
IN ICT AT A-LEVEL IN
SCHOOLS ACROSS NORTH
WALES DURING 2016

There were also 2,400 North Wales domiciled learners studying Maths & Statistics subjects at Further Education providers during 2016; 1,410 which were at NQF Level 2 or equivalent, and 495 at NQF Level 3 or equivalent.

There were also 1,430 North Wales domiciled learners studying Science based subjects at Further Education providers during 2015-16; 155 which were at NQF Level 2 or equivalent, and 1,245 at NQF Level 3 or equivalent.

We have continued our work with North Wales Engagement & Progression Coordinators (EPC's) to undertake a full analysis of provision to understand the depth and quantity offered to support our future labour supply who are currently removed from traditional pathways into employment and further training.

A full report was published in 2016, and followed up by an online resource with a dedicated website allowing full search functionality on all the providers by type, geography, and level of provision. The outcome being that at least 34 organisations were delivering across North Wales, and offering over 130 types of provision within each of the six counties.

As part of the work in the region supporting the Donaldson recommendations for the School Curriculum, the Regional Skills Partnership is already working the regional schools consortia for North Wales - GwE - supporting our employer led input into the regional Pioneer Schools programme.

This now allows the RSP in North Wales to directly input into the development of modules aligned with the Successful Futures Programme, and our need in the region, to promote and deliver experiential learning opportunities relating to real life and work situations.

Therefore, whilst collectively demonstrating our collaborative response to Donaldson across North Wales, this also evidences a commitment from partners to support the employability linkages in identification of delivery aligned to future regional labour market demands promoted by the Regional Skills Partnership, whilst supporting knowledge and capacity of education providers.



RECOMMENDATIONS

REF	RECOMMENDATION	UPDATE ON PROGRESS
2016-1	<p>Work with employers, developers and providers supporting key transformational projects within the energy sector and others, to deliver the necessary facilities to create aspiration, and equip local with the knowledge, skills and aptitudes so that they can gain employment in the upcoming developments. This approach will support and promote local careers, economic growth and community growth for the current and future generations.</p>	<p>New state of the art facilities to support skills continue to be developed and planned across providers in North Wales.</p> <p>In NE Wales, the region will benefit from Coleg Cambria's new £10m STEM centre at Bersham Road in Wrexham, and a Leadership and Management Business Centre at Northop. Wrexham Glyndwr University have unveiled an estates strategy to undertake significant investment and development of its campus and facilities.</p> <p>In NW Wales, the development of the Menai Science Park on Anglesey by Bangor University and the continued development of its portfolio of projects including its Nuclear Skills & Research Programme , will complement the £20m extension to facilities of the Llangefni campus of Grwp Llandrillo Menai with a new Engineering Centre of Excellence, alongside its growing Energy Centre and proposals for an AWBR Training Centre to support Horizon Nuclear Power employees at Wylfa Newydd.</p>
2016-2	<p>Work with employers, developers and providers supporting the Manufacturing sector, to further expand and support the development of the necessary facilities and expertise to inspire and equip local people with the knowledge and skills to further develop our labour force to remain competitive with a greater concentration of higher level skills in key areas such as Deeside Enterprise Zone and Wrexham Industrial Estate</p>	<p>Relationships between Welsh Government, HE & FE institutions, and private sector partners to deliver support and facilities for North Wales to promote higher level skills training and support continue to develop.</p> <p>This includes the Cabinet Secretary for Economy & Infrastructure announcing support for a £30million Advanced Manufacturing & Research Institute at Deeside, to focus on sectors including aerospace, automotive, nuclear and food. Developed by the Deeside Enterprise Zone Board, Coleg Cambria, Swansea University, and the AMRC Sheffield, it will include provision of support on products, processes and efficiencies for skills in large and small businesses.</p>
2016-3	<p>Develop closer alignment of the Regional Skills & Employment Plan with regional provider partner planning cycles, to help inform curriculum, resourcing and vision</p>	<p>Mapping of timelines has been undertaken, but timescales chosen by Welsh Government for submission of plans, still doesn't correlate with that of partners. However, improved transparency and collaboration amongst partners to help inform and direct the content for inclusion within timescales has further assisted developments on regional skills planning, with feedback and commentary from partners welcomed. Request to WG for procurement of a forecasting tool on employment and skills data as used by Careers Wales and majority of FEI's in Wales has not yet been approved, but would provide consistency in forecasting data to the benefit of the labour market, employers and providers involved.</p>

RECOMMENDATIONS

REF	RECOMMENDATION	UPDATE ON PROGRESS
2016-4	Need a common baseline approach to skills and employment brokerage that can be then added to with bespoke needs and requirements as driver by the primary contractor/ project owner for all applicable regional transformational projects	<p>The model led by the RSP, in collaboration with partners including DWP, Careers Wales, and primary contractors at the HMP Berwyn project in Wrexham has demonstrated how successfully a transparent and flexible brokerage service can work effectively on large scale projects.</p> <p>The RSP and partners' model at Wrexham provided the key contribution to the National Construction Excellence Wales Award for 'Leadership & People Development' in 2016.</p> <p>This model is now being deployed on Anglesey to support the Wylfa Newydd project and associated Energy projects within the region, building on the baseline of success from Wrexham with additional bespoke requirements for Wylfa.</p> <p>This will be further supported by the imminent launch of the online professional employment tool for North Wales - CYFLE - which builds considerably on the previous 'Shaping the Future' project, into a resource that will provide for the first time, a benchmark of current and future skills across North Wales.</p>
2016-5	Develop a complementary North Wales approach to STEM that will help communicate, inspire and promote equality of opportunity, whilst clearly reflecting and supporting the needs of employers, learners, and providers at all levels	<p>The proposal in the 2016 to recruit a dedicated STEM Coordinator to work as part of the RSP/NWEAB has still to be actioned due to lack of funding.</p> <p>Following on from the RSP undertaking a full audit and analysis of STEM provision across all schools in North Wales, the ACT ON STEM programme was created and delivered in 2016/17. Led by employers in partnership with providers and projects such as Reaching Wider, a full suite of resources for Yrs 5&6 pupils, their teachers and parents, aligned to each of the RSP regional key and growth sectors has been developed and deployed to all 369 primary schools in North Wales, and features nationally on the Welsh Govt. "Hwb". Its launch was also televised via S4C to further raise awareness.</p>
2016-6	Work with regional employers and their representative bodies to develop a "North Wales Toolkit of Employability Skills" that would award an accredited single certification, collectively on behalf of regional providers. Successful completion of the toolkit by participants would assist their meeting agreed labour market expectations and future employer demands within our key and growth sectors.	<p>A Task & Finish Group has been formed and already met twice, with an initial audit of support and expectations captured regionally. The group is now awaiting further guidance from Welsh Government on its new Employability Policy and Plan, following a successful joint seminar in the region held early in 2017, to identify input from North Wales into the national developments, and how we can then formulate regional and local approaches to complement and support Welsh Government.</p> <p>Key message from North Wales colleagues is to keep any criteria for outcomes on employability simple and relevant to the needs of employers and the region.</p>



REF	RECOMMENDATION	UPDATE ON PROGRESS
2016-7	Working with partners to consider appropriate sustainability and continuity of regional and national survey of employer views and needs following UKCES and its outputs being disbanded to help inform planning of future skills delivery in North Wales	<p>No progress in 2016-17 due to resource and capacity issues from having to focus on other projects and delivery outputs for the RSP.</p> <p>It will continue to be a key recommendation for 2017-18 with a draft paper and suggested action plan to be presented to RSP partners by December 2017</p>
2016-8	To realise the impact and relevance of cross-cutting themes in relation to the Welsh Language and its relevance and impact on the wider skills and employment agenda within North Wales	<p>We were the only RSP in Wales in 2016 to produce a dedicated appendix to our Regional Skills Plan on the importance of the Welsh Language.</p> <p>We have also worked with national partner – Colegau Cymru – and hosted an event with employers from across North Wales to promote best practice on the use of the language within the workplace and to promote associated skills and employment opportunities using Welsh.</p>
2016-9	Develop a cross-border skills manifesto built around a single cross border careers agency to promote the fluidity of skills and expertise that migrates between North Wales and North West England daily, for both employment and learning.	<p>Ongoing collaboration with cross-border partners on understanding the nature of the challenges involved – particularly with the Apprenticeship Levy.</p> <p>RSP colleagues continue to work with partners on cross-border skills issues, and has included addressing the North Wales and Mersey Dee All-Party Parliamentary Group in Westminster, and undertaking an analysis with partners, on HE qualifications cross-border aligned economic sector priorities for both North Wales, and Cheshire & Warrington LEP.</p>
2016-10	Continue to increase collaboration and information sharing with other workstreams within the NWEAB to illustrate and promote a joined up approach to education providers, employers and students.	Each of the NWEAB Programme Managers continues to meet regularly outside of formal timetabled regional partner meetings, to share information and intelligence that assists each of our own workstreams and collectively for the region, particularly in the work supporting the developing of the North Wales Growth Bid. This collaboration will continue and develop across skills, European funding, supply chains and infrastructure amongst other themes.

RECOMMENDATIONS

REF	RECOMMENDATION	PROCESS	DELIVERY TARGET
2017-1	Continue to work with employers, developers and providers supporting key transformational projects within each of the key and growth sectors in the region, to deliver the necessary facilities to create aspiration, and equip local with the knowledge, skills and aptitudes so that they can gain employment in the upcoming developments.	<p>The RSP to continue to be a central regional point of support to share and discuss opportunities for collaboration and innovation amongst partners in light of continued developments within providers, as a response to transformational projects and other developments across North Wales and cross-border areas.</p> <p>The North Wales Growth Bid will correlate with the similar document being developed by the Cheshire & Warrington LEP to make sure there is correlation and synergy around skills, employment, and support for projects where there are no sectoral or administrative boundaries.</p>	Ongoing
2017-2	Continue a common baseline approach to skills and employment brokerage that can be then added to with bespoke needs and requirements as driver by the primary contractor/project owner for all applicable regional transformational projects (2016-4)	<p>Continuation of focus on the regional brokerage model led by the RSP with partners such as DWP, Careers Wales, HE, FE, and LA's first deployed at HMP Berwyn, and now in place with a duplicate model on Anglesey to support Wylfa Newydd and associated Energy projects within the region.</p> <p>This will be further supported by the imminent launch of the online professional employment tool for North Wales - CYFLE - which builds considerably on the previous 'Shaping the Future' project, into a resource that will provide for the first time, a benchmark of current and future skills across North Wales as we work with education partners as well as employers and the wider labour market across North Wales.</p>	<p>Ongoing</p> <p>Autumn 2017</p>
2017-3	Continue to initiate and support a complementary North Wales approach to STEM that will help communicate, inspire and promote equality of opportunity, whilst clearly reflecting and supporting the needs of employers, learners, and providers at all levels (2016-5)	<p>Develop a business case for funding to appoint a fixed term STEM coordinator to work as part of the RSP core team, on behalf of all applicable regional partners.</p> <p>Establish a regional STEM Working Group of the RSP, to focus on sharing of best practice, challenges, and innovation related to STEM in North Wales utilising the experience of key partners, and extending to MSParc and Techniquet Glyndwr amongst others. Aim to shape regional approach, and also align to, and inform Welsh Government Education STEM focus</p> <p>To review the success to date of ACT ON STEM, and identify opportunities to fund development for extension from Yrs 5&6, into secondary and Yrs 7&8 to extend the continuity of a regional pathway of support.</p> <p>To support the concentrations of STEM being developed such as that with AIRBUS and Coleg Cambria - to provide regional support for local tailored outputs</p>	<p>December 2017</p> <p>November 2017</p> <p>January 2018</p> <p>Ongoing</p>



REF	RECOMMENDATION	PROCESS	DELIVERY TARGET
2017-4	Continue to work with regional employers and their representative bodies to develop a “North Wales Toolkit of Employability Skills” (2016-6)	<p>With a regional working task & finish group already having met and shared information, this work currently on hold for the announcement from Welsh Government on their national Employability Delivery Plan, will reconvene to then assess the national proposals, and realign regional needs to complement and address gaps applicable to the economic and skills needs of North Wales and wider cross-border area.</p> <p>This will include a pilot project extending the “ACT ON” brand to the hospitality and tourism sectors working with the Anglesey Enterprise Zone Board to promote employability and retention of skills within this sector.</p>	Autumn 2017
2017-5	Work with partners to consider appropriate sustainability and continuity of regional and national survey of employer views and needs following UKCES and its outputs being disbanded to help inform planning of future skills delivery in North Wales (2016-7)	<p>Without capacity or resource to deliver during 2016-17, the regional landscape on skills and employment continues to evolve at a pace, particularly in light of the work on the North Wales Growth Bid.</p> <p>A draft paper will be developed and presented by December 2017 to the RSP for consultation and comment. Following any revisions, this will then be presented as a recommendation to the North Wales Economic Ambition Board in early 2018 for action and support.</p>	December 2017 onwards
2017-6	To continue to support and promote the Welsh language across all key and growth sectors, and its importance in cross cutting themes to support skills and employment at all levels (2016-8)	Building on the work within the dedicated appendices in the 2016 Regional Skills Plan, and joint employers focused events with Colegau Cymru promoting the language in the work environment, we will continue to work with partners locally, regionally, and nationally, to further advance the benefits of having a bilingual workforce has for business.	Ongoing
2017-7	To monitor negotiations on BREXIT to further assess its impact on North Wales and the EU nationals currently working, studying, and living here, and their contributions to our skills and employment markets.	<p>With over 14,000 EU Nationals currently working in North Wales, and over 1,000 studying in the region, a continued monitoring of BREXIT negotiations in terms of its impact on skills will be undertaken via the RSP.</p> <p>Particular focus will be on the impact to education providers, as well as businesses within each of the key and growth sectors, alongside the foundation economy particularly, which cuts across many of our 8 spotlight sectors, who currently employ this cohort</p>	Ongoing
2018-8	Work with Third Sector partners across the region to undertake a full audit of all skills provision within this sector across North Wales, to publish a report to identify best practice, duplication, and areas for extension of provision.	Following the successful RSP led audit of provision reports for both STEM across North Wales in 2015, and 16-24 NEET provision in 2016, we will work with Third Sector partners to compile a definitive audit of all applicable skills provision delivered and offered across North Wales. This report will help to justify areas of existing best practice that need further support, in addition to potential areas of duplication which may not serve clients effectively currently, and also to highlight areas of innovation by the sector in delivery which can be extended.	April 2018

RECOMMENDATIONS

REF	RECOMMENDATION	PROCESS	DELIVERY TARGET
2017-9	Identify dedicated support for the Creative & Digital Sector within North Wales to work on behalf of sector representative organisation “Gogledd Creadigol / Creative North Wales” and the Regional Skills Partnership	<p>Following the inclusion of the Creative & Digital Sector as a growth sector within the 2016 Skills Plan, and the focus on the sector within the Growth Vision for North Wales to further raise aspirations and higher level skills across the region, there is a need to identify a dedicated support on skills and employment opportunities.</p> <p>Aligning to Welsh Governments focus on a “Cultural Corridor” for North Wales as announced by the Cabinet Secretary for Economy & Infrastructure, the post would bring together the creative and digital aspects together to identify areas of strength, opportunity, and gaps to be addressed. This would support the national, regional and local agenda for employers, providers as well as students by promoting skills & apprenticeships, and greater cluster developments and cooperation.</p>	April 2018
2017-10	Identify how the region can further support the Welsh Government Apprenticeship Policy by developing a North Wales complementary and coordinated approach to the promotion of apprenticeships across schools.	<p>Currently the promotion of apprenticeships within schools is piecemeal and ad-hoc across North Wales, and provides a challenge should the region look to contribute consistently to the Welsh Government target of upto 100,000 new higher level apprenticeship during the term of the current Assembly.</p> <p>Building on the current examples of best practice by individual employers and providers within the region, we need to identify an appropriate regional mechanism via the Regional Skills Partnership that champions a consistent approach supported by all, to benefit the many – with tailored information for parents, as well as pupils.</p> <p>Additional support for teachers in schools on better appreciating the benefit of pathways into apprenticeships and their contribution to the regional key and growth economic sectors, should be developed in collaboration between the regional schools education consortia (GwE), employers, and the Regional Skills Partnership members.</p>	February 2018