FOREWORD

We are pleased to introduce this first Skills Evidence Base for Greater Essex, which provides an overview of local skills demand – now and in the future. This has been produced through a combination of published data and statistics, local business feedback and planned future developments. It illustrates significant challenges and opportunities for Greater Essex, which together we need to respond to.

The overwhelming feedback from local businesses is that we are experiencing skills shortages and recruitment challenges at a time when youth unemployment is high. We need to make sure that our young people are properly equipped for future careers. Whilst many colleges and providers are responding to industry need, there is a clear mismatch between what we as employers need and the training on offer. A fractured skills system, often lacking industry relevant government funding incentives is hindering rather than helping our young people, local economy and future growth.

The Essex Employment and Skills Board has been set up to bring about change. We have come together as a representative group of large employers, SMEs, Business membership groups, colleges, universities and local government to look at collaborative solutions; we want to build on successful work to build a local skills offer which we can be truly proud of and which stands out nationally. With so many local partners signed up and committed to change we have a real and unique opportunity to make a difference.

The information contained in this document is an overview. Detailed information on sectors and local areas is available at [http://employment-and-skills-board.essexpartnership.org](http://employment-and-skills-board.essexpartnership.org) where you can also give your feedback. We would like to thank the wide range of partner organisations that have already contributed to this and we look forward to working with you to deliver change. Following are five key messages overall which have emerged to date:

**Five key messages from local businesses:**

- All Careers information (including school / further education support) needs to improve and better reflect the local economy to enable young people to make informed future choices
- The image of a number of growth sectors is hindering recruitment and contributing to gender imbalance (e.g. women in engineering, men in care) causing acute skills shortages and stifling innovation
- Employers wish to see non-technical skills (such as leadership, management, employability and soft skills) incorporated into training and education given that they are equally important to their growth and competitiveness as technical skills
- In addition to a lack of industry relevance, employers have highlighted gaps in vocational provision at pre and post apprenticeship levels. This is creating a barrier to some young people accessing provision and employment.
- Local training provision needs to be more responsive and flexible to respond to business needs, which should be at the core of funding, planning and the development of training and course provision within post 16 education.

Suzanne Jude, (Raytheon) Chair of Essex Employment & Skills Board
Tim Price (Park City Consulting), Vice Chair of Essex Employment & Skills Board
BACKGROUND

To inform and support a skills system which is truly employer responsive, a robust and comprehensive Evidence Base is required, to accurately describe current and future skills and employment needs for Greater Essex. Although a great deal of skills information already exists, even at national level this tends to be disparate and has never been gathered or interpreted at a detailed local level. This has led to a fragmented picture of local skills and employment needs and a skills system which is not always responsive and not creating viable opportunities for young people. This is echoed by local businesses. Therefore, through the Community Budgets initiative, partners have produced:

- 14 Local Skills Profiles covering all district, borough and unitary areas in Greater Essex
- 20 Sector Skills Profiles, outlining sectors at a local level including vacancies, salary levels, companies, skills need and future growth
- 2 Special Skills Reports on the low carbon sector and Skills Survey feedback from Essex companies (see page 11 for the full list of sector and local profiles)

THE CONTEXT

Evidence of an unresponsive skills system both locally and nationally is overwhelming; a wide range of business and public sector representatives are speaking out about this issue:

- ‘Teenager’s career aspirations do not match the demands of the job market’
  Education and Employers Taskforce
- ‘Skewed training system failing young people’
  Local Government Association Hidden Talents Report
- ‘When employers do engage with the external skills system, they look for provision responsive to their needs.’
  Confederation of British Industry
- ‘In the UK, skilled trades roles are the most difficult to fill in 2013’
  ManpowerGroup Talent shortage Survey
- ‘Institute of Directors research shows in stark clarity that a significant proportion of businesses is being held back by a lack of skills’
  Institute of Directors
- ‘Careers advice failing schools says Ofsted’
  BBC news report on Ofsted review of Careers in schools
- ‘Colleges and skills providers are not incentivised to deliver the skills that employers demand’
  Essex Employment and Skills Board
- ‘Young adults in England scored among the lowest results in the industrialised world in literacy and numeracy tests’. 
  Organisation for Economic Co-operation and Development (OECD)

THE NATIONAL AND GLOBAL PICTURE

Globally, the OECD report on numeracy and literacy highlights an increasingly competitive skills environment (England was 22nd for literacy and 21st for numeracy out of 24 countries for 16-24 year olds, behind Estonia, South Korea, Poland, Spain and Czech Republic). This means that we are competing with economies with higher skills and the OECD states that the stock of skills here is “bound to decline over the next decades unless significant action is taken” and that strong links between employers and education are necessary.

The British Council report ‘The Global Skills Gap’ surveyed business leaders and found that ‘three-quarters of businesses think we are in danger of being left behind by emerging countries unless young people learn to think more globally’. This has implications not only for young people but for the competitiveness of our economy. Added to this are well documented challenges with recovery from recession and competing with countries such as China and India on cost. If we are to build on strengths such as the UK manufacturing, engineering, IT and creative sectors, we require a responsive skills system.
Nationally, a range of evidence highlights skills shortages now and in the future. With youth unemployment high at the same time as many employers reporting skills shortages and recruitment difficulties, there is a clear mismatch.

Across findings certain skills have been highlighted frequently as facing shortages (echoed by Essex findings):
- Technical and practical
- Customer Service skills
- Leadership and management
- Written, oral and numeracy
- IT
- STEM Skills (Science, Technology, Engineering, Maths)

The Department for Business Innovation and Skills (BIS) Industrial Strategy outlines national priorities for growth and cites priorities as advanced manufacturing, ‘knowledge intensive traded services’ (including higher education and IT) and ‘enabling sectors’ such as energy and construction. These are in line with Essex key sectors.

Working Futures 2010-2020 is a national detailed projection of UK employment, productivity, labour supply and skills. This outlines that demand for skills measured by formal qualifications is projected to rise and occupations predicted to see the greatest rise are managers, directors and senior officials, professional and technical occupations. Care and service sectors are also predicted to see growth.

Institute of Directors report ‘ Shackled by the Skills Crunch’ outlines the ‘triple whammy’ facing companies in struggling to fill current vacancies, facing gaps in their current workforce and pressure to raise the skills bar higher to remain competitive globally.

The Confederation of British Industry Education and Skills Report 2013 outlines that businesses are more satisfied with private providers than Further Education colleges and assert that ‘the school to work transition is too haphazard’ and that ‘Improving Careers advice is key.’

The UK Border Agency produces a Government approved shortage occupation list outlining jobs for which there are currently shortages. Consistent with those above, these include a strong STEM theme (including geophysicist, radiotherapy physicist, civil engineers, mechanical engineers, electrical & electronics engineers, programmers, emergency medicine, specialist nurses, STEM teachers, social work, computer animators)

The National Employer Skills Survey is conducted by the UK Commission involving more than 74,000 interviews in England. Findings outlined that manufacturing, social and personal services were most likely to have hard to fill vacancies for skills related reasons. Among those who felt that education leavers were poorly prepared, a lack of working world/life experience or maturity was the most commonly cited reason.

Futureologists have pointed to factors such as an ageing population, addressing food shortages and continuing technological advances as key drivers for skills and employment in the future which could see innovations in health care for the elderly and innovative farming practices such as ‘vertical farming’ to maximise space. To keep up with such developments requires a forward thinking responsive skills system.

GREATER ESSEX NOW: KEY FACTS

(Please note that these are headlines only and greater detail is available in the 34 sector / area profiles)

A growing population: 1.7 million people live in Greater Essex, rising to 1.9 million by 2021

An ageing population: since 2003, over 65s increased by 18% compared with 5% of 16-64 year olds

Improving skills levels but which remain considerably below the national average
- 27% working age people have degree level skills+(Level 4) – 34% nationally
- 49% working age people have A ‘Level or equivalent+ (level 3) – 55% nationally
- 69% working age people have GCSE or equivalent + (level 2) – 72% nationally
- 85% working age people with skills level 1+ (pre GCSE) – 84% nationally
- 9% (101,500) working age people have no qualifications – 10% nationally

A strong business base with higher than average employees in manufacturing & construction
- 63,000 PAYE & VAT registered businesses, 90% with fewer than 10 employees
- High numbers of companies in construction, professional, scientific & technical
- Low numbers of companies in education, public admin, finance & agriculture
- High numbers of employees in retail, health, education & manufacturing
- Low numbers of employees in agriculture, utilities, property & motor trades
- The Essex economy generates a gross value added (GVA) of £30.1bn

High levels of out-commuting to high value jobs
- People working in Essex earn below the national average
- People living in Essex earn above the national average

Significant social and economic challenges
- Nearly 110,000 people on key out of work benefits
- Nearly 32,000 people claiming Job Seekers Allowance, nearly a third under 25

A sizeable education offer
- Greater Essex has over 520 Primary Schools and nearly 100 Secondary Schools
- Over 115 FE colleges or providers (from within and outside Essex) working with Essex residents
- FE Colleges have a predominantly vocational offering (67% in vocational courses) whilst school sixth forms have predominantly academic focus (85% in academic courses)
- Higher Education offerings including the University of Essex and Anglia Ruskin University, with plans for expansion across Greater Essex

Considerable future growth and opportunity
- Up to 50,000 new homes projected up to 2020
- Major developments including London Gateway (Tilbury), Harwich International Port, and Harlow Enterprise Zone
- Current and growing opportunities in sectors such as advanced manufacturing, construction, IT, health, care and creative sectors.
LOCAL BUSINESS FEEDBACK ON SKILLS

A survey has been undertaken to capture the skills needs of employers locally, many of which echo national evidence. There is very clear confirmation that local companies are facing skills shortages and barriers which is impeding their growth. The greatest number of respondents to date are from the advanced manufacturing and engineering sector, followed by creative, education and construction. 40% of respondents have 0-5 employees, reflecting the local small business base. Key findings to date are as follows:

SKILLS SHORTAGES

- Cross sector skills gaps include leadership & management, marketing, technical, literacy and numeracy skills.
- A third of companies find it ‘very hard’ to recruit people with leadership and technical expertise and nearly half (47%) of companies find it hard to recruit people with management skills.
- A third of companies find it hard to recruit people with numeracy skills, with one respondent flagging up ‘shockingly poor literacy skills’. 56% of companies cited difficulties with softer skills such as work ethics.

RECRUITMENT SHORTAGES

- Among specific job roles that are difficult to recruit to are engineers, technical skills, supervisors and project managers with one company even feeding back that they have ‘given up trying.’
- 45% of companies find it difficult to recruit people with research & analysis skills.
- Recruiting people with specialist industry related qualifications is proving a key issue for 31% of respondents followed by lack of work related qualifications is proving a key issue for 31% of respondents followed by lack of work experience (22%), apprentices (12%) and graduates (11%).
- Over half of respondents (56%) have to go outside Essex to recruit including to London for 31% of respondents followed by lack of work experience (22%), apprentices (12%) and graduates (11%).
- Where facing recruitment shortages, employers’ individual feedback ranged from lack of experience, transport barriers, cost of living, ageing workforce and a lack of relevance of apprenticeships.
- Employers who do not employ graduates, apprentices or interns have said this is due to lack of industry relevance in courses, no suitable candidates, costs, work experience and training time.
- Over half of respondents said that sector related degree courses do not meet the needs of their company.
- Over half of respondents also said that sector related FE courses do not meet the needs of their company.
- Reasons for courses not meeting the company needs include lack of practical and technical content, out of date courses and an absence of soft skills.
- A common theme in feedback is the lack of employability and softer skills included in training.

POTENTIAL SOLUTIONS

When asked about what actions could be taken by Government and partners to resolve skills issues:
- 31% - there needs to be more emphasis on practical and vocational skills.
- 29% - would like it to be cheaper and easier for employers to deliver training.
- 26% - apprenticeships need to be easier and cheaper.
Greater Essex 2014-2020

The following pages include summaries of local sector profiles compiled from national and local data and local business feedback. The summaries focus on headline information. More detailed versions of the sector profiles are available at ESB website address [http://employment-and-skills-board.essexpartnership.org](http://employment-and-skills-board.essexpartnership.org)

**Priority Sectors**
*(based on growth and current and future skills shortages)*

- Construction
- Advanced Manufacturing
- Health
- Care
- Creative
- IT & Technology
- Logistics

**Additionally, Profiles Have Been Produced For The Following Sectors:**
*(or will be added by the end of the year)*

- Building Services
- Chemicals, Pharmaceuticals, Nuclear, oil & gas
- Education
- Energy & Utility
- Facilities Management
- Finance
- Food and drink
- Business Survey full report
- Low Carbon special report
- Vacancies across Greater Essex
- Hospitality, Travel & Tourism
- Justice
- Land, agriculture, animal care
- Retail motor
- Sport

**Profiles Of Greater Essex District, Borough And Unitary Are Also Available At ESB Website Address Covering:**

- Basildon
- Braintree
- Brentwood
- Castle Point
- Chelmsford
- Colchester
- Epping Forest
- Harlow
- Maldon
- Rochford
- Southend
- Tendring
- Thurrock
- Uttlesford

**The Future - Challenges and Opportunities**

- 23% - the content of sector related courses in Further Education colleges needs to improve
- 25% - the image and profile of the sector needs to improve
- 23% - improve the school curriculum
- 9% - Improve sector related degree content

- Additionally, lack of locally available relevant qualifications, experience, and skills shortages are flagged up
- Companies see skills and recruitment as key challenges as well as staff recruitment, business survival and an ageing workforce
- Many companies cite opportunities for growth (including airports & ports) and new contracts
- There are clearly opportunities for future, with many companies outlining new staff requirements over the next 2-3 years across a range of job roles.

**Have Your Say - It is not too late to tell us about your skills needs and issues at [www.essexinsight.org.uk/consultations](http://www.essexinsight.org.uk/consultations) (select ‘Greater Essex Skills Survey’ from ‘Available surveys’).**

**Reasons Include:**

- Competition and increased wages in other areas – skills shortages driving costs up
- 64% of companies do not feel positive about recruiting suitably qualified staff from Essex in future

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CONSTRUCTION

Employs nearly 40,000 people locally in over 11,000 companies
Employers Include: Countryside Properties, Keepmoat, Higgins Construction, Kier Group Plc, Anderson Group, Brennan Group, Ej Taylor & Sons, Hutton Construction Ltd, Cadman Group

NATIONAL HEADLINES

- ‘Following the recession employment in construction is expected to level out and there will be a gradual return to growth’
- Ageing workforce impacting on skills
- Compliance with regulations requiring new skills
- Meeting the requirements of the Green Deal and Low carbon agenda / significant housing growth
- Future jobs in demand: construction managers, labourers, plant operatives, bricklayers, floorers, glaziers, civil engineers

LOCAL AND REGIONAL HEADLINES

- Construction output in the East of England projected to rise at 1.2% per year to 2017
- The East of England’s annual recruitment requirement (ARR) for the 2013-2017 period is 5,820, equivalent to 2.3% of base 2013 employment, substantially above the UK average of 1.2%.
- Largest recruitment requirement is forecast to be for floorers and plant operatives
- Current recruitment challenges for Essex construction companies include leadership and technical expertise
- Some local construction companies are experiencing difficulties in recruiting apprentices
- The sector has an ageing workforce which is impacting upon future growth
ADVANCED MANUFACTURING AND ENGINEERING

Employs nearly 40,000 people locally in over 4,000 companies


NATIONAL HEADLINES

‘Nationally, 82,000 engineers, scientists and technologists need to be recruited and trained by 2017’

- Expected net requirement for 120,000 jobs (mature engineering), 86,000 leading edge technology, 25,000 science industries
- Future jobs in demand include production engineers, CNC experienced workforce, airworthiness competence and management apprentices
- A range of engineering roles are already on the national shortage occupation list including mechanical engineers, electrical engineers, electronics engineers, design & development engineers, production & process engineers
- Ageing workforce; 60+ workforce (12%), 16-24 (7%)

LOCAL AND REGIONAL HEADLINES

- Regionally, 16% of technical workforce aged 60 plus. Projected recruitment (2011-2016) 6,700 technical engineering, 13,500 across all occupations
- For engineering workforce to compete globally, almost half those in technical roles (32,000) require up skilling
- Greater Essex companies are reporting technical expertise, research and analysis difficult to recruit to
- Greater Essex companies cite the poor image and school curriculum of the sector contributes greatly to skills shortages
- Local FE Courses and degrees are not seen as meeting needs particularly regarding practical elements

KEY DRIVERS FOR FUTURE EMPLOYMENT AND SKILLS

- Local companies have reported a rebalancing of production in the UK as it becomes more cost effective than China
- Local companies acknowledge gaps in leadership and management and marketing of the company
- Emerging technologies (low carbon, renewable energy supply chain, composites, printed electronics etc).

KEY CHALLENGES AND OPPORTUNITIES

- There is a negative perception of the sector which is hindering recruitment; therefore there is a need to engage more widely with schools, young people and parents
- Women are underrepresented within the industry, contributing to acute skills shortages and stifling innovation.
- Engineering and manufacturing has one of the lowest number of enrolments in school / college where available
- Engineering and manufacturing has one of the lowest numbers of enrolments in school / colleges, exacerbating the challenge caused by an ageing workforce
- Many businesses find it difficult to recruit higher level skills (e.g. Level 4+ engineers in electronics/software) this is compounded by the lack of higher level skills provision within Essex
- HR, Business and employability skills are as important to the sector as core STEM skills

HEALTH

Employs over 40,000 people locally, predominately in the NHS plus over 1,500 companies

Employers include: Southend University Hospital Nhs Trust, Mid Essex Hospital, Braintree Community Hospital, Cambian Ltd, Linden Centre, The Derwent Centre, Epping Physiotherapy Clinic, East Essex Dental Laboratory Ltd

NATIONAL HEADLINES

- One of the largest sectors of employment in the UK
- An older than average workforce which many do not join until their 20s or 30s
- From 2007-2017 the largest requirements are projected to be in caring personal services occupations (nursery nurses, nursery auxiliaries) at 16,000, followed by nurses, therapists and midwives at 22,000
- Medical practitioners, radiographers and nurses are on the national shortage occupation list
- Enrolments on ‘health, public services & care’ courses do not reflect the size opportunity the sector represents
- The Health Sector across the East of England is predicted to grow by 26,000 people between 2007 and 2017
- Across Essex, the sector is one of the top 5 sectors in terms of Job Centre Plus vacancies

KEY DRIVERS FOR FUTURE EMPLOYMENT AND SKILLS

- Continued and increasing pressure on services resulting from growing and ageing population and tighter budgets
- Increased demand for higher treatment rates as effectiveness increases, i.e. 30 years ago there were only a few hundred people alive with end stage renal failure, now there are over 80,000. New concerns such as obesity and alcohol misuse
- Ageing workforce with potentially greater incentives / flexibility for younger recruits in the private sector
- The sector offers good routes into a career from entry level jobs
- Based on vacancies, the sector has continued recruitment difficulties locally
- The sector is not appealing to males or young people based on the make-up of the currently workforce
- The sector offers good routes from lower level occupations which can offer a springboard to higher skilled jobs. However, these are not always clear to young people

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CARE

Employs over 37,000 people locally.

Employers Include: London Care Plc, Acorn Villages Ltd, Care Uk, Carewatch, Caring Direct Ltd, Ashlyns Residential Care Homes, Knightswood Day Centre, Kiddi Caru Day Nursery, Busy Bees Day Nursery

NATIONAL HEADLINES

• Most of the workforce is female (1 in 10 UK females work in the sector)
• Third most likely sector to employ young people (after education, hospitality, sport and leisure)
• Covers range of services through all stages of life – i.e. childcare, social workers, care for the elderly
• Nearly 8,000 additional workers will be needed each year to meet the increase in demand for services to 2020 in addition to 90,000 a year needed to replace existing workers
• Social Workers are on the national shortage occupation list

LOCAL AND REGIONAL HEADLINES

• Essex has the 2nd highest oldest population in Europe, meaning higher requirements for care workers than elsewhere
• The highest numbers in Essex last year were for care workers, social workers and nursery nurses
• Due to relatively low salaries, care employers are more likely to report difficulties in staff retention than average
• Short-term contracts and a poor perception of the sector are cited as barriers to recruitment for the sector
• Essex will need 30,000 staff to meet rise in demand resulting from the ageing population

KEY DRIVERS FOR FUTURE EMPLOYMENT AND SKILLS

• Ageing population Greater Essex has over 320,000 people aged 65+, projected to increase
• Growth in overall population requiring growth in workforce generally
• Potential changes and innovations in practices (i.e. moving from residential to home based care)
• Raising standards across the sector

KEY CHALLENGES AND OPPORTUNITIES

• Parts of the sector are less appealing to young people (i.e. nursery working chosen over care homes)
• The sector offers good routes from lower level occupations which can offer a springboard to higher skilled jobs. However, these are not always clear to young people
• Skills shortages are likely to be exacerbated by a low proportion of males working in the sector and a growing population
• Current high vacancy levels suggest that demand is not currently being met
• Current enrolments on relevant training do not reflect the growing size and opportunity this sector represents – charts on final pages

CREATIVE

Employs over 25,000 people locally, in nearly 7,000 companies

Employers Include: Barnes & Maunde Digital Media, Firstsite, STORM Creative Media, Coast Digital, Adphonic, Knight International, Chelmsford Civic Theatre, Royal Opera House

NATIONAL HEADLINES

• One of the greatest technology enabled sectors which has opened up new markets, products, services, employment opportunities and skills needs.
• Employs over 1.9 million people with a net output of £92 billion (2010)
• The UK’s digital technology sector is ranked 6th in the world in terms of its competitiveness
• Computer animators, dancers, orchestral musicians, visual effects roles and Graphic Designers are on the national shortage occupation list
• The sector was one of the fastest to recover following the 1990s recession and is expected to grow faster than other sectors in the coming decade
• Employment projections for the sector as a whole indicate a growing need for high level skills including over 300,000 more managers, professionals and associate professional occupations technical skills too as well as managers, professionals and associate professionals.

LOCAL AND REGIONAL HEADLINES

• Essex represents the third largest creative sector in the UK, generating £2640 million in sales in the last year.
• Growth areas are in Music and Visual and Performing Arts, Design, Advertising, Publishing and Architecture
• There is a nationally significant cluster of creative employers in more technologically developing areas of Software and Electronic Publishing and Digital and Entertainment Media

KEY DRIVERS FOR FUTURE EMPLOYMENT AND SKILLS

• Keeping pace with fast moving and changing technology is crucial
• The UK has the largest creative sector in Europe and is a global competitor. Strong skills will be essential to maintain this.
• Whilst there are good numbers of entrants to the sector, the industry cites skills shortages indicating that entrants are not appropriately skilled

KEY CHALLENGES AND OPPORTUNITIES

• Industry and education need to work more closely to develop more appropriate provision
• Employers would like to see more females working in the sector and engaged in activity such as work experience and internships
• There are low numbers of apprenticeships being delivered in this sector.
• Companies have fed back that courses currently on offer lack relevance to the workplace
• Support is necessary for start-ups and creative spaces
• The workforce needs to become more diverse and routes such as industry appropriate apprenticeships would help generate a greater pool of talent
IT & TECHNOLOGY

**Employs over 11,000 people locally, in nearly 4,000 companies**
Employers Include: Oakley Integrated Business Solutions, Objective IT, Xchanging, Eurobase Systems Ltd, Yellowspring, Accentra, Technologies Ltd, Banctec Ltd, Safety Critical Communications Ltd

**NATIONAL HEADLINES**
- The UK’s IT & Telecoms industries produced an annual GVA of £51.9 billion; over 5% of the total UK economy (2009)
- Recruiting Programmers is a key challenge for many businesses
- The previously un-assessed economic contribution of the internet is now said to be worth an estimated £100 billion to the UK economy
- Optimisation of ICT by businesses could generate an additional £47 billion GVA in the UK and could translate into half a million jobs over the next 5 – 7 years
- Skills shortages were most often cited by recruiters seeking to fill positions for Programmers/Software Developers and Web Design/Development professionals (2012)

**LOCAL AND REGIONAL HEADLINES**
- Regionally, IT & Telecoms contributes 9% of GVA and employs 1 in every 20 people regionally
- Across Essex, the greatest numbers of vacancies have been for IT Business Analysts and Systems Designers followed by programmers and software development professionals. IT operations and support technicians are also in fairly high demand
- Local companies have reported a lack of practical and technical skills of applicants. Leadership and project management skills have also been difficult to find.

**KEY DRIVERS FOR FUTURE EMPLOYMENT AND SKILLS**
- Nationally, there is a need for an average of 129,000 new entrants per year into IT & Telecoms professional job role. Nearly 23,000 are expected to come through education
- This sector shows a continuing trend towards being more highly qualified with the higher levels (QCF 4-8) rising to around 60 per cent by 2020.
- Keeping pace with new technologies is crucial, with Cloud Computing, Big Data, Green IT, Social & Mobile Computing.

**KEY CHALLENGES AND OPPORTUNITIES**
- Enrolments on ICT courses look sufficient but are clearly not meeting the needs of the sector and lack appropriate technical elements and relevance to the workplace
- Industry and education need to work more closely to develop more appropriate provision and activity such as work experience and internships
- Training and education need to keep up to speed with new technologies and advances in the sector which is fast paced (i.e. industry awareness days/training)
- IT underpins growth across all sectors of the economy, optimisation of IT by all types of businesses is key to local economic growth and competition
- Delivery of Higher Apprenticeships in IT are needed to respond to employer need for higher level technical skill
- Formal and informal support is crucial including extended schools activities, teacher industry training, Computers at School and Code Clubs, tech jams and other community learning

LOGISTICS

**Employs over 35,000 people locally, in nearly 3,000 companies**
Employers Include: Port of Tilbury Ltd, Manchester Airport Group (London Stansted Airport), DSV, Tilbury Container Services, Uniserve, DP World, Harwich International Port Limited, Stobart Air, Servisair Cargo

**NATIONAL HEADLINES**
- Worth over £93bn nationally, employing 2.3 million people in 196,000 companies
- The industry has suffered from major skills shortages, particularly HGV drivers though this is improving
- A survey of over 100 senior executives in the UK’s logistics sector has identified a significant increase in confidence in growth throughout the first half of 2013
- Lack of skilled entrants to the sector is seen as hindering its growth. The image of the sector is seen as a barrier

**LOCAL AND REGIONAL HEADLINES**
- In Greater Essex, Ports and Logistics account for 2.3% of total jobs and major opportunities expected from the London Gateway predicted to create 12,000 new jobs (Thurrock).
- Major local employers include Southend Airport, Stansted Airport, and Tilbury Port and key locations are Thurrock, Southend, Stansted and Harwich.
- Vacancies are most prevalent in Thurrock, Southend and Luttsesford reflecting the presence of the Ports and Airports there. Current Essex vacancies include van drivers, transport & distribution assistants and LGV drivers

**KEY DRIVERS FOR FUTURE EMPLOYMENT AND SKILLS**
- Nationally, Working Futures III projects that 843,600 additional workers will be required to work in the sector by 2017 including managers, customer service positions and transport & machine operatives
- The Driver Certificate of Professional Competence (CPC) legislation will have a massive impact on the Logistics Sector as over 300,000 professional drivers, in vehicles over 3.5 tonnes, are required to take the training in the next five years
- Major developments including London Gateway (12,000 jobs) (Tilbury), Harwich International Port, potential growth at Southend and Stansted Airport
- Local companies cited future job roles in this sector including air worthiness apprenticeships and skills and drivers

**KEY CHALLENGES AND OPPORTUNITIES**
- There are low numbers of learners on Logistics apprenticeships and not all relevant frameworks are offered locally (e.g. supply chain management).
- There is a lack of higher level training (Level 4+) available locally
- Employers have highlighted that the sector needs to be conveyed as a career of choice rather than something people ‘fall into’
- Awareness of roles within logistics and aviation is lacking and needs to be reflected in careers information
- Employers have fed back a growing need for leadership and management skills
The primary purpose of this Evidence Base has been to provide clarity and consensus on the current and future skills needs of employers across all sectors in order to help shape vocational provision. This will ensure that the Greater Essex Economy can continue to grow and is supported by robust skills. Most importantly it ensures that young people are undertaking courses that prepare them for long-term future careers.

The information contained in the detailed profiles is already being utilised by local colleges and training providers and is helping to shape their provision. Alongside the development of the Evidence Base, a web portal is being developed which will allow greater join up between the needs of employers and local training. This portal will also enable the Evidence Base to grow and become more accurate and detailed through employer feedback.

In its production, it has also been clear that the Evidence Base can be utilised for other purposes including:

- Feeding into schools Careers Information and lesson plans to ensure that young people and teachers know about the local economy, jobs and skills needs. This will also help young people to make informed choices about their future.
- As a tool for lobbying Government in providing background to the skills challenges and barriers faced by Greater Essex employers which are limiting the future prospects of young people and the growth of our economy.

The Evidence Base represents a starting point, given the breadth of the information it contains. Developing a robust and responsive skills system is necessarily ongoing. It is recommended that there is an annual refresh of the core data (sector and area profiles) and on-going feedback and dialogue with companies through the Skills Business Survey (see section 4). Vacancy information will also be produced regularly on the web portal in order to provide a regular and consistent picture of employment and skills requirements across Greater Essex.

The Greater Essex Skills Evidence Base has been produced in partnership with a wide range of organisations, including national Sector Skills Councils and the Greater Essex Employment and Skills Board. Core development was via a Task and Finish Group with members from Essex County Council, the University of Essex, Essex Chambers of Commerce, Anglia Ruskin University, Ixion Holdings and Tendring District Council (representing local authorities). Particular thanks go to these organisations for their time and support with the project. Significant research and development was undertaken by University of Essex intern Elena-Carmen Nicoara, who we would like thank for her continued and extensive support with this project.

It must be noted that future projections are estimates only and should be viewed as indicators based on available data, intelligence and past trend. Whilst factual information has been used as much as possible, there are clearly factors which could impact upon growth and which we cannot predict as per the impact of the recession.

It should also be noted that a range of data sources have been used in compiling the Evidence Base. Not all sources used match exactly which may lead to some inconsistencies although these are generally minor.
Greater Essex VAT and PAYE Registered Companies 2012

Greater Essex has a slightly higher proportion of companies with 0-4 employees than the national average and less in the 100+ bracket. Nearly one in five companies is in construction (18%); significantly more than nationally (12%). Employee numbers largely reflect the top 50 companies, with the highest proportions in retail, wholesale & motor vehicle repair, health and social care, education and manufacturing.
CURRENT PARTICIPATION IN VOCATIONAL, INDUSTRY RELEVANT TRAINING
(16-18 YEAR OLDS)

Enrolments by Essex 16-18 yr olds residents on Further Education or School Sixth Form courses by type of course 2012/13

Enrolments by Essex 16-18 yr olds residents on Further Education courses by sector subject area 2012/13 (part year)

Enrolments by Essex 16-18 yr olds residents on School Sixth Form courses by sector subject area 2012/13 (part year)
Apprenticeships starts by 16-18 year old Essex residents by sector subject area 2012/13 (August - April)

- Science and Mathematics: 650
- Retail and Commercial Enterprise: 140
- Leisure, Travel and Tourism: 30
- Information and Communication Technology: 240
- Health, Public Services and Care: 450
- Engineering and Manufacturing Technologies: 60
- Education and Training: 120
- Construction, Planning and the Built Environment: 850
- Business, Administration and Law: 60
- Arts, Media and Publishing: 70
- Agriculture, Horticulture and Animal Care: 70
This information is issued by 
**Essex County Council and Essex Employment and Skills Board.**

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