



Replacement Local Development Plan 2018-2033

Background Paper

April 2019

BP 20: Skills Needs Assessment

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1.0 Introduction

- 1.1 Conwy County Borough Council [CCBC] appointed Lichfields to undertake a Skills Needs Assessment for the County in 2018. This follows on from earlier studies also undertaken by Lichfields on behalf of CCBC, including an Employment Land Review [ELR] and Growth Drivers Study.

Background and Scope of Work

- 1.2 CCBC's Economic Strategy 2017-2027 (2017) sets out the Council's ambition to "establish a dedicated Higher Education presence in the County". The Council are exploring the idea of a dedicated Higher Education provision in Conwy to help stimulate economic growth. CCBC hopes to explore whether such a proposal will attract new residents and students (from across the UK and internationally) to the area, and whether this would create demand for an evening economy and support local businesses to grow and innovate.
- 1.3 Currently, the majority of the Higher Education needs of Conwy's residents and businesses are provided elsewhere. The main providers of Higher Education in and in close proximity to North Wales comprise Bangor, Chester and Glyndŵr universities. Coleg Llandrillo (as part of Grŵp Llandrillo Menai) has a HE centre in Rhos-on-sea, situated within Conwy County, although it is predominantly a Further Education institution.
- 1.4 Conwy County therefore lacks a dedicated Higher Education facility or campus. The proposition is that such provision could help stimulate economic growth in the County by attracting new residents to the area, helping to stimulate demand for an evening economy, whilst also supporting local businesses to grow and innovate.
- 1.5 During the ELR work undertaken by Lichfields (which identified Conwy's future B-Class requirements for Conwy), it was apparent that North Wales' economy was likely to be significantly boosted across key growth sectors and by programmed development projects across the wider sub-region over the next few years.
- 1.6 This was examined further in the Conwy Employment Land Review Update (2019), which concluded that Conwy's economy is likely to benefit from the following key growth sectors and development projects:

1 Key growth sectors:

- a Energy & Environment;
- b Advanced Materials & Manufacturing;
- c Construction;
- d Creative & Digital;
- e Health & Social Care;
- f Tourism & Hospitality; and,
- g Food & Drinks.

2 Development projects:

- a Colwyn Bay Tidal Lagoon;
- b Deeside Advanced Manufacturing Institute;
- c Menai Science Park;

- d Orthios Eco Park and Energy Centre;
- e Parc Adfer; and,
- f Wrexham Energy Centre.

- 1.7 These key sectors and development projects are likely to generate significant demand for skills; however, there is limited localised evidence on the particular nature of these skills requirements and little robust evidence on the extent to which Conwy (and North Wales more generally) have the capacity to respond to this demand.
- 1.8 This report is intended to examine the skills needs likely to arise from these growth sectors and projects and assesses the fit with local skills currently available in Conwy. It is intended that this will help CCBC to capitalise on future economic growth opportunities and to help assess whether a case can be made for a new, dedicated, Higher Education presence in the County.
- 1.9 The scope of this report is therefore to assess the skill needs arising from the key growth sectors and development projects programmed for North Wales over the coming years, with a particular emphasis on how this aligns with the Higher Education courses currently available in the sub-region and whether new courses and HE facilities could be justified in Conwy.
- 1.10 This Assessment reviews existing documents including sector specific skills assessments, the Welsh Government's Skills Implementation Plan and the North Wales Regional Skills & Employment Plan. It also relies on primary data collection from Lichfields' consultations with key project developers and a survey of local businesses' skills needs.

Higher / Further Education Institutions

- 1.11 Lichfields has been joined on this project by The Mackinnon Partnership who are experts in labour market analysis involving education and employability. The Mackinnon Partnership has undertaken a comprehensive assessment of local skills provision, including consultation with local education providers including:
- Coleg Llandrillo – Conwy's further education provision is in the hands of Coleg Llandrillo, which is part of Grŵp Llandrillo Menai [GLM], Wales' largest further education institution. Coleg Llandrillo offers over 4,000 full and part-time courses, whilst the wider GLM has 23,000 students.
 - Bangor University – Bangor University has around 11,000 students currently studying at the university, with 650 teaching staff based within 23 Academic Schools.
 - Wrexham Glyndŵr University – Wrexham Glyndŵr University offers both undergraduate and postgraduate degrees, as well as professional courses. Wrexham Glyndŵr University had 6,415 students in 2016/17.
- 1.12 This report will include an analysis of current skills and training courses offered in Conwy County, and analysis of education statistics held by Higher Education Funding Council Wales, Statistics Wales and other agencies. A demographic assessment is also included in the report to highlight how the number of residents aged between 16-24 in Conwy is expected to change in the future.

Structure of the Report

- 1.13 The report is structured as follows:
- 1 Policy Context (Section 2.0): Reviewing existing documents on skills needs in Conwy County and North Wales;

- 2 Demographic and Skills Context (Section 3.0) – Analysing projected demographic changes for Conwy and North Wales more generally, assessing student retention rates;
- 3 Key Transformational Projects (Section 4.0) – this section focuses on the developers / stakeholders relevant to the seven development projects happening across North Wales to understand their current and future skills and labour requirements / demands;
- 4 Skills Needs Survey (Section 5.0) – Focuses on the Skills Needs Survey results which sought to understand current and future skill levels and demands;
- 5 Current Supply of Further and Higher Education skills in Conwy (Section 6.0) - Outlining the consultation undertaken with local education providers, skills representatives at the North Wales Economic Ambition Board and the Welsh Government;
- 6 Alignment between local skills supply and demand (Section 7.0) – this section sets out recommendations on where there are particular skills gaps and shortages that could be addressed in Conwy County and the wider region; and,
- 7 Overall Conclusions and Policy Implications (Section 8.0).

2.0 Context

Introduction

- 2.1 This section provides an overview of existing national and local documents on skills needs in Conwy County and North Wales, including those published by CCBC, the Welsh Government, the North Wales Economic Ambition Board and other sector-specific organisations.

National

Welsh Government Skills Implementation Plan

- 2.2 In 2014, the Welsh Government published the Skills Implementation Plan which highlighted the ambition to develop the skills system in Wales. The primary focus of the Plan was to raise productivity, reduce barriers into work and support people into sustainable employment¹.
- 2.3 This Skills Implementation Plan was developed to inform future action in relation to post-19 skills and employment policy. The aim of the plan was to provide details of the actions to be undertaken by the Welsh Government when working with employers, individuals, trade unions and delivery partners.
- 2.4 The Plan was underpinned by a series of Skills Performance Measures, which were to be used as a benchmark to evaluate the performance of the Welsh Government's policies and programmes. The Skills Performance Measures were based on four key areas:
- Jobs and growth;
 - Equality and equity;
 - Financial sustainability; and,
 - International skills benchmarking.
- 2.5 Furthermore, the Plan includes the Skills Gateway, which provides access to employment and skills support for individuals and employers.

Welsh Government Policy Statement on Skills

- 2.6 In 2014, the Welsh Government published a skills implementation plan (as set out above) with the aim of creating the right conditions for employers across Wales to thrive and prosper. The Statement sets out future policy actions which aim to enable and evolve Wales into a highly skilled nation with a strong focus on employment and skills. This covered four key areas:
- skills for jobs and growth;
 - skills that respond to local needs;
 - skills that employers value; and,
 - skills for employment.
- 2.7 The Policy Statement focused primarily on post-19 skills intervention and defined those activities that provided skills needed for employment through education and training. The wider implications of the statement focused on three broad areas:
- Literacy and numeracy skills;
 - Qualifications and curriculum pre-19; and,

¹ Welsh Government (2014): Skills Implementation Plan

- Higher-level skills.

2.8 The Statement builds on a number of key areas of policy development in relation to the skills system driven by the Welsh Government.

Sub-Regional

North Wales Economic Ambition Board Regional Skills & Employment Plan (2017)

2.9 In 2017, the North Wales Economic Ambition Board [NWEAB] published its adopted skills and employment plan for the region, and has been recognised by the Welsh Government as one of its three Regional Skills Partnerships. NWEAB coordinates delivery and support across the region, and ties in with the Board's other workstreams. The aim of the Plan is to:

"Improve and upgrade the region's skills base and provide employment growth, focusing particularly on improving the supply of advanced skills in the high value economy clusters and tackling worklessness. Employers in the region need to be supported to drive skills provision that responds to their needs, with our education system becoming more demand-led, and reflecting the priorities of employers and growth sectors in the curriculum."²

2.10 The workstream is a collaboration between public and private sector partners. It aligns the demand for skills and jobs generated by the region's business base as well as key growth opportunities in target sectors. These include:

- 1 Energy & Environment;
- 2 Advanced Materials & Manufacturing;
- 3 Construction;
- 4 Creative & Digital;
- 5 Health & Social Care;
- 6 Tourism & Hospitality; and,
- 7 Food & Drink.

2.11 The workstream aims to improve labour market accessibility and improve the supply of skills to better meet the needs of businesses. The workstream covers apprenticeships, further education, Higher Education, workplace learning, and has a particular focus of 'STEM' subjects (Science, Technology, Engineering, and Mathematics). This is expected to directly benefit Conwy's workforce and businesses and there are likely to be additional spill over effects from other parts of the region.

Local

CCBC Draft Economic Strategy 2017-2027 - Perfectly Placed for Business and Growth (2017)

2.12 CCBC's draft Economic Strategy sets out the Council's vision to grow Conwy's economy from 2017 to 2027. This sets out five ambitions:

- 1 To create state-of-the-art business premises to support growth and attract new businesses;
- 2 To actively attract head offices/ international bases into the county;
- 3 To establish a dedicated Higher Education presence in the county;

² North Wales Economic Ambition Board (2017) North Wales Regional Skills & Employment Plan

4 To develop a night time economy in Llandudno and a winter tourism offer across the County making Conwy a year-round visitor destination; and,

5 To facilitate the tidal lagoon and other renewable energy projects across the County.

2.13 Planning policy plays an important role in supporting these ambitions and in creating state-of-the-art business premises and attracting head offices / international bases to the county. Conwy's Economic Strategy is therefore expected to play a key role in shaping the County's future economic growth.

2.14 Ensuring that suitable employment sites are made available to businesses is vital to enable the development of new and high-quality business premises. Safeguarding the best quality business premises in the local planning process also plays an important role.³

2.15 Conwy's Economic Strategy points to the County's strategic sites and the potential they have to provide new state-of-the-art business premises such as Abergele South East. The Strategy aims to actively encourage head offices to locate in Conwy, which would help to create local high value and high skilled jobs, as well as help reduce outward migration of young people by providing graduate-level jobs in the locality.

Conwy Local Development Plan (adopted October 2013)

2.16 The Statutory Development Plan for CCBC is the Conwy Local Development Plan [LDP], which was adopted in October 2013. The LDP focuses on how new development will be managed in the County over the period 2007 to 2022.

2.17 Within the LDP, Strategic Policy EMP/1 focuses on B-Class employment land needs for the County. The Plan highlighted that higher value B-class space is vital to the economic vitality and growth of the County. Strategic Policy EMP/1 of the adopted LDP sets out an employment land requirement of 36 ha over the plan period.

2.18 Policy CFS/15 aims to support development proposals for new education facilities within the County. However, this policy focusses on primary and secondary schools and makes no mention of current or future Further or Higher Education provision within Conwy.

Supply Chain Programme

2.19 A Supply Chain Programme is being developed to support businesses across the North West region to benefit from new opportunities generated by the six transformational projects (as highlighted in coming to the region⁴). As well as holding workshops and generating awareness amongst local businesses, the programme is developing targeted support packages that will help businesses with specific niches or sectors to access opportunities.

2.20 The programme is in its early stages of development but is likely to have an emphasis on the Construction, Manufacturing and Energy sectors, so that it reflects the nature of key development projects in North Wales. Conwy will benefit from the Supply Chain Programme, although until plans are further developed it is uncertain to what extent the County's businesses will be able to capitalise on the support that will be offered.

³ Lichfields (November 2016) Invest to Grow – How Can Planning Support Inward Investment?
<http://lichfields.uk/content/insights/?article=invest-to-grow&archive>

⁴ North Wales Economic Ambition Board (2016) Key Projects <<http://www.northwaleseab.co.uk/supply-chains/key-projects/>>

3.0 Demographic and Skills Context

Introduction

3.1 This section establishes the demographic and skills context for Conwy County, highlighting key economic and education trends at County regional and national levels. This has been derived from published data and other information available taken primarily from Stats Wales and the Office for National Statistics [ONS].

Demographic

Population Estimates

3.2 According to the latest ONS Mid-Year Population Estimates [MYE], the population of Conwy was 116,863 in 2017, having increased by 2.7% over the 10-year period 2007 to 2017. This was slightly above the North Wales rate (2.5%), below the Welsh (4.0%) and UK (7.7%) rates⁵.

3.3 There was an overall fall (-2.2%) in the working age population between 2007 and 2017 in Conwy County. However, North Wales' was even more pronounced (-2.8%). In contrast, the Welsh and UK working age populations grew by 0.4% and 4.1% respectively over the past 10 years.

3.4 Over the past ten years, Conwy has experienced a fall of -3.8% in the number of residents aged 18-24 that is the most common beneficiary of Higher Education courses. This fall was also significantly lower than the North Wales (-0.7%), Welsh (1.4%) and UK rates (1.2%). These demographic changes mean that Conwy's labour force faces clear challenges as highlighted in Table 3.1, with fewer of Conwy's working and younger age population entering the workforce or Further/Higher Education.

Table 3.1 % Population Change between 2007 and 2017

Area	All Ages	Aged 16 to 64	Aged 18 to 24	Aged 65+
Anglesey	0.1%	-7.3%	-11.2%	24.5%
Conwy	2.7%	-2.2%	-3.8%	19.2%
Denbighshire	0.7%	-4.4%	-1.3%	17.7%
Flintshire	2.9%	-3.0%	-4.7%	31.4%
Gwynedd	3.6%	0.4%	18.8%	18.7%
Wrexham	3.3%	-2.5%	-10.7%	24.4%
North Wales	2.5%	-2.8%	-0.7%	22.6%
Wales	4.0%	0.4%	1.4%	21.4%
UK	7.7%	4.1%	1.2%	23.1%

Source: ONS Mid-Year Population Estimates (2018)

Population Projections

3.5 State Wales' 2014-based Sub-National Population Projections [SNPP] for Conwy County suggests that the overall population is set to rise to 116,717 between 2017 and 2039, representing a 1.7% increase (equating to 1,505 people).

3.6 As shown in Table 3.2, Conwy's resident population is anticipated to grow at a slower rate than the North Wales and Wales averages, which are projected to increase by 4.1% and 4.6% respectively between 2017 and 2039. Conwy's population is projected to peak at 118,611

⁵ ONS (2018): 2002-2017 Mid-Year Population Estimates

residents in 2032 before gradually declining slightly to 118,222 by 2039 as positive net inward migration is outweighed by negative net natural change.

Table 3.2 2014-based Sub-National Population Projections between 2017-2039

	2017	2039	2017-2039	2017-2039 (%)
Anglesey	70,176	68,348	-1,828	-2.6%
Gwynedd	123,299	132,585	9,286	8.4%
Conwy	116,717	118,222	1,505	1.7%
Denbighshire	95,336	97,326	1,990	2.7%
Flintshire	154,651	155,859	1,208	1.3%
Wrexham	138,536	149,976	11,440	9.7%
North Wales	698,716	722,317	23,601	4.1%
Wales	3,116,371	3,259,522	143,151	4.6%

Source: Stats Wales - 2014-based Sub-National Population Projections

- 3.7 Between 2017 and 2039, Conwy's working age population is projected to decrease significantly by 13.1% - across North Wales, only Anglesey is anticipated to experience a higher level of decline (-16.3%) than Conwy. Across the region, the working age population is expected to fall by 7.9%, which is again above the Welsh rate (-5.1%).

Table 3.3 2014-based SNPP Working Age Population between 2017-2039

	2017	2039	2017-2039	2017-2039 (%)
Anglesey	40,187	34,426	-5,761	-16.3%
Gwynedd	74,027	74,505	478	0.6%
Conwy	66,195	58,121	-8,074	-13.1%
Denbighshire	55,082	50,043	-5,038	-10.5%
Flintshire	93,708	82,965	-10,743	-12.7%
Wrexham	84,989	84,872	-117	-0.1%
North Wales	414,188	384,933	-29,255	-7.9%
Wales	1,911,971	1,814,767	-97,204	-5.1%

Source: Stats Wales: 2014-based Sub-National Population Projections

Commuting and Migration

- 3.8 Conwy's key travel to work patterns (based upon Census 2011 data) is summarised in Table 3.4. 38,279 Conwy residents live and work within the County (including 6,977 home workers). A total of 12,348 Conwy residents commute out of the County to employment opportunities elsewhere, whilst 7,408 non-residents travel into the County for work. Overall, this results in a net out-commute of 4,851.

Table 3.4 Travel to Work Patterns (Conwy)

	Conwy
Live and Work in LA	38,279
Home Workers	6,977
No Fixed Workplace	3,995
In-Commute	7,408
Out-Commute	12,348
Net Commuting Balance	-4,851

Source: Census 2011/Lichfields analysis

- 3.9 Table 3.5 provides an analysis of Conwy's key commuting flows by location of destination and origin. The data has been compiled at the local authority level. From the table it can be seen

that the strongest relationships are generally with those areas situated within North Wales. It can also be seen that, whilst Conwy is a net exporter of labour in overall terms, it acts as a net importer of labour in relation to Anglesey only.

Table 3.5 Conwy's Key Travel to Work Flows by Local Authority

	Number of People		
	Origin of In-Commuters to Conwy	Destination of Out-Commuters from Conwy	Conwy's Commuting Balance
Anglesey	761	417	+344
Denbighshire	3,332	5,407	-2,075
Gwynedd	1,520	2,373	-853
Flintshire	790	1,048	-258
Wrexham	269	349	-80
Cheshire West and Chester	139	409	-270
Liverpool	52	119	-67
Total	34,170	37,429	-3,259

Source: Census 2011/Lichfields' analysis

- 3.10 The ONS defines labour market areas as those areas in which the bulk of the resident population also work within the same area. Defining labour market areas requires an analysis of commuting patterns to identify Travel to Work Areas [TTWAs] for local economies. The current criteria is that generally at least 75% of an area's resident workforce work in the area and at least 75% of the people who work in the area also live in the area. The area must also have a working population of at least 3,500⁶.
- 3.11 Applying this methodology to the 2011 Census data indicates that Conwy's labour market area consists of: Conwy, Denbighshire and Gwynedd. Together, these locations comprise:
- The workplace for 89% of Conwy's resident workforce (35,087); and,
 - The place of residence for 93% of Conwy's total workplace population (32,159).
- 3.12 The 2011 Census commuting data is supported by the ONS job density data (which is defined as the number of filled jobs in an area divided by the number of working age resident in that area). Table 3.6 sets out job density figures for Conwy and comparator authorities which border Conwy and/or have some connection through migration and commuting.
- 3.13 As shown in Table 3.6, the job density figure for Conwy is 0.78⁷ which is slightly below the average of the comparator authorities. This demonstrates that there is a high level of inter-dependency between Conwy and surrounding local authorities, with slightly higher levels of out-commuting from Conwy to neighbouring authorities.

⁶<https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/articles/traveltoworkareaanalysinggreatbritain/2016>

⁷ ONS Job Density (2016)

Table 3.6 Job Density Comparison Areas (2016)

Local Authority	Job Density
Anglesey	0.67
Conwy	0.78
Denbighshire	0.81
Flintshire	0.88
Gwynedd	0.90
Wrexham	0.75
North Wales Average	0.80

Source: ONS Job Density (2016)

Economics and Skills

Labour Market

- 3.14 Conwy has a slightly lower economic activity rate of 76.9% compared to North Wales (78.6%) and Great Britain (78.2%), respectively. However, the County performs better in comparison to Wales as a whole (76.3%).
- 3.15 Conwy performs above the Welsh (35.1%) and North Wales (34.8%) rates regarding Higher Educational attainment levels, with 37.1% of residents holding NVO4 qualifications and above (i.e. HNC or higher). However, Conwy lags behind Great Britain's rate of 38.6%^a.

Table 3.7 Economic Activity Rates

Area	Economic Activity Rates (%)	NVO 4+ Qualifications (%)	No Qualifications (%)
Anglesey	79.4%	39.7%	7.5%
Conwy	76.9%	37.1%	5.9%
Denbighshire	75.6%	35.4%	7.6%
Flintshire	78.7%	28.3%	9.9%
Gwynedd	76.5%	36.5%	8.9%
Wrexham	83.1%	31.6%	7.1%
North Wales	78.6%	34.8%	7.8%
Wales	76.3%	35.1%	8.7%
Great Britain	78.2%	38.6%	7.7%

Source: ONS Annual Population Survey (July 2017 – June 2018) – Economic Activity Rates / (January 2017-December 2017) Qualification Levels

- 3.16 Conwy has the lowest proportion of residents with no qualifications (5.9%) compared to all North Wales authorities (7.8%), as well as Wales (8.7%) and Great Britain (7.7%) as a whole.
- 3.17 In terms of the number of occupations, 44.2% of Conwy's employees are employed in managerial, professional and technical occupations. Table 3.8 shows that this is above the North Wales (38.6%) and Welsh levels (40.8%), but below the Great Britain rate (45.9%). In contrast, 18.9% of Conwy residents are employed in the lowest-skilled occupations compared to

^a ONS annual population survey (July 2017 – June 2018)

the wider North Wales (19.0%) and Welsh (19.1%) rates; although this is above the rate for Great Britain (17.0%) as a whole.

Table 3.8 Employment by occupation (July 2017-June 2018)

	Soc 2010 Major Group 1-3*	Soc 2010 Major Group 8-9**
Anglesey	42.3%	16.8%
Conwy	44.2%	18.9%
Denbighshire	39.9%	18.5%
Flintshire	36.5%	23.3%
Gwynedd	39.5%	15.8%
Wrexham	40.8%	22.2%
North Wales	38.6%	19.0%
Wales	40.8%	19.1%
Great Britain	45.9%	17.0%

Source: ONS Annual Population Survey. Note: *Soc 2010 Major Group 1-3 includes: Managers, Directors and Senior Officials, Professional Occupations and Associate Professional & Technical occupations. **Soc 2010 Major Group 8-9 includes: Process Plant & Machine Operatives and Elementary Occupations

Unemployment

- 3.18 Between July 2017 and June 2018, unemployment levels for those aged 16 to 64+ in Conwy averaged 3.8%. This equates to 2,000 unemployed residents, which is lower than the overall unemployment rate for Wales (4.8%) but slightly higher than Great Britain's rate (4.2%)⁹.
- 3.19 Of the 590 residents currently claiming Job Seekers Allowance [JSA] in Conwy (October 2018), a total of 510 people (86.4%) were seeking work within the following occupations:
- 1 Sales and Customer Service occupations (60.2% of all Conwy County's JSA claimants - 355 people);
 - 2 Managers and Senior Officials (18.6% - 110 people); and,
 - 3 Elementary Occupations (7.6% - 45 people).¹⁰

Business Demography

Employment within Broad Sectors

- 3.20 The ONS's Business Register and Employment Survey (2017) indicates that Conwy had 43,000 employee jobs in 2016, an increase of 7.5% (equating to 3,000 employees) from 2012. In 2017, Conwy's largest employment sectors included health (16.2%), accommodation & food services (14.0%), education (10.5%) and retail (9.3%)¹¹.
- 3.21 Conwy has a higher proportion of employees based in sectors such as accommodation & food services, and arts, entertainment, recreation & other services compared to the regional and national rates. This is a testament to the strong tourism and hospitality and foods sector within the County. However, the proportion of workers within the manufacturing sector is significantly below all comparator areas.

⁹ ONS (2018) Annual Population Survey (July 2017-June 2018)

¹⁰ ONS (2018) Jobseeker Allowance by occupation (October 2018)

¹¹ ONS Business Register Employment Survey (2018)

Table 3.9 Level of employment within broad sectors in 2017

Sector	Level of employment in 2017 (% of all in employment)			
	Conwy	North Wales	Wales	Great Britain
Agriculture, forestry & fishing	1.4%	1.5%	1.1%	0.7%
Mining, quarrying & utilities	0.9%	1.8%	1.7%	1.3%
Manufacturing	2.9%	14.5%	11.1%	8.1%
Construction	4.7%	4.3%	4.2%	4.8%
Motor trades	1.9%	1.5%	1.5%	1.7%
Wholesale	1.6%	2.6%	2.3%	3.9%
Retail	11.6%	10.0%	10.1%	9.5%
Transport & storage (inc. postal)	2.9%	2.9%	3.2%	4.7%
Accommodation & food services	14.0%	9.0%	7.7%	7.4%
Information & communication	2.9%	3.5%	4.2%	4.3%
Financial & insurance	1.2%	1.0%	2.3%	3.5%
Property	1.2%	1.0%	1.2%	1.6%
Professional, scientific & technical	4.7%	5.1%	5.2%	8.4%
Business administration & support services	4.7%	6.2%	6.7%	9.1%
Public administration & defence	9.3%	6.2%	7.0%	4.3%
Education	10.5%	8.9%	9.8%	8.9%
Health	16.3%	15.8%	16.0%	13.2%
Arts, entertainment, recreation & other services	7.0%	4.1%	4.6%	4.5%

Source: ONS Business Register and Employment Survey (2018) / Lichfields Analysis

Earnings

- 3.22 In 2018, the average (median) earnings by residence in Conwy for full-time workers was £511.60 per week¹². This figure is above the North Wales average (£501.23 per week) but below the Welsh (£518.60) and national averages (£571.10 per week). However, of all the North Wales authorities, only Wrexham has higher residential earnings than Conwy.
- 3.23 Workplace earnings in Conwy are lower than resident-based earnings. Gross workplace weekly pay amounts to £449.20¹³ in the County, which is significantly below the North Wales (£487.70), Welsh (£509.00) and Great Britain (£570.90) averages. Only Anglesey (£446.90) has a lower workplace earnings figure than Conwy. This indicates that many residents travel out of the County to seek higher paid employment elsewhere, such as Flintshire and Denbighshire.

¹² ONS annual survey of hours and earnings (2018)

¹³ Ibid

Table 3.10 Median Gross Weekly Earnings (2018)

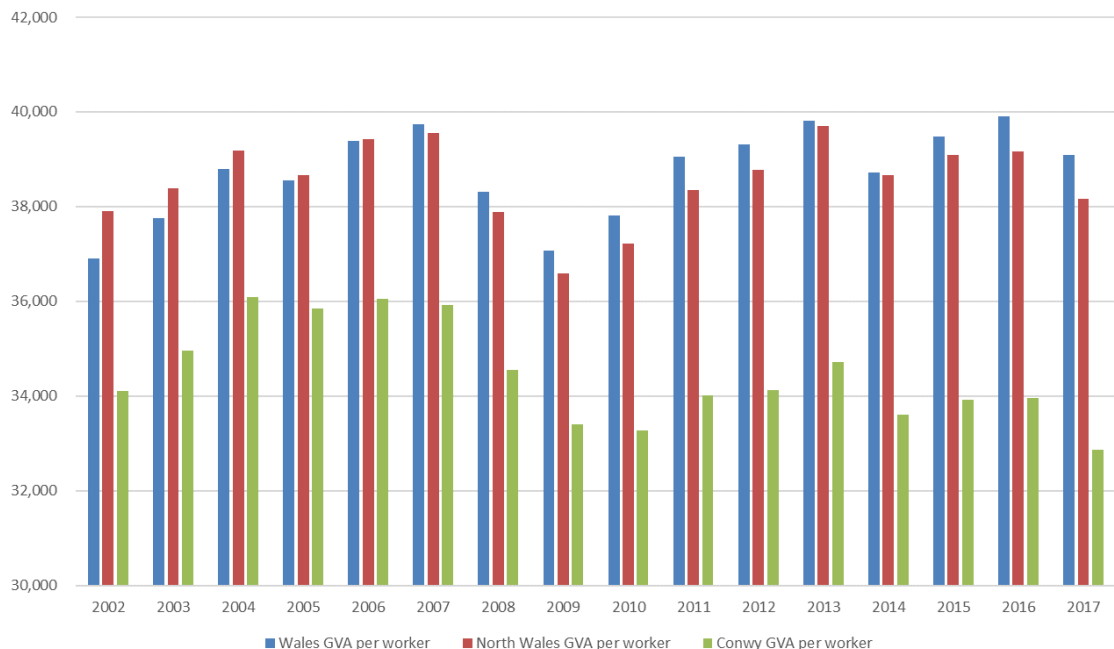
	Resident Earnings	Workplace Earnings
Anglesey	£492.90	£446.90
Conwy	£511.60	£449.20
Denbighshire	£489.60	£504.10
Flintshire	£503.30	£553.00
Gwynedd	£478.40	£469.60
Wrexham	£531.60	£503.60
North Wales	£501.23	£487.70
Wales	£518.60	£509.00
Great Britain	£571.10	£570.90

Source: ONS annual survey of hours and earning (2018)

GVA (Productivity)

- 3.24 Productivity (measured by Gross Value Added [GVA] per worker) within the labour force in Conwy currently stands at £30,960 per worker, which is significantly lower than the North Wales (£38,160) and Welsh (£39,090) equivalents.
- 3.25 As shown in Figure 3.1, GVA per worker remained below the regional and national averages over the period 2002-2017. This could reflect the concentration of lower value employment within Conwy and indicates scope to enhance the authority's productivity levels and output in future.
- 3.26 Since 2002, GVA per worker in Conwy has fallen, from £34,103 to £32,873 in 2017 (-3.6%). This rate is lower than the regional growth rate of 0.7% and significantly below the national average rate of growth (5.9%) over the same period.

Figure 3.1 Average GVA per Worker 2002-2017



Source: Experian / Lichfields Analysis

Welsh Language

3.27 The Welsh Government has ambitions for there to be 1 million Welsh speakers by 2050. This ambition is highlighted by the Welsh Government's 'Cymraeg 2050 Strategy' which sets out their long-term approach to achieving this vision. The Welsh Government's strategy identifies three strategic themes to achieve this vision:

- Increasing the number of Welsh speakers;
- Increasing the use of Welsh; and,
- Creating favourable conditions – through infrastructure and context.

3.28 According to the latest National Survey for Wales (June 2018), 19% of adults aged 16 and over can speak Welsh. 11% said they can speak Welsh fluently, whilst 12% stated that they can speak more than a few words of Welsh and speak it every day¹⁴.

3.29 The Welsh Language Use Survey (2014-15) focused on:

- Welsh language ability;
- Use of Welsh language at work;
- Education; and,
- Use of the language.

3.30 Table 3.11 shows the proportion of North Wales' population that can speak Welsh proficiently; Conwy Council is below the North Wales average rate. The Isle of Anglesey and Gwynedd have the highest proportion of Welsh speakers in the region.

Table 3.11 Ability to speak Welsh

	Can speak Welsh (%)	Can't speak Welsh (%)	Can't speak Welsh, but have some Welsh speaking ability (%)
Anglesey	62%	36%	2%
Gwynedd	73%	23%	4%
Conwy	29%	62%	9%
Denbighshire	33%	65%	2%
Flintshire	12%	84%	4%
Wrexham	16%	80%	3%
Powys	19%	73%	8%
North Wales	35%	61%	5%

Source: National Survey of Wales (2014-15)

3.31 In 2017, The North Wales Economic Ambition Board [NWEAB] published its 'Regional and Skills Implementation Plan 2017' which highlighted the importance of the Welsh language within certain sectors.

3.32 The Plan stated there needs to be a strong emphasis to promote the Welsh language within the health and social care sector across the spectrum of services it provides. This is largely due to factors such as inward migration of staff and transient employment within the health and social sector.

¹⁴ Welsh Government (2018) National Survey of Wales 2017-18

3.33 The Plan goes on to state that:

“Of concern is that sector staffing Welsh language skills in both Conwy and Denbighshire are significantly lower at 16% and 11% respectively, despite the ability for the general population in terms of Welsh language skills being at 35% in both counties.”¹⁵

3.34 For instance, the North Wales Regional Social Care and Community Health Workforce Strategy focuses on workforce requirements within the social care and community health sector¹⁶. The Strategy states that service providers should commit to recruiting Welsh speakers to meet the needs of clients accessing their services. This would particularly help to meet the needs of patients and clients whose first language is Welsh. This suggests that to deliver client focused services, delivery of care and treatment via Welsh language skills is essential.

Student Retention Rates

Higher Education

3.35 The Higher Education Statistics Agency [HESA] is the official agency for collating and analysing Higher Education data in the UK. HESA publishes a number of datasets focused on student retention rates for Higher Education institutions across the UK. Table 3.12 shows the number of full-time students that attended Welsh universities in the 2016/17 academic year. The following reasons are primarily for FT students that left HE at the Welsh universities which include:

- “The percentage who continue at the same HE provider, transfer to another HE provider and are no longer in HE the year after entry;
- For first degree entrants the percentages who continue, transfer and are no longer in HE by low participation neighbourhood marker (for young entrants) and previous HE marker (for mature entrants); and,
- The percentage who continue at the same HE provider (either on the same course or elsewhere in the HE provider), transfer to another HE provider, or are absent from Higher Education completely two years after entry with a split for young and mature entrants.”¹⁷

Table 3.12 Full-time undergraduates entrants in the academic year (2016/17)

University	Total full-time entrants	Number no longer in HE	Percentage no longer in HE (%)
Aberystwyth University	1,740	95	5.4%
Bangor University	2,275	115	5.0%
Cardiff University	4,885	205	4.2%
Cardiff Metropolitan University	2,400	245	10.2%
Glyndŵr University	980	150	15.1%
The Open University in Wales	0	0	0.0%
Swansea University	3,735	135	3.7%
University of Wales Trinity Saint David	1,485	155	10.5%
University of South Wales	3,285	360	11.0%
University of Wales (central functions)	0	0	0.0%
Wales TOTAL	20,795	1,460	7.0%

Source: HESA - Table T3 & T3e (2018)

¹⁵ North Wales Economic Ambition Board (2017): Regional Skills and Employment Plan 2017

¹⁶ North Wales Workforce Board (2017): North Wales Regional Social Care and Community Health Workforce Strategy

¹⁷ HESA (2018): Table T3 & T3e – Non-continuation two years following year of entry (2016/17)

- 3.36 It is evident from Table 3.12 of the Welsh universities Wrexham Glyndŵr has the highest proportion of full-time (15.1%) students that do not continue their first degrees after a year after entry in the 2016/17 academic year.
- 3.37 In contrast, the other university based in North Wales, Bangor University, has a lower proportion of full-time entrants that dropout compared to the overall Welsh figure.

Further Education

- 3.38 Stats Wales provides Further Education data based on the number of learners enrolled at FE institutions in Wales leaving their programme of learning during the academic year. This dataset consists of a workforce-based learning provision at Further Education institutions on a consortium member basis and local authority community learning where there is a formal enrolment with an FE institution.

Table 3.13 Full time learners leaving further education institutions (2015/16)

Destination after leaving programme	Conwy		North Wales		Wales	
	16-24	All ages	16-24	All ages	16-24	All ages
New programme of learning (not Higher Education)	40%	37%	45%	43%	55%	45%
Higher Education	13%	13%	14%	14%	26%	13%
Education or training - type not known	0%	0%	0%	0%	7%	0%
Entering new employment / changing employment	0%	0%	0%	0%	0%	0%
Continuing current employment	0%	0%	0%	0%	0%	0%
Employment / employed	19%	19%	15%	15%	0%	11%
Seeking work / unemployed	5%	5%	6%	6%	6%	7%
Self-employment	0%	0%	0%	0%	4%	0%
Voluntary work	0%	1%	0%	0%	0%	0%
Continuing existing programme of learning	0%	0%	0%	0%	0%	0%
Other	4%	4%	3%	4%	0%	4%
Not known	19%	21%	16%	17%	2%	19%
All destinations	100%					

Source: Stats Wales / Lichfields Analysis

- 3.39 As demonstrated in Table 3.13, the most common next step for FE students in Conwy is to leave one course to pursue another, but without advancing to Higher Education. That group is larger in the rest of North Wales, and in Wales as a whole, whereas in Conwy it is more common for young people to leave college to start work (19% for Conwy, 15% North Wales, and 11% all Wales). The proportion of students who leave FE to start a HE course is the same in Conwy as across Wales more generally (13%).

Employer Investment in Skills

- 3.40 In 2016, the UK Commission's Employer Skills Survey [ESS] represents the definitive source of intelligence on the skills challenges employers across the UK are facing and their response in terms of investment in skills and training. The survey draws upon over 6,000 interviews conducted with employers in Wales.
- 3.41 The report highlighted that total employer expenditure on training increased by 8% between 2013 and 2015, from £1.9 billion to £2.1 billion¹⁸. This is despite average spend per employee trained remaining the same as the 2013 figure – however the Welsh average spend was higher than the UK. Respondents of the ESS stated that the most common form of training for their

¹⁸ Welsh Government (2015) Employer Skills Survey 2015: Wales Report

employees was related to online or e-learning (or other self-training) which was 43% and 37% respectively.

3.42 Across Wales, the average employers' total investment in training was equivalent to around £2,750 per person and £1,750 per employee¹⁹ – which was in line with the average spends in 2013, but an increase in comparison to UK.

Essential Skills

3.43 According to the ESS, the vast majority of Welsh Employers (86%) that were interviewed stated that their staff were proficient at their jobs (which is also known as the skills gap density – defined as the proportion of staff not fully proficient in their job). Across North Wales, the proportion of staff not proficient in their job decreased from 7.6% to 4.4% - which is now at a similar rate to the Welsh level (4.5%).

3.44 Survey findings identified that larger companies were more likely to experience skills gaps amongst their employees compared to smaller companies. Across Wales, 6% of establishments with 2-4 employees experienced skills gaps, rising to 51% of those with 100 or more employees²⁰. Across Wales, employers identified a variety of factors that led to skills gaps in their workforce which are set out in Table 3.14.

Table 3.14 Main causes of skills gaps (prompted)

Main causes for skill gaps amongst Welsh Employers	2011	2013	2015
Staff are new to the role	58%	63%	67%
Their training is currently only partially completed	62%	47%	63%
Staff lack motivation	35%	52%	46%
They have been on training but their performance has not improved sufficiently	34%	47%	37%
Unable to recruit staff with the required skills	26%	35%	31%
The introduction of new working practices	30%	29%	30%
Staff have not received the appropriate training	33%	27%	27%
The introduction of new technology	26%	20%	26%
Problems retaining staff	10%	24%	17%
The development of new products and services	22%	21%	15%

Source: Employer Skills Survey 2015: Welsh Report

3.45 Reasons such as staff being new to the role and incomplete training were the most common cause of skills gaps (67% and 63% respectively) amongst Welsh employers in 2015.

3.46 According to the ESS, respondents generally defined their employees' lack of skills into two categories –

- Technical and practical skills - which define the content of the role; and,
- People and personal skills – which focus on the softer skills.

3.47 Amongst Welsh employers, Figure 3.2 shows that the most common people and personal skills gap relate to time management and prioritisation of tasks (67%). This may be at least partly attributable to staff members struggling to cope with the demanding nature of their roles, whilst another problem area for existing staff is team working (57%)²¹.

3.48 In terms of technical and practical skill gaps, specialist / knowledge-based skills required for the particular job role of the employee were identified by around 56% of respondents. This was followed by operational knowledge (44%) and lack of knowledge in terms of how the

¹⁹ Ibid

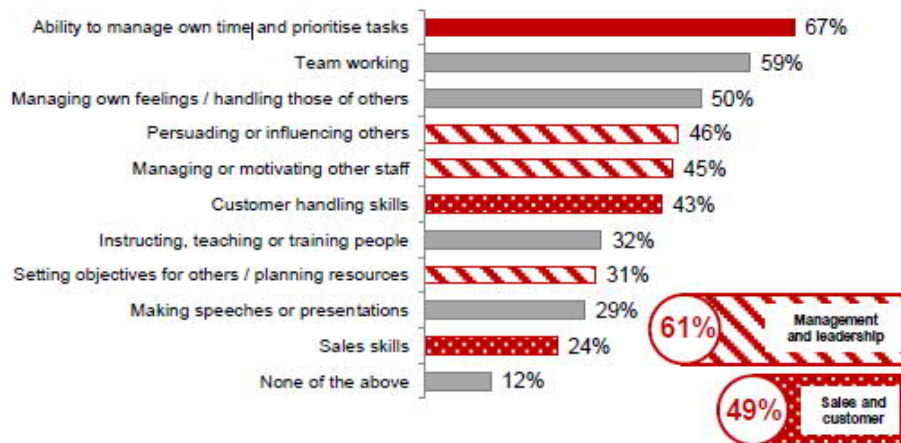
²⁰ Ibid

²¹ Welsh Government (2015) Employer Skills Survey 2015: Wales Report

organisation worked (40%). Other skill gaps mentioned by respondents include that there were also deficiencies in complex analytical skills: 37% of skills gaps were attributed to a lack of proficiency in solving complex problems, and 28% were attributed to a lack of complex numerical or statistical skills.

Figure 3.2 Skills lacking among staff with skills gaps

People and personal skills that need improving:



Technical and practical skills that need improving:



Source: Employer Skills Survey 2015

4.0 Key Transformational Projects

- 4.1 This section focusses on the seven key transformational projects across North Wales and the future demand for and supply of skills across Conwy County and North Wales required to make these projects successful.
- 4.2 CCBC has asked Lichfields to take into account a number of high profile and major private sector led developments across North Wales which will influence future economic growth and likely have spin-off benefits for Conwy.
- 4.3 This is in anticipation of significant demand for workforce skills from key growth sectors and development projects in North Wales, as well as how this feeds into CCBC's ambitions to accommodate a dedicated Higher Education resource in the County.

Development Projects

Colwyn Bay Tidal Lagoon

- 4.4 The Colwyn Bay Tidal Lagoon is a long-term opportunity which would generate in the region of 3,000 MW of electricity as well as playing a role in flood defence along the coast. The development would make a significant investment in the North Wales economy and particularly Conwy, where the scheme would be located.
- 4.5 Colwyn Bay Tidal Lagoon has the potential to act as a flood defence, protecting some of the communities that are often worst hit by flooding along the North Wales coast.
- 4.6 The proposal aims for 50% of the project costs to be spent in Wales which provides a huge opportunity for local companies, whilst there are additional plans to use part of the Colwyn Bay Tidal Lagoon as a recreational facility.
- 4.7 An independent report for Tidal Lagoon Power in 2014 estimated the economic impacts from future tidal developments; concluding that the medium growth scenario of five lagoons across the UK indicates that Colwyn Bay Tidal Lagoon could create up to 414 construction jobs and approximately 86 jobs when operational²².
- 4.8 However, there is growing uncertainty around the instability of tidal lagoons in the UK, with the recent announcement concerning Swansea Tidal Lagoon potentially having wider ramifications for the deliverability of the Colwyn Bay proposal which could have implications on the viability of Colwyn Bay Tidal Lagoon proposals. In June 2018, the UK Government decided not to support the Swansea Tidal Lagoon project raising questions about value for money. Swansea Council later revealed its' plans to pursue the project itself - announcing it had established a task force to look at alternative ways of delivering the project²³.

Consultation

- 4.9 A telephone discussion was held with a senior representative at Tidal Lagoon. He leads the scoping work in Colwyn Bay and also leads the independent Wales Tidal Industry Advisory Group. He highlighted the uncertainty surrounding the project due to the UK Government's refusal to support the Swansea Bay Tidal Lagoon pathfinder project. However, he was able to provide information on the skills requirements needed for the tidal lagoon more generally which is relevant for Colwyn Bay.

²² CEBR (July 2014) The Economic Case for a Tidal Lagoon Industry in the UK

²³ <https://www.newcivilengineer.com/latest/swansea-bay-tidal-lagoon-looks-to-private-sector-to-revive-project/10036502.article>

- 4.10 The Colwyn Bay Tidal Lagoon is anticipated to cost around £7 billion²⁴ with an expectation that around 50% of the capital expenditure would be retained within Wales. In terms of the supply chain network, there are an estimated 2,000 companies that would benefit from the supply chain for the five tidal lagoon programmes (including Colwyn Bay) – 10% of these companies would likely be from North Wales. These companies are likely to be in a number of CCBC's key growth sectors including:
- Manufacturing;
 - Civil engineering;
 - Mechanical engineering; and,
 - Construction.
- 4.11 Specifically for Colwyn Bay, it was suggested that 14,000 construction workers are required to build Colwyn Bay Tidal Lagoon over the construction period. The Construction Industry Training Board [CITB] has been responsible for producing construction job forecasts for the Tidal Lagoon and expects that one direct construction job will lead to four / five indirect jobs across the supply chain.
- 4.12 However, he expressed concerns regarding where the construction labour is likely to come from, as he considered that currently there is a skill shortage in construction labour in North Wales and across the UK. Construction labour shortages could potentially be exacerbated by other major infrastructure projects occurring in North Wales and other parts of the UK at the same time such as HS2 and the potential Heathrow Logistical Hubs within Wales.
- 4.13 The senior representative at Tidal Lagoon stated that Tidal Lagoon has been building partnerships with Coleg Menai specifically in boosting construction skills within North Wales. In addition, he has been working with Bangor University on a number of courses that relate to research & development, ecology engineering and marine activities. He hopes this partnership will assist Tidal Lagoon in employing people with the right skill base once Colwyn Bay Tidal Lagoon is operational. However, at the time of the discussions, construction and operational dates could not be confirmed.
- 4.14 Once the Tidal Lagoons are operational, concerns were raised that there will be a need for people that work in mechanical assembler roles which it is anticipated will come from outside North Wales. Furthermore, the representative stated that there would be a problem in recruiting people working within ecology and engineering specialist roles and this would require a UK wide recruitment campaign for these vacancies to be filled.

Deeside Advanced Manufacturing Skills & Technology Institute

- 4.15 The proposed Deeside Advanced Manufacturing Skills & Technology Institute will play a supporting role for the sector across North Wales. The proposed facility is to be located in the Deeside Enterprise Zone. It is currently under construction and due to open by the end of 2019²⁵. The proposed development would support businesses of all sizes and focus on workforce skills development and the commercialisation of new technologies.
- 4.16 The institute would focus on the manufacturing process and technology enhancements that would benefit a number of sectors including manufacturing, energy, and food. Coleg Cambria is a leading proponent of the institute and would play a major role in skills development, both for businesses and young people entering the workforce.

²⁴ <https://www.walesonline.co.uk/business/business-news/massive-7-billion-tidal-lagoon-14836557>

²⁵ <https://www.gov.uk/government/news/welsh-government-working-with-deca-on-plans-for-second-welsh-advanced-manufacturing-and-research-institute>

- 4.17 The University of Sheffield Advanced Manufacturing Research Centre [AMRC] has worked with Deeside Enterprise Zone Advisory Board, Swansea University, and Coleg Cambria to develop the new institute in conjunction with Airbus and other companies. Once the institute is developed it is intended to help improve the performance of manufacturing businesses currently located in Conwy County.
- 4.18 The Welsh Government has taken the lead in the project by investing £20m for the new institute with a strong focus on advanced manufacturing sectors including aerospace, automotive, nuclear and food²⁶.
- 4.19 The institute will aim to deliver a totally new level of support to key manufacturing companies as well as multi-sector supply chain companies and the broader SMEs economy, and will be focused on increasing productivity, commercialisation, innovation and skills development. CCBC will need to ensure that they work closely with the institute to ensure that local people and businesses take advantage of future opportunities.

Menai Science Park [M-Sparc]

- 4.20 Bangor University has developed a new Science Park on the Isle of Anglesey which will provide new laboratory and teaching spaces, as well as high-tech business spaces for new and established businesses. The development will help to stimulate the knowledge-based economy across North Wales by undertaking R&D and supporting business growth and innovation.
- 4.21 M-SParc's vision is to drive knowledge-based science linked to research expertise. This will be achieved by stimulating an entrepreneurial culture linking innovation in key sectors such as low carbon energy, the environment and ICT. M-Sparc wishes to develop an area of innovation in North West Wales, with the Science Park being a catalyst for innovative ideas in the region. The Park also sees itself as making a contribution to growing the region's economy and the provision of a skilled workforce²⁷.
- 4.22 M-SParc is building strong ties with Bangor University, in particular the Colleges of Physical and Applied Sciences, Natural Science, and Health and Behavioural Science. Other universities and research institutes in the UK, Europe and worldwide working on relevant and linked projects are also intending to work closely with M-Sparc. Linking academic expertise with business opportunities will be a key part of M-SParc's offer.

Consultation

- 4.23 A telephone discussion was held with a Director at M-SParc who leads on the strategic development of the Science Park and was the Project Manager for the construction phase. During the construction phase, he highlighted that there was an acute shortage in employing construction labour across all levels including project managers, quantity surveyors, bricklayers, site managers and plumbers. This led to an intensive recruitment campaign to find the right construction workforce.
- 4.24 The Director (at M-SParc) estimated that around 75% of workers employed during the construction phase were from the North Wales region. As major infrastructure projects typically rely on a nationally mobile workforce, that is a high percentage. In contrast, he estimated that only 25% of current employees at M-SParc are from the region demonstrating that M-SParc is struggling in terms of employing local people to work in higher value-added jobs.
- 4.25 He mentioned that many of M-SParc's current tenants are concerned about the lack of programmers, software developers and other digital sector roles within the wider North Wales

²⁶ <http://www.deeside.com/Construction-begins-on-advanced-manufacturing-research-institute-in-broughton/>

²⁷ <http://www.ukspa.org.uk/members/menaisp>

region. He mentioned that the real key skills shortage for a number of tenants relates to the 'Creative and Digital' growth sector. North Wales struggles to compete with other cities such as London, Manchester, Cardiff, Bristol and Birmingham for both companies and workers on factors such as salaries and lifestyle.

- 4.26 The labour market for higher level skills is a national one. Like many rural areas comparatively remote from the main conurbations, Conwy faces significant challenges in competing effectively in a national market, both in persuading local people to stay (once trained), and in convincing others to relocate to the area. Quality of life, and the chance of a better work / life balance, are likely to feature heavily for those who choose to stay in Conwy, or move to it.
- 4.27 M-SParc is working in partnership with Horizon on the Energy Island programme (a programme to provide specialist skills training for the planned low-carbon energy projects). It was mentioned that this partnership would involve working on the first nuclear research institute in Wales which has opened at Bangor University. The Nuclear Futures Institute is being funded by the Welsh Government's Sêr Cymru programme, which is helping to attract world leading researchers to Wales, with funding also coming from the European Regional Development Fund and Bangor University.

Orthios Eco Park and Energy Centre

- 4.28 The Orthios Eco Park and Energy Centre in Anglesey will utilise waste heat generated by a new biomass plant for food production. The development was expected to commence construction in 2018; however, plans to start have been delayed with the construction date still unknown at the time of writing. It is expected that Eco Park will create 1,000 construction jobs and 700 jobs once it is operational²⁸.
- 4.29 The site at Holyhead is situated in close proximity to strategic road, rail and sea links as it is close by the Port of Holyhead. There are plans for Orthios Eco Park to provide a rail freight terminal using the site's existing sidings and rail line access to reduce road traffic on and off the island of Anglesey, providing additional jobs and revenue. Orthios Eco Park is one of a number of transformational major infrastructure projects across North Wales, with significant direct employment and supply chain opportunities for people and businesses both locally and regionally. It is anticipated that this will be a key driver for jobs, economic growth and prosperity for North Wales.

Consultation

- 4.30 A telephone discussion was held with a Human Resources Manager at Orthios Eco Park. She confirmed that the demolition and clearing of a large proportion of the Holyhead site and older industrial complex is still ongoing and has taken longer than expected. The proposal includes using the existing c.600,000 ft² former aluminium pot line buildings to process plastic feedstock into high value products.
- 4.31 At the time of writing, Orthios Eco Park has 18 staff members, with 13 of those working in the care and maintenance [C&M] department. The roles of the C&M team include labourers, multi-skilled tradesman and mechanical and electrical engineers. The majority of the current staff live within the North Wales region.
- 4.32 Once construction begins, there will be a need for a wide range of construction jobs which may be problematic as there is likely to be significant competition for these workers amongst other key development projects taking place across North Wales more generally.

²⁸ <http://www.anglesey.gov.uk/Journals/p/q/d/Orthios-easy-read.pdf>

4.33 There could be difficulties in employing people at the operational stage of the Eco Park due to the specialist roles required, which are likely to include:

- Health and Safety roles;
- Quality Control roles;
- Senior Managerial roles;
- Care and Maintenance; and,
- Back Office staff.

Parc Adfer

4.34 Parc Adfer is an energy-from-waste recovery facility in Deeside. It is expected to generate up to 350 jobs during peak construction as well as an estimated £14m of supply chain opportunities²⁹.

4.35 In 2014, Wheelabrator Technologies was selected as preferred bidder to build and operate the Wheelabrator Parc Adfer facility over the next 25 years as a public-private partnership [PPP], with support from the Welsh Government to serve the five local authorities that make up the North Wales Residual Waste Treatment Project [NWRWTP]. These authorities comprise Conwy County Borough Council, Denbighshire County Council, Flintshire County Council, Gwynedd Council and the Isle of Anglesey County Council.

4.36 Parc Adfer is expected to be operational in early 2020 and will be able to process up to 200,000 tonnes per year of post-recycled waste, generating enough renewable energy to meet the needs of over 300,000 homes³⁰. At the time of writing, 80% of the civil works have been completed (building structure, building cladding, building services, and underground services) and around 60% of the process.

4.37 It is estimated that Parc Adfer will create 35 new full-time operational jobs during its 25 years of operation³¹.

Consultation

4.38 Lichfields held discussions with a Project Director at Wheelabrator Parc Adfer and Chairman of the Parc Adfer Community Liaison Group. Part of his remit involves community liaisons / projects. During the discussion, it was suggested that currently 270/280 construction workers were on-site (350 construction workers at its peak stage) and an estimated 40% of these construction workers were employed locally (i.e. within a 30-mile radius). This is largely due to the specialist nature of the construction programme which requires a significant amount of specialist labour from outside North Wales.

4.39 In contrast, he noted that the majority (75%) of the 35 operational jobs are likely to be occupied by local residents. Around 26 out of these jobs will be consisting of technical roles including: team leaders, operating technicians and mechanical engineers, with the remaining 9 operational jobs being lower skilled occupations.

4.40 It was suggested that recruiting for Parc Adfer's operational jobs will not be an issue, as the majority of the specialist roles are likely to be filled by existing local workers from decommissioned projects across North Wales.

²⁹ <https://www.wtiparcadfer.co.uk/about-us/news-and-events/parc-adfer-unveils-multi-million-pound-supply-opportunities-for-north-wales-businesses/>

³⁰ <https://www.wtiparcadfer.co.uk/>

³¹ <https://parcadferConstruction.co.uk/faqs-employment-supplier-and-training-opportunities/>

4.41 He confirmed that Wheelabrator is actively involved in apprenticeship schemes in other locations. However, this will happen after this site becomes operational and once the core operations team are familiarised with the plant design and operation³².

4.42 Wheelabrator is considering working closely with schools and the Engineering Education Schools Wales [EESW] to promote STEM subjects amongst young people. Furthermore, Wheelabrator is considering how to incorporate local school curriculums into Parc Adfer's Visitor Centre educational offer.

Wrexham Energy Centre

4.43 The Wrexham Energy Centre is a proposed combined cycle gas turbine [CCGT] power station being delivered on Wrexham Industrial Estate. The Energy Centre is being delivered by Wrexham Power Limited [WPL] which is a joint venture between Glenfinnan and St. Modwen.

4.44 In 2017, WPL was granted a Development Consent Order [DCO] for the Wrexham Energy Centre. The proposed development represents an investment of £300m into the North Wales' economy and will:

- Provide 30 highly skilled permanent local jobs;
- Create up to 515 construction jobs over three years;
- Provide an opportunity to increase the resilience of the power supply to the Wrexham Industrial Estate; and,
- Reduce the area's reliance on imported energy as well as improving its energy security.³³

4.45 WPL is intended to provide a solution to the impending closures of conventional coal and oil-fired power stations for various reasons (age, obsolescence, economic factors etc.) across the UK.

Summary

4.46 Through Lichfields' discussions with key developers across North Wales, it was evident that there were issues in recruiting for specific roles for the construction and operational phases of these key development projects. Each development project stated that there would be issues recruiting for specialist roles and this could lead to intensive recruitment campaigns to fill current and future vacancies from outside of North Wales. However, many of the key developers have recognised these people and skill shortages and have already built key partnerships with the educational institutions across North Wales and across the UK.

4.47 For the construction phases of these key developments, it is evident that a number of the skilled construction trades are easier to recruit within North Wales in comparison to the white-collar construction roles including construction site managers, project manager, quantity and surveyors.

4.48 As the majority of the key developments are related to the Advanced Manufacturing, Energy & Environment and Creative & Digital sectors there will be a skills demand for STEM related roles. All key developers suggested that there would be a need for STEM related roles such as engineers (mechanical / electrical and nuclear), surveyors and project managers. Problems facing these sectors are related to the increasing number of people with these skills leaving the sector due to retirement. To meet the people and skills shortages across North Wales, many of the key developers stated that CCBC should promote Conwy County as a location that could

³² http://wtiparcadfer.co.uk/site/assets/files/1116/aal-05-60-1019-01_clg_minutes_25_july_2018.pdf

³³ <http://www.wrexham-power.com/index.html>

provide lifestyle and work / life balance. It is important, the requirement for workforce from outside the County could lead to the increased pressure on housing within the County and across North Wales.

5.0 Skills Needs Survey

5.1 CCBC and Lichfields conducted an online survey in 2018 to gain a clear understanding of the skills needs and requirements of local businesses within Conwy. The survey had a particular focus on questions concerning the type and size of skill requirements needed and their businesses' growth ambitions for Conwy.

Profile of Businesses

5.2 The Skills Needs Survey received responses from 22 businesses of various sizes and individual sectors. All of the respondents were small companies employing fewer than 50 people; with the majority employing fewer than 10 members of staff.

5.3 Table 5.1 compares the size of businesses, based on the number of Full Time Equivalent employees [FTEs] working for the survey responses and wider business population. The majority of respondents (77%) were micro businesses employing fewer than 10 FTEs. More than twice as many companies responded employ between 10 to 49 FTEs compared to the County-wide level.

Table 5.1 Comparison of Business Size

Size of Business	Business Survey	Conwy Business Population
0 to 9 FTEs	77.3%	89.2%
10 to 49 FTEs	22.7%	9.2%
50 to 249 FTEs	0.0%	1.3%
250+ FTEs	0.0%	0.3%

Source: Conwy County Borough Council Survey (Q1-Q2 2018), Lichfields' analysis, and ONS (March 2017) Inter-Departmental Business Register

5.4 Only four businesses reported that they employed apprentices; of these businesses, apprentices comprised between 2% and 17% of the workforce. Six businesses reported that some of their staff worked from home. All of these were micro-sized businesses with fewer than 10 employees.

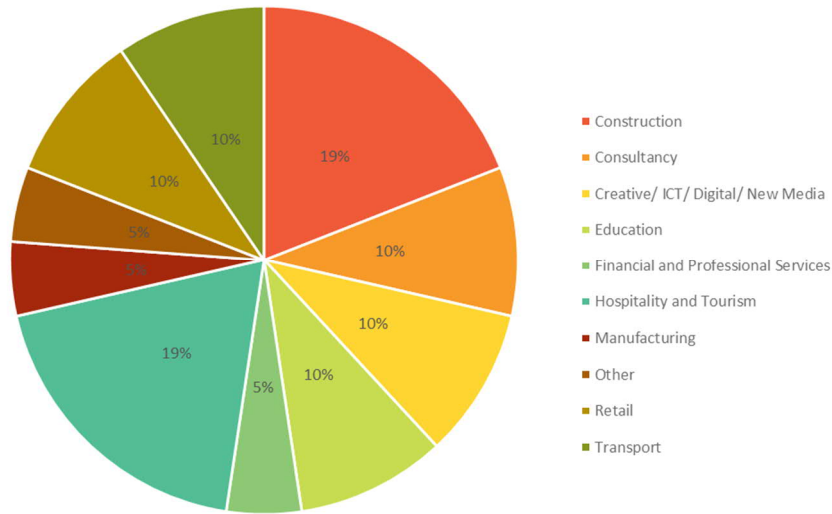
Businesses Sectors

5.5 Approximately 60% of businesses stated that they served international markets whilst 80% served the UK market. This demonstrates the international nature of Conwy County's tourism sector.

5.6 Business respondents covered a broad range of sectors, although sectors such as manufacturing and logistics / distribution were strongly represented. This is perhaps slightly surprising given that the analysis in Figure 5.1 indicates that these sectors are significantly under-represented in Conwy County. There were also a number of responses from potential growth sectors, such as Tourism, Hospitality and Construction.

5.7 Figure 5.1 illustrates the sector distribution of respondents' businesses.

Figure 5.1 Distribution of Business Sectors



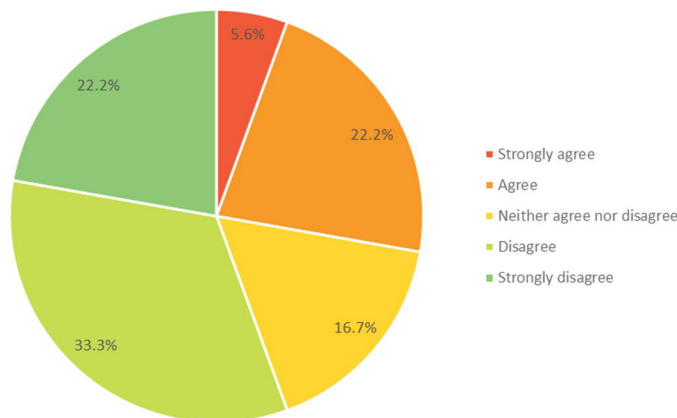
Source: Conwy County Borough Council Survey (Q1-Q2 2018), Lichfields' analysis

- 5.8 The survey respondents included both new and long-standing businesses to Conwy. 62% of businesses had been at their premises for 10 years or more compared to 19% of respondents that had reported they had been at their current premises for 5 years or less.
- 5.9 Of the businesses for whom their current premises were not their first, the vast majority (83%) had moved from elsewhere in Conwy. The other businesses had moved from other neighbouring counties, notably as Denbighshire and Flintshire.

Current Skills

- 5.10 As part of the Survey, businesses were asked to describe the skill level of their current workforce. As highlighted in Figure 5.2, over half of respondents (55.6%) stated that their current workforce does not have the required skills to meet the needs of their business. In contrast, just 27.8% of respondents felt that their current workforces' skill level meets their business requirements.

Figure 5.2 Current workforce skills levels sufficient to meet business need



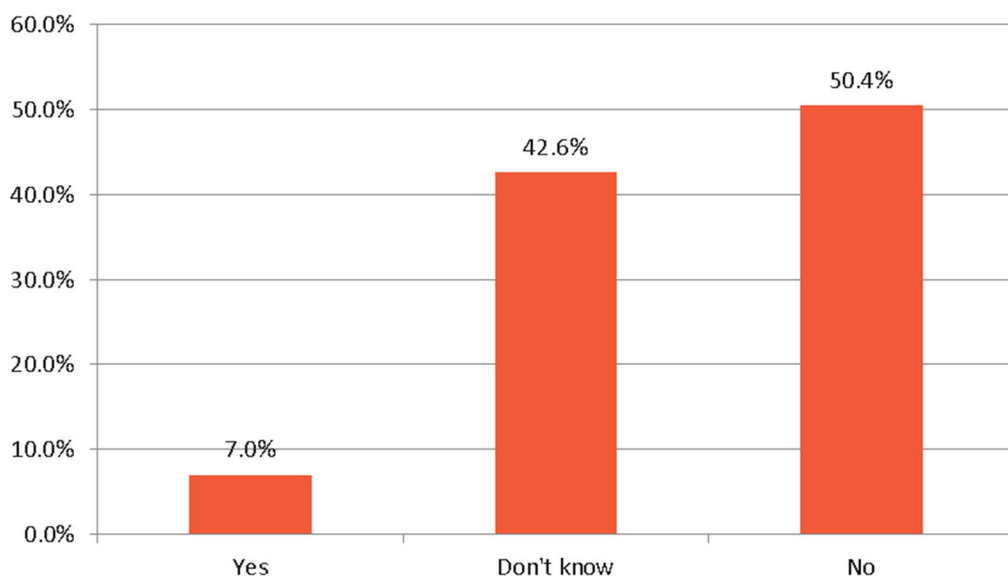
Source: Conwy County Borough Skills Needs Survey (Q1-Q2 2018), Lichfields Analysis

- 5.11 37.5% of respondents stated that the labour supply within Conwy County and the wider North Wales region do not have the right qualifications / skills to meet their businesses' operational needs – in comparison, just 18.8% of respondents felt the County's labour supply did have the required skills.
- 5.12 The majority of businesses (52.9%) stated that the lack of suitable skills amongst the current workforce results in businesses having to do too much on-the-job training for new staff. This could result in short term falls in productivity for local businesses.
- 5.13 It is evident from the survey respondents that Conwy's current workforce tends to have general workforce skills rather than more specific skill sets. This aligns with the opinions of some key local stakeholders consulted, who generally acknowledged there is currently a skills shortage for STEM related skills across Conwy and North Wales more generally.
- 5.14 The Skills Need Survey highlighted a number of factors that affected businesses in regard to the current workforce skills, which included:
 - Apprentices are not given enough time to train practically;
 - There are problems recruiting the right people due to relatively lower wages in certain industries (such as Tourism / Leisure).

Education and Training

- 5.15 In terms of training opportunities, the majority of respondents (90%) stated that they provide in-house training for their employees, hence most companies are providing opportunities for their workforce to upskill.
- 5.16 The survey outcomes showed that 68% of respondents are unlikely to outsource any workforce training or education from a provider such as a college, university or private company. This demonstrates that many either are unwilling to pay for external companies to provide training for their staff or they prefer for their employees to gain on-the-job training.

Figure 5.3 Do you think there is a need for a new Higher Education facility in Conwy?



Source: Conwy County Borough Skills Needs Survey (Q1-Q2 2018), Lichfields Analysis

- 5.17 Figure 5.3 summaries respondents' views on the need for a new Higher Education facility in Conwy County. Half of respondents considered that there was not a need to establish a new

Higher Education facility, with several mentioning that existing education facilities appear adequate – in particular the Grŵp Llandrillo Menai colleges. Only 7% of respondents support CCBC’s proposal for a Higher Education facility.

Skill Priorities

- 5.18 As shown in Table 5.2, respondents were asked what training and skills should be prioritised by training providers in North Wales over the next five years. The most common training and skills that respondents felt should be addressed were oral communication skills (50%) followed by planning and organisation (45%) and technical, practical or job specific skills (45%).

Table 5.2 What training and skills should be prioritised by providers in North Wales over the next 5 years?

Skills / Training	% of respondents that feel these skills should be prioritised
Oral communication skills	50%
Planning and organisation skills	45%
Technical, practical or job specific skills	45%
Written communication skills	41%
Customer handling skills	41%
Problem solving skills	41%
Basic computer literacy / using IT	36%
Advanced IT or software skills	36%
Team working skills	36%
Literacy skills	36%
Strategic management skills	32%
Numeracy skills	32%
Oral Welsh language skills	18%
Foreign language skills	18%
Written Welsh language skills	9%
Other	9%

Source: Conwy County Borough Skills Needs Survey (Q1-Q2 2018), Lichfields Analysis

- 5.19 Interestingly, a smaller proportion of the businesses expressed a need for training programmes for oral / written Welsh and foreign language skills. This is despite 60% of businesses stating that they served international markets.

Future Priorities

- 5.20 The Skills Need Survey asked several questions in relation to skills needs and requirements over the next five years. Only 11% of respondents were confident that there will be a sufficient workforce supply across North Wales to meet their businesses’ demands over the next five years. This is in contrast to 61% of respondents that disagree there will be sufficient supply in the future. This demonstrates that local businesses have serious concerns regarding whether they will be able to recruit the right staff.
- 5.21 Local businesses expressed concerns that the situation is unlikely to improve in the future. Only 6% of respondents felt confident that the future workforce skills supply will fully meet the demands of their business. In contrast, 67% of respondents considered that it is likely that they will struggle to recruit people from the future workforce that would meet their businesses’ future requirements.
- 5.22 CCBC has stressed the importance of how a number of key developments across North Wales would impact Conwy’s economy. As part of the Skills Needs Survey, local businesses were asked

whether major infrastructure projects may make it difficult for local businesses to recruit staff. This is largely due to the expectation that these major infrastructure projects will lead to a greater demand for workforce skills than can be supplied. Half of respondents were unable to decide whether this will happen. In contrast, a third of respondents (33%) agreed that there would be a shortage caused by the displacement of existing workers and businesses.

The majority of respondents (59%) agreed that businesses in North Wales may have to look elsewhere for workforce skills as there may not be a sufficient local supply.

Summary

- 5.23 The Survey findings revealed that there is a clear issue for business concerning the lack of specialist skills amongst the County's workforce. It is evident from the respondents' views that many of the County and wider regions' workforces have more general workforce skills especially in relation to STEM skillsets.
- 5.24 Most respondents highlighted that they provide in-house training for their workers but are unlikely to outsource training courses to external companies, despite respondents raising concerns about staff requiring more on-the-job training to improve their productivity. Most of the respondents expressed concerns that the skill and peoples shortage will not improve in the future and will not fully meet the demands of their business needs as a consequence.

6.0 Current Supply of Further and Higher Education Skills in Conwy

Introduction

6.1 This section focuses on the current supply of Further Education [FE] and Higher Education [HE] skills in Conwy and the wider North Wales region. It is vital that FE and HE are taken into consideration as these institutions are pivotal in meeting future skills requirements for Conwy.

6.2 This section outlines the discussions The Mackinnon Partnership has undertaken with local education providers, skills representatives at the North Wales Economic Ambition Board [NWEAB] and the Welsh Government.

Further Education

6.3 Conwy's FE provision is in the hands of Coleg Llandrillo, which is part of Grŵp Llandrillo Menai [GLM]. The group, comprising Coleg Llandrillo, Coleg Menai and Coleg Meirion-Dwyfor, is Wales' largest FE institution and one of the largest FE college groups in the UK. GLM employs 2,000 staff and delivers courses to around 27,000 students (including over 1,000 Higher Education students) across Anglesey, Conwy, Denbighshire and Gwynedd³⁴.

6.4 Coleg Llandrillo offers over 4,000 full and part-time courses including:

- Academic courses at A-level, and through the International Baccalaureate;
- Vocational courses through BTECs and NVQs, Higher Nationals and Foundation Degrees, as well as apprenticeships; and,
- Honours Degrees and Postgraduate Studies offered in association with the University of Wales, Glyndŵr, Bangor and Cardiff Metropolitan University.

6.5 Coleg Llandrillo's £4.5m University Centre in Rhos-on-Sea (based within Conwy County) opened in September 2014, as a joint venture between the college and Bangor University. It offers a range of degree and other Higher Education courses, all focused on serving the local economy including:

- Construction:
 - (a) BSc Commercial Construction Management
 - (b) BEng Civil Engineering
 - (c) HNC Construction
 - (d) HNC Civil Engineering
- Engineering:
 - (a) HNC General Engineering
- Business / Tourism:
 - (a) BA Management of Travel and Tourism
 - (b) BA Library and Information Management
 - (c) FdA³⁵ Library and Information Management

³⁴ <http://iell.co.uk/llandrillo/>

³⁵ Foundation Degree (Arts)

- (d) FdA Management of Human Resources in Business
- (e) FdA Management of Accounting in Business
- (f) FdA Management of Retail in Business
- (g) FdSc³⁶ Computing Networking
- (h) BA Management of Travel and Tourism
- (i) BA Library and Information Management
- (j) FdA Library and Information Management
- (k) FdA Management of Human Resources in Business
- (l) FdA Management of Accounting in Business
- (m) FdA Management of Retail in Business
- (n) FdSc Computing Networking

Healthcare:

- (a) FdSc Healthcare Practice
- (b) FdSc Health and Social Care

Other:

- (a) FdSc Policing
- (b) FdA Photography
- (c) Post-Graduate Certificate in Education [i.e. teacher training]

6.6 The University Centre in Rhos is also the main focus for the Grŵp international student market. The Grŵp publishes a separate International Prospectus, promoting itself as 'Llandrillo Menai International' and focuses its attention on students from outside the European Union. The Principal's welcome notes that "The College is a past winner of the prestigious British Council Beacon Award for International Student Support".

Specialist Courses

6.7 As mentioned previously, CCBC accommodates three of GLM's campuses, in Abergele, Rhos-on-Sea and Colwyn Bay. Table 6.1 sets out the courses that GLM provides, based on academic / industry area. As of 2017/18, a third of all degree courses offered by GLM were related to the following academic areas:

- Art and Design and Photography (11%);
- Computing and Digital Technology (11%); and,
- Construction and Digital Technology (11%).

³⁶ Foundation Degree (Science)

Table 6.1 Courses offered by Grŵp Llandrillo Menai based on Academic Area (2018/19)

Academic Area	Degrees	Professional Qualifications	Apprenticeship
Access to Higher Education	2%	0%	0%
Agriculture	0%	0%	2%
Animal Studies and Veterinary Nursing	0%	0%	0%
Art & Design and Photography	11%	0%	0%
Business, Management, Law and Finance	5%	47%	23%
Computing and Digital Technology	11%	4%	12%
Construction and the Built Environment	11%	19%	18%
Counselling	2%	0%	0%
Deaf Studies and Sign Language	4%	2%	0%
Engineering and Power Technology	7%	4%	12%
English for Speakers of other Languages (ESOL)	2%	0%	0%
Health, Social Care and Childcare	9%	11%	19%
Hospitality and Catering	5%	5%	5%
Languages	0%	4%	0%
Library and Information Studies	7%	0%	0%
Marine Technology	0%	4%	0%
Media Production and Games Development	7%	4%	0%
Performing Arts, Music and Music Technology	2%	0%	0%
Police and Public Services	4%	0%	0%
Retail and Customer Service	0%	5%	5%
Sport and Outdoor Education	5%	0%	0%
Teacher Training	5%	0%	0%
Travel and Tourism	4%	0%	0%
Other	0%	0%	7%

Source: Grŵp Llandrillo Menai / Lichfields Analysis (2018/19 – academic year)

- 6.8 The majority of degree courses offer both full-time and part-time options which will allow flexibility for students. In contrast, almost half of professional qualifications offered by GLM are related to Business, Management, Law and Finance followed by Construction and the Built Environment (19%) and Health, Social Care and Childcare (11%). These are all courses that feed into CCBC's identified key growth sectors notably Health & Social Care and Construction.
- 6.9 Apprenticeships in these categories are associated with a number of CCBC's key growth sectors with the majority of apprenticeships at GLM generally catering for the following five skillsets:
- Business, Management, Law and Finance (23%);
 - Health, Social Care and Childcare (19%);
 - Construction and the Built Environment (18%);
 - Computing and Digital Technology (12%); and,
 - Engineering and Power Technology (12%).
- 6.10 The Welsh Government has committed to creating at least 100,000 quality apprenticeships over the next 5 years which are available to people of all ages³⁷.
- 6.11 Coleg Cambria, (another large college with regional reach), is also based in North Wales, although none of its five campuses are in Conwy. It has over 7,000 full-time and 20,000 part-time students³⁸. Coleg Cambria is in a partnership with Grŵp Llandrillo Menai and Adult

³⁷ The Welsh Government (2017): Employers Brochure 2017

³⁸ <https://www.cambria.ac.uk/>

Learning Wales providing training programmes across the six counties of North Wales (which of course includes Conwy) to help improve Skills for Employers & Employees [SEE]. Coleg Cambria provides vocational training centred around some of CCBC's key sectors including: Advanced Manufacturing and Health and Social Care.

6.12 As set out in Table 6.2, GLM provides courses that cater for skills that would be applicable to the key growth sectors identified by CCBC. It is important to note that a number of courses could apply to more than one sector such as engineering related courses. For instance, courses in engineering are likely to provide skillsets for the Construction and Advanced Materials & Manufacturing industries.

6.13 Table 6.2 shows that almost half (48.0%) of courses at GLM linked to the key growth sectors are within the Construction and Creative & Digital sectors. Both sectors have an employment rate above the UK levels as highlighted in Table 3.8.

Table 6.2 Courses offered by Grŵp Llandrillo Menai that are linked to CCBC's Key Growth Sectors

Key Growth Sectors	Degrees	Professional Qualifications	Apprenticeship	Total Number of Courses	Total Number of Courses (%)
Energy & environment	4	4	7	15	15.6%
Advanced materials & manufacturing	10	2	0	12	12.5%
Construction	6	6	11	23	24.0%
Creative & digital	17	3	3	23	24.0%
Health & social care	5	5	3	13	13.5%
Tourism & hospitality	5	0	0	5	5.2%
Food & drinks	3	2	0	5	5.2%
Total	50	22	24	96	

Source: Grŵp Llandrillo Menai / Lichfields Analysis

6.14 From our discussions with key developers within North Wales, it was emphasised that GLM already provides courses that actively meets their skill needs. Furthermore, GLM has a range of specialist services available on a number of their sites. These services provide consultancy support as well as an opportunity for local businesses to utilise cutting edge machinery and facilities. These sites include:

- Canolfan Arloesi Menai [CAM] – established in 2005 and located on the Llangefni campus CAM. This centre focuses on cutting edge manufacturing and design consultancy to help develop clients' ideas and expertise into real marketable products. The centre aims to encourage innovation, entrepreneurship and creativity for the manufacturing sector. Services offered at the centre include product design, 3D scanning, manufacturing consultancy, rapid prototyping and training, all using the very latest technology and software. Despite being situated outside the County, the North Wales connection means that CCBC could work in partnership to enhance opportunities in the Advanced Materials and Manufacturing sector, in particular with CAM.
- Food Technology Centre [FTC] – this site is located on Llangefni campus FTC's and was established in 1999. This site is primarily focused on transferring scientific knowledge to the food industry in Wales and across the UK. FTC's facilities include processing halls for fresh meat, dairy products, prepared food product development test kitchen and an analytical laboratory. As Conwy County already has a strong food and drinks sector, the FTC could play an essential role in developing key partnerships with local businesses in Conwy to drive growth in this key growth sector.

- Canolfan Ynni, Coleg Menai's Energy Centre - Canolfan Ynni, Coleg Menai's Energy Centre is located on the Llangefni site. It provides a facility to deliver the skills needed to underpin a new generation of energy production. Programmes of study are available both for full and part-time students who wish to seek employment within the developing energy sector in North Wales. The Grŵp Llandrillo Menai has worked closely with the National Skills Academy Nuclear [NSAN] and COGENT, the sector skills council for the Nuclear Industry, to provide qualifications that meet the anticipated skills demand of the decommissioning sector. Specialist training involving instrumentation and control technologies, welding and fabrication as well as sustainable energy is continually being developed and delivered at this centre. This has clear and very strong links to enhance the 'energy and environment' sector which is a key growth driver in North Wales.
- Heavy Plant Centre, Llangefni - In partnership with the CITB's National Construction College [NCC], Coleg Menai now offers a range of specialist construction training programmes. The courses, which have been developed to support the Energy Island Programme, include the operation of various items of heavy plant. These skills which will be in demand at the construction phase of the energy related projects across North Wales during the next decade. This strongly links with the 'Energy and Environment' and 'Construction' sectors which allows for transferable skills.

Higher Education

- 6.15 In 2017, CCBC published its draft Economic Strategy 2017-2027 which has ambitions to "establish a dedicated Higher Education presence in the County" by upskilling the local workforce to meet the skills needs arising from these key growth sectors. Currently, Conwy County does not have any HE institutions within its local authority boundary— although as set out above there are already two established HE institutions elsewhere in North Wales.
- 6.16 The Welsh Government is responsible for Higher Education provision across Wales and currently provide funding for Bangor and Wrexham Glyndwr universities. These two universities attract students and companies from across Wales and the rest of the UK.

Bangor University

- 6.17 Bangor University was founded in Gwynedd in 1884 and is currently host to over 11,000 students from 85 different countries³⁹. Bangor's location on the North Wales coast has helped it to develop a renowned Ocean Science faculty. It has also built up a strong reputation for Accounting & Finance, Sport Science and Electronic Engineering. The latest National Student Survey ranks Bangor University in the top 15 UK universities for student satisfaction, and the best in Wales. International students are offered free English language courses and support, which naturally attracts a wide range of students from overseas.

Specialist Courses

- 6.18 Table 6.3 sets out the courses that Bangor University provides based on academic / industry area. As of 2018/19, over half of all undergraduate degree courses offered by Bangor University were related to the following academic areas:
- Languages, Literatures and Linguistics (26.0%);
 - History, Philosophy and Social Sciences (14.6%); and,
 - Business (12.4%).

³⁹ <http://www.studyin-uk.com/profiles/university/bangor/>

6.19 In contrast, there is a different composition in terms of the proportion of postgraduate degrees, which are most strongly represented across the following academic areas:

- Business (22.4%);
- Education and Human Development (15.6%); and,
- Psychology (9.8%).

Table 6.3 Degree course provision by Bangor University (2018/19)

Subject Areas	Undergraduate Degrees (% of total Courses)	Postgraduate Degrees (% of total Courses)
Business	12.4%	22.4%
Computer Science and Electronic Engineering	3.7%	3.9%
Education and Human Development	3.0%	15.6%
Health Sciences	3.3%	3.9%
History, Philosophy and Social Sciences	14.6%	8.3%
Languages, Literatures and Linguistics	26.0%	6.8%
Law	4.6%	7.3%
Medical Sciences	0.9%	3.4%
Music and Media	9.8%	3.4%
Natural Sciences	9.2%	8.3%
Ocean Sciences	3.3%	2.4%
Psychology	3.7%	9.8%
Sport, Health and Exercise Sciences	2.4%	2.0%
Welsh (Cymraeg)	3.3%	2.4%

Source: Bangor University / Lichfields Analysis

6.20 As shown in Table 6.3, the majority of undergraduate degrees are centred around social sciences and languages which reflects the demand for these courses, Bangor University also provides specialist courses within Ocean Sciences, with the School of Ocean Sciences comprising one of the largest university Marine Science departments in Europe. This department's courses align well with CCBC's drive for economic growth within the energy and environment sector.

6.21 Table 6.4 shows that almost two thirds (61.5%) of undergraduate courses at Bangor University linked to key growth sectors are within the Creative & Digital sector, followed by Energy and Environment (18.9%) and Advanced Materials and Manufacturing (9.1%).

6.22 In terms of postgraduate degrees, the composition is more evenly distributed to courses linked to the four key growth sectors outlined above:

- Energy & Environment;
- Advanced Materials & Manufacturing;
- Creative & Digital; and,
- Health & Social Sectors.

Table 6.4 Courses offered by Bangor University that are linked to CCBC's Key Growth Sectors

	Total Number of Undergraduate Courses (%)	Total Number of Postgraduate Courses (%)
Energy & environment	18.9%	28.0%
Advanced materials & manufacturing	9.1%	21.7%
Construction	N/A	N/A
Creative & digital	61.5%	27.3%
Health & social care	10.6%	23.1%
Tourism & hospitality	N/A	N/A
Food & drinks	N/A	N/A

Source: Bangor University / Lichfields Analysis

- 6.23 Bangor University has already formed strong linkages with the major developments summarised in Section 4.0. For example, M-Sparc which has been identified as one of the major developments across North Wales, is a wholly owned subsidiary of Bangor University and became operational in late 2017. The site is home to a Science Park on Anglesey with a focus on driving growth in knowledge based sciences, with an early focus on low carbon energy, the environment and ICT sectors. M-Sparc has very strong ties with Bangor University, in particular with the Colleges of Physical and Applied Sciences, Natural Science and Behavioural Science.
- 6.24 As mentioned in Section 4.0, Bangor University is home to Wales's first nuclear research institute (the Nuclear Research Institute). The facility has been established with funding from the Welsh Government's Sêr Cymru programme, European Regional Development Fund and Bangor University. The Nuclear Research Institute aims to take advantage of capital investments from nuclear decommissioning happening nearby in Anglesey.
- 6.25 As part of the University's presence in the energy and environment sector, Bangor University and Imperial College London have partnered with Hitachi-GE in providing technical expertise and support with a joint Boiling Water Reactor [BWR] Research Hub and Network being established⁴⁰. The Network brings together the UK research base with Hitachi's nuclear researchers to help develop future generations of Boiling Water Reactor technology.

Wrexham Glyndŵr University

- 6.26 Wrexham Glyndŵr University [WGU] was formally granted university status in 2008, although education services have been offered from the Wrexham sites since 1887, when the university was known as the Wrexham School of Science and Art. Previously, WGU was also known as the North-East Wales Institute of Higher Education [NEWI]. At present, WGU does not have an active presence in CCBC. WGU is situated in nearby Wrexham County with the remaining two campuses based in Flintshire and Denbighshire.
- 6.27 WGU has three campuses that reflect the University's specialisms as well as providing a number of facilities for students. Whilst the majority of courses are held at the Wrexham campus, there is also a dedicated rural campus in Northop specialising in animal science and biodiversity, whilst a further optoelectronics research centre is based in St Asaph. The University is divided into four academic schools – The School of Creative Arts, The School of Social and Life Sciences, The School of Applied Science, Computing and Engineering and The North Wales Business School.

⁴⁰ <https://www.bwrhub.ac.uk/en/about/>

Specialist Courses

6.28 Table 6.5 sets out the undergraduate courses that WGU provides based on academic / industry area. For the 2018/19 academic year, over a third of all undergraduate degree courses offered by WGU were related to the following academic areas:

- Art and Design (16.7%);
- Health, Psychology & Social Care (11.8%); and,
- Engineering (9.7%).⁴¹

Table 6.5 Undergraduate courses offered by Wrexham Glyndwr University based on Academic Area (2018/19)

Subject Areas	Undergraduate Degrees (% of total Courses provided)
Animal & Plant Biology	4.2%
Art and Design	16.7%
Built Environment	4.2%
Business and Management	8.3%
Complementary Medicine	3.5%
Computing	9.7%
Creative Media Technology	6.9%
Education, Family and Childhood Studies	6.9%
Engineering	9.7%
Health, Psychology & Social Care	11.8%
Humanities	5.6%
Journalism and Media	2.1%
Science and Environment	1.4%
Society	4.9%
Sport and Exercise Sciences	4.2%

Source: Wrexham Glyndwr University / Lichfields Analysis

6.29 As set out in Table 6.6, over half of the postgraduate courses provided by WGU are in the following subject areas:

- Engineering (18.8%);
- Health and Medical Sciences (14.6%);
- Social Care (14.6%); and,
- Business and Management (10.4%).

6.30 WGU has a strong focus on engineering, health and social care science degrees at both undergraduate and postgraduate levels which are connected to Conwy's target growth sectors.

⁴¹ Information obtained from Wrexham Glyndwr University's website

Table 6.6 Postgraduate courses offered by Wrexham Glyndwr University based on Academic Area

Subject Areas	Postgraduate Degrees (% of total Courses provided)
Art & Design	6.3%
Built Environment	2.1%
Business and Management	10.4%
Computing	12.5%
Creative Media	2.1%
Education	10.4%
Engineering	18.8%
Health and Medical Studies	14.6%
Humanities	2.1%
Psychology	2.1%
Social Care	14.6%
Criminal Justice	2.1%
Sport and Exercise Sciences	2.1%

Source: Wrexham Glyndwr University / Lichfields Analysis

6.31 Table 6.7 shows that more than half of undergraduate courses at WGU that are linked to the key growth sectors are within the Creative & Digital (51.6%) sector, followed by the Health & Social Care (18.3%), Advanced Materials & Manufacturing (15.1%) and Construction (8.6%) sectors.

6.32 In terms of postgraduate degrees, the composition of courses linked to key growth sectors are focused on the following sectors: Advanced Materials & Manufacturing (37.5%), Creative & Digital (29.2%), Health & Social Care (29.2%) and Construction (4.2%).

Table 6.7 Courses offered by Wrexham Glyndwr University that are linked to CCBC's Key Growth Sectors (2018/19)

Key Growth Sector	Total Number of Undergraduate Courses (%)	Total Number of Postgraduate Courses (%)
Energy & environment	8.6%	0.0%
Advanced materials & manufacturing	15.1%	37.5%
Construction	6.5%	4.2%
Creative & digital	51.6%	29.2%
Health & social care	18.3%	29.2%
Tourism & hospitality	0.0%	0.0%
Food & drinks	0.0%	0.0%

Source: Wrexham Glyndwr University / Lichfields Analysis

6.33 One of the major components of WGU's strategy is 'Campus 2025' which sets out the University's ambition and commitment to improving all areas of their campuses. Campus 2025 is WGU's Estates and Learning Environment Strategy and is underpinned by similar principles within the University's Strategic Framework (this document sets out the ambition of the University and will guide development between 2015 and 2020). Campus 2025 focuses on enhancing the student's experience by providing an improved infrastructure that supports learning and state-of-art facilities.

6.34 WGU has a growing range of partnerships with universities, colleges and private education providers elsewhere in the UK and further afield. The University has an established connection with GLM on a number of courses which include:

- BA (Hons) Public and Social Policy (full-time);
- HNC Electrical & Electronic Technology (part-time);

- HNC Mechanical Technology (part-time);
- HNC Civil Engineering (part-time);
- HNC Building Studies (part-time); and,
- FdA Art and Design.

6.35 It is evident these courses are strongly linked to a number of Conwy's key growth drivers such as the Advanced Materials and Manufacturing, Construction and Creative & Digital sectors. From discussion with the University, potential future markets could be centred around demand in applied engineering, IT (e.g. cyber-security), digital, optics.

6.36 The university is seeking to address that future demand, either on its own or in partnership (for instance with GLM). This means both at undergraduate level and through apprenticeships. For example, they are in the early stages of discussing a new composites apprenticeship with GLM – to meet an area of future demand that is otherwise unmet in North Wales.

Education Providers Consultation

6.37 Discussions were held with senior representatives of Bangor and Wrexham Glyndwr universities and Grŵp Llandrillo Menai, each of which might reasonably expect to be involved in any new Higher Education centre in Conwy County. In the absence of evidence of significant unmet need none of the three could see a case for creating a new Higher Education facility.

6.38 Though rivals in many respects, the two universities collaborate with each other, and also with Grŵp Llandrillo Menai: there is a good deal of joint working. For example, the College and Bangor University operate complementary management schools in Bangor; the two universities work together on training for allied healthcare professions; and all three partners work (with Coleg Cambria) on an EU-funded project called The Academy to provide bespoke higher-level training for growing businesses. There is therefore a strong basis for further collaboration on Higher Education provision in Conwy.

6.39 Llandrillo College pointed out that it already operates a Higher Education centre within the Conwy County, its £4.5m University Centre in Rhos-on-Sea, commenting that if the Council believes that centre falls short in some way, an obvious starting-point is to discuss with the college what scope there is to change the centre's focus. The College indicated that it would be happy to have that conversation with CCBC.

6.40 The different institutions all routinely monitor the changing demand for their services. WGU, for example, has identified potential new demand in some aspects of applied engineering, IT (notably cyber-security), digital skills, and optics. In each case the University is seeking to address that demand, either on its own or in partnership, (for example with Grŵp Llandrillo Menai). This means both at undergraduate level and through apprenticeships – where, for example, the University is in the early stages of discussing a new Composites apprenticeship with the College.

6.41 None of the three institutions, suggested that there was any new need which cannot be managed through this existing process or something similar to it, i.e. no need which is different in either scale or nature, and which therefore requires a wholly new centre in Conwy.

6.42 Beyond any assessment of increased demand, there is also a question around simply maintaining existing levels of Higher Education, at least for the college. Alongside long-term demographic decline in North Wales (i.e. the slow reduction in numbers of young people who dominate entry to Higher Education), the sector is likely to see a drop in the numbers of mature students (aged 21 or over) attending access courses to Higher Education. That has been a big market for many years, tapping into interest from those who missed out at an earlier age, but as

the proportion of school-leavers attending Higher Education has increased, so the mature market has declined. It has been a major part of what Llandrillo College does, as it sought to widen access and participation, complementing the work of their university partners, particularly Bangor.

- 6.43 Partly as a consequence of this, the college is working with Bangor University to explore the scope for degree level apprenticeships, currently a novelty in Wales, but nevertheless a fast-growing part of the education scene in England.

Opportunities in the health sector

- 6.44 All three institutions directly addressed the possibility of making the health sector - and specifically a dedicated medical school - the cornerstone of any new Higher Education facility in Conwy.
- 6.45 Both universities are well aware of the market; but commented that the key constraint on growth is not around facilities - buildings and equipment - but the lack of placements. Medical students are required to do structured placements as part of their studies, properly supervised with detailed learning outcomes, and many NHS employers struggle for operational reasons to offer more placements than those currently available. As Wrexham Glyndwr University is unable to meet current demand, any new establishment in Conwy would face exactly the same problem.
- 6.46 Any proposal from a Health Board to increase the number of medical places in North Wales would need to be approved by a new body, Health Education and Improvement Wales [HEIW], which has taken over the role from Workforce and Education Development Services. As now, HEIW would rightly be expected to scrutinise any proposals very carefully.

Funding mechanisms

- 6.47 The funding package for any new Higher Education centre in Conwy would need to be shaped once there is agreement on the purpose and nature of the centre, and the nature of the partnership behind it. The more exciting a project appears to be, the more scope there is to draw in funding from other sources, and on a larger scale. Nonetheless, some key features are clear.
- 6.48 The norm for projects of this nature is for there to be a "cocktail" of funding, with contributions from a number of sources. Depending on the nature of the partnership (which in turn flows from the purpose and nature of the centre), funding sources would almost certainly include the following:
- the institution or institutions involved;
 - the local authority or authorities involved;
 - some national funding through the Welsh Government or its agencies; and,
 - EU Structural Funds (until the EU referendum intervened).
- 6.49 The majority of Welsh Government funding for HE capital funding was removed in 2012. Universities now need to borrow to make capital investments. Bangor University's latest accounts, for example, refer to "an exciting and ambitious strategy for our estate... backed by funding from the European Investment Bank" (another source which may be closed post-Brexit).

- 6.50 Similarly, in its latest Financial Statements (July 2017), Grŵp Llandrillo Menai notes this:
- Balances held in cash and on short term deposit totalled £12.4m at the year-end (2016: £11.5m) and bank loan balances had reduced to £1.66m (2016: £28m). Cash holdings are important as the Grŵp must contribute towards the cost of capital projects undertaken with the Welsh Government. Without surpluses to generate cash the Grŵp would be unable to invest in its estate. Despite the reported deficit the Grŵp remains cash generative, enabling it to continue to invest in capital improvements for the benefit of learners.
- 6.51 Much the largest part of university funding now comes through students' tuition fees, rather than through central grants, but the Higher Education Funding Council for Wales [HEFCW] retains an annual grant programme. Allocations are subject to an annual process (the 2017-18 budget was finalised in early January 2017), and all nine universities in Wales are eligible: success cannot therefore be assumed. HEFCW has estimated that its total direct funding for 2018-19 might well be £115m, though the great majority of that is already (in reality) spoken for to cover running costs. As an indication of the scale of the more freely available funds, for 2017-18, HEFCW allocated £506,000 to "Support for collaboration between HE and FE".
- 6.52 As for participating local authorities, in this case it would clearly be CCBC and perhaps neighbouring authorities depending on the nature of any proposed centre.
- 6.53 EU Structural Funds have been a central part of any such funding cocktail for more than a generation, but the referendum decision to leave the European Union [EU] will mean the end of these funds. The UK Government has announced that there will be a replacement "Shared Prosperity Fund", but beyond that announcement there is no further information yet on what that means. A consultation paper is being lined-up for publication this year, but the politics of Brexit may mean it is delayed until late 2019.
- 6.54 In March 2018 the Welsh Local Government Association [WLGA] published its paper Regional Investment in Wales after Brexit. The WLGA comments that "a key priority for Wales is to understand the rules of engagement for accessing any replacement funding after Brexit". The Association goes on to say:
- "Any replacement EU Structural funds should adhere to the key principles that underpin EU Cohesion Policy, i.e. partnership, multi-annual funding and primarily a focus on areas of need in order to address the persistent gap between the economic performance of areas of need and areas of opportunity".
- 6.55 These comments indicate just how much work is yet to be done before the nature of post-Brexit structural funding is clear: even the higher-level design features are unclear, such as whether arrangements will be devolved to Wales at all, whether the EU's approach of working towards "convergence" for poorer areas will continue, and whether there will continue to be multi-year, multi-objective, programmes (as now), underpinned by strategic partnerships.
- 6.56 With the politics of Brexit in such flux, it is not at all clear when arrangements for post-Brexit structural funds will reach the stage when CCBC and its partners can start planning.
- 6.57 There are a number of implications which flow from using a funding 'cocktail'. The principle one is that the project champions need to build a coalition of interest, in which each partner is sufficiently committed and enthusiastic that their share of the funding wins through the internal competition for support, so that partners can get behind a shared prospectus. There may not be formal competition, but there is always competition in reality because the number of appealing projects always exceeds the available funds. That therefore puts a premium on building a robust case for investment, tested thoroughly against all the usual principles of value for money which are applied in the UK, ultimately deriving from Treasury rules.

Conclusion

- 6.58 It is no small undertaking to win support for a new Higher Education centre, and the funding needed first to build it, then to sustain it over the long-term. There needs to be a strong case, with strong supporting evidence that any new centre would either solve an existing problem of some magnitude or create a significant new benefit. A successful case would need to explain what need or opportunity exists which could not be dealt with by any of the three existing Higher Education providers, either singly or in partnership, or by the existing University Centre in Rhos.
- 6.59 It may be significant that none of the three interviewees had ever been involved in a discussion with CCBC colleagues about the possibility of a new HE centre in Conwy, nor knew of any such discussion with any of their colleagues. All expressed a willingness to talk with the Council, to understand what concerns – or hopes – had led to the suggestion of a new Higher Education centre in Conwy, and to see what might be done about them. All indicated that there is a good deal of scope to use existing facilities differently, if there is a business case for doing so, rather than attempting to create anything new.

7.0 Alignment of Skills Demand and Supply

7.1 CCBC's emerging evidence base is clear on the key growth sectors that will facilitate future economic growth for the County's economy. A key component of this Skills Needs Assessment report is taking into consideration the interplay between skills supply and demand requirements in the future.

7.2 This section assesses the demand for skills generated by the key growth sectors and development projects against the courses offered by existing educational facilities across North Wales. The key growth sectors include:

- Energy & Environment;
- Advanced Materials & Manufacturing;
- Construction;
- Creative & Digital;
- Health & Social Care;
- Tourism & Hospitality; and,
- Food & Drinks.

Energy & Environment

Current Situation

7.3 According to CCBC, the Energy and Environment sector is a key driver and is intended to generate future growth. Economic growth within this sector will primarily focus on skills related to energy generation, low carbon technologies and processing. This will require the workforce and businesses to be well-equipped to take advantage of the potential supply chain opportunities that could arise from a number of the major transformational projects within this sector notably Colwyn Bay Tidal Lagoon and Wrexham Energy Centre.

7.4 According to the Welsh Government, the Conwy's Energy and Environment sector employed 4,900 people in 2017 and accounted for 14% of North Wales' jobs within the region's sector⁴². Table 7.1 sets out the company sizes across North Wales, Conwy has 11 companies that have been identified within the Energy and Environment sector, which is the lowest figure out of all the North Wales' local authorities.

Table 7.1 Company Sizes within the Energy and Environmental Sector in North Wales (2016)

Area	Micro (0-9)	Small (10-49)	Medium (50-249)	Large (250+)	Total
Anglesey	24	6	1	3	33
Gwynedd	9	9	3	0	21
Conwy	3	5	2	1	11
Denbighshire	11	10	0	1	22
Flintshire	9	17	11	2	39
Wrexham	10	6	4	3	23

Source: North Wales Economic Ambition Board / Energy & Environmental Business Directory 2016

⁴² Welsh Government (2018): Priority Sector Statistics, 2017 (Sub-Wales)

- 7.5 It is important to note that there are difficulties defining Conwy and the wider region's current skill set to meet the future demands of the Energy and Environment sector. This was acknowledged in the NWEAB's Regional Skills and Employment Plan (2017) which stated:
- "Due to the nature of cross industry SIC codes representing the energy and environment sector, it isn't possible to get an accurate break down of occupations at different levels since this sector is representing 3 SIC code sectors – energy and water, construction and manufacturing" [Page 2]
- 7.6 This demonstrates the struggle in identifying the true number of appropriately skilled workers in this sector, in particular, as a number of these sectors have transferable skills. However, major transformational projects (within the energy and environment sectors) will require authorities across the wider North Wales region to collaborate in providing the local labour supply to meet demand. A number of major projects that are completed / under construction or proposed include:
- Colwyn Bay Tidal Lagoon;
 - Dong Energy;
 - Grŵp Llandrillo Menai Llangefni Campus Extension;
 - M-Sparc;
 - Minesto;
 - Parc Adfer Deeside;
 - RWE Innology; and,
 - Wrexham Energy Centre.
- 7.7 The majority of these projects would require skills from a range of skilled contractors, engineers and project managers. Despite most of these projects taking place outside of Conwy, the emphasis would be on the wider North Wales region to meet the demands and opportunities arising from these projects and Conwy would clearly have a role to play.
- 7.8 Conwy County is also likely to benefit from supply chain opportunities which are likely to spin off from these major projects across North Wales. It is expected that 200 companies from North Wales will be a part of the Colwyn Bay Tidal Lagoon's supply chain programme.
- 7.9 In terms of the skills supply, it is evident from discussions with key developers and stakeholders that there is a skills shortage for certain occupations in the wider region. Within the Energy and Environment sector, there are concerns associated with the STEM-specific technical qualifications and expertise. This has been accelerated by an ageing workforce and declining numbers of students taking STEM subjects within schools, colleges and universities.
- Skills Gap / Surplus
- 7.10 The difficulty in identifying employment and qualification levels for the Energy and Environment sector in Conwy and other areas has already been highlighted. However, the UK Commission for Employment and Skills [UKCES] Working Futures has produced labour market projections for the period 2014 to 2024. The Working Futures considers patterns of employment and productivity in terms of the historical trend and future projections for the growth and decline of industries and occupations, and the implications for skills.
- 7.11 According to Working Futures 2014-2024, the energy and environment sector's need for higher qualified staff shifted in recent years and is likely to continue this trend in the coming years.

Since 1994 there has been an increase in the need for SOC 1 type occupations (such as managers, professionals and associate professionals) in the Energy and Environment sector across North Wales.

Table 7.2 Changes to % of employment by levels within the Energy & Environment Sector in North Wales (2014-2024)

	Managers, Directors, & Senior Officials (SOC1)	Professional Occupations (SOC2)	Associate Professional and Technical Occupations (SOC3)	Skilled Trades Occupations (SOC5)	Process, Plant & Machine Operatives (SOC8)
2014	7.5%	12.3%	9.8%	33.1%	9.7%
2019	8.3%	13.5%	10.5%	32.2%	8.9%
2024	8.7%	13.9%	10.7%	32.1%	8.7%
Net Change	+26.5%	+23.3%	+20.4%	+6.3%	-2.5%
Replacement Demand	40.6%	38.8%	35.8%	33.5%	32.1%
Total Demand Needed	67.1%	62.0%	56.2%	39.9%	29.6%

Source: Working Futures Projections 2014-2024 / North Wales Economic Ambition Board

- 7.12 Table 7.2 shows the change in employment levels within the energy and environment sector from 2004 to 2024 across North Wales. The changing composition of occupations in the energy and environment sector from 2014 up to 2024 shows a considerable increase in demand for four out of the five occupations within the sector. This suggests that in the future, occupations which require specialist and higher-level qualifications are expected to be in higher demand in the sector.
- 7.13 The Working Futures projections takes into account 'replacement demand' which is defined as 'the job openings created by the outflow of workers from the labour force'⁴³. This generally relates to workers that leave the labour market due to a variety of permanent and temporary reasons. As shown in Table 7.2, all five occupation types are expected to increase in employment levels between 2014 and 2024. Ultimately, replacement demand within the sector will lead to significant increases in the total demand for relevant occupations related to the sector.
- 7.14 Replacement demand effectively means that these occupations would require additional workers on top of those jobs being replaced. It is anticipated that there will be a strong replacement demand of 40.6% for SOC 1 type occupations (managers, directors, & senior officials) between 2014 to 2024. All five occupation types are expected to see replacement demand increase by more than 30%. Despite these datasets focusing on North Wales, many of the major key projects within the Energy and Environment sector will require future labour supply from Conwy and neighbouring local authorities.
- 7.15 The latest Working Futures projections also focus on the formal qualification levels for defining and measuring skills in the labour market. As part of NWEAB's Regional Skills and Employment Plan 2017, the qualification profile of future employment was analysed for the energy and environment sector in North Wales. The Working Futures projections are based on the following qualification levels:
- No Qualification

⁴³ UKCES (2014): Working Futures 2014-2024 Headline Report

- Level 1: GCSE (grades D-G) / BTEC award, certificate and diploma level 1;
- Level 2: GCSE (grades A*-C) / NVQ level 2;
- Level 3: AS and A level / BTEC National;
- Levels 4-6: Certificate of Higher Education (Level 4) / Foundation degree (Level 5) / Bachelor's degree (Level 6); and,
- Levels 7-8: Master's degree (Level 7) / Doctorate (Level 8).

7.16 As shown in Table 7.3, the future labour supply with Levels 4-6 and 7-8 qualifications are projected to increase across North Wales by 57.6% and 32.5% respectively between 2014 and 2024. This demonstrates that there is likely to be growing need for employees with higher qualification levels.

Table 7.3 Implications for qualifications by levels required in the North Wales Energy & Environment Sector

	% share 2014	% share 2024	% change 2014-2024	Replacement Demand % share
QCF Levels 7-8	6.1%	7.4%	32.5%	6.1%
QCF Levels 4-6	26.1%	37.6%	57.6%	26.1%
QCF Levels 3	19.3%	17.0%	-3.9%	19.3%
QCF Levels 2	21.3%	21.3%	9.4%	21.3%
QCF Levels 1	15.8%	12.6%	-13.1%	15.8%
No Qualification	11.3%	4.1%	-60.3%	11.3%
Total	100.0%	100.0%	9.4%	100.0%

Source: Working Futures Projections 2014-2024 / North Wales Economic Ambition Board

Next Steps

7.17 Discussions with education and business stakeholders within the Energy and Environment sector clarified that there is likely to be a future demand for a more highly skilled workforce within the sector. This will be driven by key transformational projects taking place across North Wales and the retirement of many existing highly qualified staff in this sector.

7.18 To address this, the key developers have been proactively building partnerships with existing education institutions to improve specific skillsets of North Wales' existing workforce. There is therefore a risk that a new Higher Education facility within Conwy could raise the issue of 'doubling up' on relevant courses within the Environment and Energy sector. For instance, a number of degree courses are already provided by Bangor and Wrexham Glyndŵr universities which include:

- Environmental Science BSc (Hons) – Bangor University;
- Marine Environmental Studies BSc (Hons) – Bangor University;
- Marine Biology BSc (Hons) – Bangor University;
- Ocean Science BSc (Hons) – Bangor University; and,
- BEng (Hons) Renewable and Sustainable Engineering – Wrexham Glyndŵr University.

7.19 As demonstrated above these are some of the courses available at both universities to cater for the future skills demand in the Energy and Environment sector. It is evident that Bangor University is more equipped to provide sector-related courses to upskill the County and North Wales' future workforce.

Advanced Materials & Manufacturing

Current Situation

- 7.20 According to Welsh Government data, the Advanced Manufacturing and Materials sector employed 800 people directly in North Wales in 2017, which accounted for 4% of North Wales' jobs within the sector. However, this sector is currently poorly represented in Conwy; between 2012 and 2017, the number of employees had fallen by 300 (-27%) in Conwy County, a steeper fall than to North Wales (+10%) or Wales (-1%) as a whole⁴⁴.
- 7.21 According to NWEAB's Advanced Manufacturing directory, the major employers in Conwy within this sector include: A2B Plastics Ltd; Castle Diamond Technology; Consort Precision Diamond Ltd; Danline International Ltd; and, Prism Medical UK.
- 7.22 In 2016, NWEAB published their latest Advanced Manufacturing Business Directory for North Wales, which identified over 153 businesses within the Advanced Manufacturing and Materials sector across North Wales⁴⁵. This figure includes businesses located in three Enterprise Zones (none are currently in Conwy) across North Wales. Many of the major epicentres for the Advanced Manufacturing and Materials sector are situated outside of Conwy County, notably:
- Deeside Enterprise Zone;
 - Northern Gateway;
 - Wrexham Industrial Park;
 - St. Asaph Business Park;
 - Parc Byrn Cegin, Bangor; and,
 - Parc Cybi, Holyhead.
- 7.23 These locations are already establishing a reputation for clustering major Advanced Manufacturing companies. None of these key employment sites are located within Conwy, however, there are clear benefits to Conwy through the wider supply-chain benefits and employment opportunities.
- 7.24 Table 7.4 sets out the size of manufacturing companies across the North Wales' local authorities. As demonstrated in Table 7.4, the manufacturing sector within Conwy is dominated by micro-businesses which make up 84% of all manufacturing companies within the County's sector.

Table 7.4 Company Sizes within the Manufacturing Sector in North Wales (2018)

Area	Micro (0 to 9)	Small (10 to 49)	Medium-sized (50 to 249)	Large (250+)	Total
Anglesey	90	20	0	0	110
Conwy	155	25	5	0	185
Denbighshire	155	30	5	0	190
Flintshire	295	55	35	5	390
Gwynedd	195	30	10	0	235
Wrexham	215	65	25	5	310

Source: Inter Departmental Business Register (ONS)

- 7.25 The dominance of smaller companies in Conwy and other authorities may be linked to the increasing automation within this sector. Stakeholders suggested that there remained critical

⁴⁴ Welsh Government (2018): Priority Sector Statistics, 2017 (Sub-Wales)

⁴⁵ <https://northwalseab.co.uk/business-opportunities/business-directories>

skill shortages for STEM-related occupations such as engineers, scientists and technological roles.

Skills Gap / Surplus

- 7.26 According to the latest Working Futures, between 2014 and 2024 it is anticipated that the industry will need a higher qualified labour supply. Table 7.5 demonstrates that the proportion of higher skilled occupations (SOC1 and SOC2) are expected to rise. However, the sector is likely to experience a decline in (the need for) employees within the SOC3, SOC 5 and SOC8 occupations over the same period. This is influenced by an anticipated advance in new technologies which will require higher skilled employees that can adapt to innovation and commercialisation changes likely to affect this highly competitive sector in the future.
- 7.27 In terms of replacement demand, it is expected that the sector will experience a significant loss of experienced individuals across all levels due to recruitment.
- 7.28 Total sector-related demand for all is likely to increase from 12% SOC8 occupations to 39% for SOC1 roles by 2024 demonstrating the critical need to address future shortages across all skills levels in the Advanced Manufacturing and Materials sector.
- 7.29 Key stakeholders within the manufacturing sector stated that challenges existed in promoting and raising awareness of future job and employment opportunities amongst young people. This is evidently an area in which CCBC would have a role to play working with key stakeholders to promote awareness of employment and educational opportunities within the advanced manufacturing sector.

Table 7.5 Changes to percentage of employment levels within the manufacturing sector in North Wales (2014-2024)

	Managers Directors, & Senior Officials (SOC1)	Professional Occupations (SOC2)	Associate Professional and Technical Occupations (SOC3)	Skilled Trades Occupations (SOC5)	Process, Plant & Machine Operatives (SOC8)
2014	6.5%	8.7%	7.8%	27.9%	35.0%
2019	7.2%	9.5%	8.4%	27.3%	32.9%
2024	7.5%	9.7%	8.5%	26.8%	32.8%
Net Change	+2.8%	+0.4%	-2.7%	-14.3%	-16.4%
Replacement Demand	35.9%	32.5%	32.5%	30.4%	28.3%
Total Demand Needed	38.7%	32.9%	29.8%	16.1%	11.9%

Source: Working Futures Projections 2014-2024 / North Wales Economic Ambition Board (2017)

- 7.30 The latest Working Futures projections focused on the future qualification levels for the Advanced Manufacturing and Materials sector. The changing qualification profile reflects both supply and demand factors; only employees with qualification levels 4-6 are expected to increase between 2014 and 2024.
- 7.31 Table 7.6 shows net declines in employees at all skills levels apart from qualification levels 4-6 between 2014 and 2024. However, the forecast decreases in demand and supply over the 10-year period has been offset by the replacement of current employees within the sector that are expected to retire and leave. The replacement demand for all qualification levels within the sector ensures we can still expect job openings across all the qualification levels.

Table 7.6 Implications for qualifications by levels required within the manufacturing sector in North Wales (2014-2024)

	% share 2014	% share 2024	% change 2014-2024	Replacement Demand % share
QCF Levels 7-8	4.6%	5.0%	-3.0%	4.6%
QCF Levels 4-6	19.9%	30.8%	38.3%	19.9%
QCF Levels 3	25.0%	23.0%	-18.2%	25.0%
QCF Levels 2	23.4%	25.0%	-4.7%	23.4%
QCF Levels 1	17.1%	13.7%	-28.5%	17.1%
No Qualification	10.0%	2.6%	-77.0%	10.0%
Total	100.0%	100.0%	-10.7%	100.0%

Source: Working Futures Projections 2014-2024 / North Wales Economic Ambition Board (2017)

Next Steps

- 7.32 During our conversations with key developers and education providers it was clear that there are challenges regarding the awareness of future job and employment opportunities that exist for young people within the Advanced Manufacturing and Materials sector. As with the energy and environment sector, much of the manufacturing skill shortages were linked to the following occupations:
- Engineering;
 - Scientists; and,
 - Technologist occupations.
- 7.33 Essential skills required from existing and future employees within the sector include project management, marketing and influential skills, especially amongst higher skilled occupations.
- 7.34 Despite there being a limited number of key employment clusters in Conwy County for advanced manufacturing companies – CCBC needs to support local businesses to enable them to understand and take advantage of the supply chain opportunities.
- 7.35 On the educational side, more awareness of apprenticeships, training and skills development will be needed for Conwy's current and future workforce down to secondary school level. This should result in CCBC collaborating with existing education providers rather than establishing a new Higher Education facility.
- 7.36 In terms of education provision and supply, the region is fully equipped with Further and Higher Education course provision for the Advanced Manufacturing Sector. For instance, 12.5% of courses provided at Grŵp Llandrillo Menai are related to this sector demonstrating that there are a number of Further Education course provision for this sector. Both North Welsh universities provide degree courses in the following subject areas (related to the Advanced Manufacturing sector):
- Electrical / Computer Systems Engineering – Bangor University;
 - Aeronautical and Mechanical Engineering – Wrexham Glyndŵr University;
 - Automotive Engineering - Wrexham Glyndŵr University;
 - Design - Wrexham Glyndŵr University; and,
 - Industrial Engineering - Wrexham Glyndŵr University.
- 7.37 Due to the widespread existing provision of Advanced Manufacturing related courses it is therefore recommended that a new Higher Education facility is not needed to meet the skills

requirements of this sector. CCBC should concentrate their efforts in promoting career paths within the sector to younger people and potential people with transferable skillsets from other related sectors such as traditional manufacturing.

Construction

Current Situation

- 7.38 The Construction sector in the North West is diverse and focuses on many skilled trades and professions across a variety of disciplines and specialisms. The traditional construction professions and trades are heavily supported by other functions within the sector such as: administration, project management, procurement, legal, finance, surveying, marketing, education, community engagement and other supply-chain elements. These other professions are also critical elements of the Construction industry in Conwy, North Wales and beyond.
- 7.39 According to Welsh Government data, the Construction sector employed 3,800 people within Conwy County in 2017 which accounted for 15% of North Wales' jobs within the Construction sector. Between 2012 and 2017, the number of construction employees in Conwy increased by 600 jobs (+19%) more than double the North Wales figure (+9%) and almost four times the level of growth experienced across Wales (5%).
- 7.40 The latest 2018 Annual Population Survey [APS] Workplace Analysis indicates that 1,300 people were employed within skilled trades occupations, 600 people were working in elementary occupational roles within the Construction sector in Conwy County⁴⁶.
- 7.41 The Construction Industrial Training Board [CITB] provides construction output growth data. Between 2018 and 2022, the Welsh Construction sector is projected to grow by 4.6% which is significantly higher than the UK level (1.3%). Wales' construction output growth is largely driven by major projects. Since 2016, Conwy specifically has a number of Construction projects that have led to an increase in demand for construction employees within the County. These construction projects include:
- Llandudno General Hospital - Forecast value: £38.2 million;
 - Water Treatment Works (extension) - Forecast value: £19.6 million;
 - Contractors Framework Agreement – Forecast value: £75.0 million;
 - Council Offices – Forecast value: £11.9 million;
 - Railway Station Upgrade – Forecast value: £28.1 million;
 - Retail Unit (Refurbishment) – Forecast value: £4.0 million;
 - Council Office Building & Multi-Storey Car Park – Forecast value: £9.2 million; and,
 - Road (improvements) – Forecast value: £23.2 million.⁴⁷
- 7.42 These construction projects in Conwy are part of a programme of planned projects worth around £22.3 billion across North Wales. All of these projects have either been completed in the past year or expected to be completed by 2025⁴⁸.
- 7.43 Table 7.7 indicates there will be an increased need for higher skill levels in the Construction sector, particularly at managerial level (SoC1), whilst there's likely to be a smaller demand for skilled trades (SoC5) and process, plant and machine operatives (SoC8).

⁴⁶ ONS (2018) Annual Population Survey Workplace Analysis (July 2017-June 2018)

⁴⁷ North Wales Economic Ambition Board (2017): Regional Skills and Employment Plan 2017 Appendix 2

⁴⁸ Ibid

Table 7.7 Changes to percentage of employment levels within the Construction sector in North Wales

	Managers Directors, & Senior Officials (SOC1)	Professional Occupations (SOC2)	Associate Professional and Technical Occupations (SOC3)	Skilled Trades Occupations (SOC5)	Process, Plant & Machine Operatives (SOC8)
2014	5.3%	6.2%	4.4%	62.6%	8.6%
2019	5.8%	6.8%	4.8%	62.2%	8.1%
2024	6.1%	7.1%	5.1%	61.8%	8.2%
Net Change	+25.8%	+24.2%	+23.7%	+7.4%	+3.3%
Replacement Demand	40.2%	36.7%	37.9%	33.9%	32.4%
Total Demand Needed	66.1%	61.0%	61.6%	41.2%	35.7%

Source: Working Futures Projections / North Wales Economic Ambition Board

7.44 Table 7.8 shows an increase in construction employees with qualification levels of 4-6 attainments between 2014 and 2024 by 76.0%. Whilst construction employees with no qualifications are expected to fall by almost 70% over the same period.

7.45 The replacement demand for all qualification levels (8.9%) within the sector is evident meaning that we can still expect job openings across all the qualification levels by 2024 driven by higher qualified workers and leavers.

Table 7.8 Implications for qualifications by levels required within the Construction sector in North Wales

	% share 2014	% share 2024	% change 2014- 2024	Replacement Demand % share
QCF Levels 7-8	3.0%	3.6%	32.8%	3.0%
QCF Levels 4-6	15.3%	24.7%	76.0%	15.3%
QCF Levels 3	32.4%	26.7%	-10.2%	32.4%
QCF Levels 2	26.5%	30.0%	23.3%	26.5%
QCF Levels 1	14.6%	12.6%	-6.0%	14.6%
No Qualification	8.3%	2.4%	-68.8%	8.3%
Total	100.0%	100.0%	8.9%	100.0%

Source: Working Futures Projections / North Wales Economic Ambition Board

Next Steps

7.46 GLM has campuses across North Wales that already provide construction trades courses. However, the college does not provide NVQ level 4+ qualifications for professional Construction roles such as quantity and building surveying - despite providing degree courses for civil engineering and commercial construction management.

7.47 CCBC should focus on retaining and continuing to develop a local skills base and workforce that will be able to exploit the opportunities being created in Conwy and across North Wales.

7.48 As highlighted in Table 7.7, the total demand for higher skilled construction-related occupations (SOC 1 – SOC3) is expected to increase by 61% between 2014 and 2024. Therefore, it is suggested that CCBC work with GLM to expand the number of courses offering a construction-related qualification level 4-6, for example addressing surveying, project and cost management.

7.49 It is also important that CCBC recognises the need to partner with secondary schools and employers to promote and enhance skillsets applicable to career pathways in the Construction sector.

Creative & Digital

7.50 The Creative and Digital sector is an innovation growth employer in Conwy and North Wales and has been identified by CCBC and Welsh Government as a priority sector. This sector is based on creativity, skill and talent and is one of the fastest growing sectors in North Wales and across the UK.

7.51 According to NWEAB's Regional Skills and Employment Plan (2017), this sector consists of a very highly qualified labour market, with 68% of the workforce holding at a least a degree qualification⁴⁹. Furthermore, the NWEAB identified a number of key statistics including:

- 10,800 jobs are supported by the sector across North Wales;
- The average weekly earnings within the sector is £711 across North Wales which is significantly above the regional weekly earnings for all sectors; and,
- 1,160 Creative and Digital enterprises are across the sector in North Wales.

Skills Gap / Surplus

7.52 According to the Welsh Government, 2,700 people are employed across Conwy County within the Creative and Digital industries in 2017 which is 145% increase over a five-year period. Compared with the rest of Wales, Conwy County has experienced a significant increase (+145%) in employment levels within the Creative and Digital sector compared to North Wales (-17.0%) and Wales (+44.0%), respectively. This demonstrates that this priority sector is becoming an increasingly important element to the County's economic growth.

7.53 The growth of the employment within the Creative and Digital sector has been facilitated by the educational institutions within the County and across North Wales. In 2018-19, a quarter of courses offered Grŵp Llandrillo Menai were related to the Creative and Digital sector. According to Creative North Wales, 1,040 students are currently studying Creative and Digital-related first degrees offered by both Bangor and Wrexham universities⁵⁰. In addition, both HE institutions have departments and courses that are directly related to the sector such as:

- Bangor University: The University accommodates the School of Creative Studies and Media which specialises in six key areas including – creative studies, film, journalism, media and new media, theatre and writing including combinations with other subjects; and,
- Wrexham Glyndŵr University: over 50% of courses offered at Wrexham University are related to creative / computing / digital sectors.

7.54 In terms of future requirements, discussions with key stakeholders in this sector noted that advanced skills such as computing and technology, influencing and product development will be important in enhancing Conwy and North Wales' competitive advantage. When focusing on a number of the future skills required for this sector in Conwy and North Wales it was agreed the following areas are important for the County and wider region⁵¹:

- Software development;
- Visual Effects (VFX);

⁴⁹ North Wales Economic Ambition Board: Regional Skill and Employment Plan 2017

⁵⁰ Creative North Wales (2018): 2018 North Wales Creative Audit

⁵¹ North Wales Economic Ambition Board (2017): Regional Skill and Employment Plan 2017

- Graphic Design;
- Development of Apps;
- Web Design and Development; and,
- Digital Archivists.

7.55 Within North Wales, a number of key transformational projects are pivotal in the clustering of Creative and Digital business such as the Menai Science Park, Wrexham Technology Park and St. Asaph Business Park.

7.56 One of the key challenges identified by key stakeholders was around the retention of graduates and professionals within the sector –many of whom have considerable flexibility in terms of workplace locations due to technology.

7.57 Table 7.9 indicates there will an increased need for higher skill levels in the Creative and Digital sector, particularly at managerial level (SoC1). Whilst there’s likely to be smaller demand for skilled trades (SoC5) despite the slight fall in the employment levels between 2014 and 2024 excluding replacement demand.

Table 7.9 Changes to % employment levels within the Creative and Digital Industries Sector in North Wales

	Managers Directors, & Senior Officials (SOC1)	Professional Occupations (SOC2)	Associate Professional and Technical Occupations (SOC3)	Skilled Trades Occupations (SOC5)	Sales and Customer Services (SOC7)
2014	8.6%	22.5%	23.5%	5.8%	5.4%
2019	9.0%	23.5%	24.2%	5.6%	5.2%
2024	9.2%	23.7%	24.3%	5.3%	5.4%
Net Change	+17.8%	+14.7%	+12.9%	-0.1%	9.2%
Replacement Demand	38.6%	35.5%	33.9%	35.4%	24.3%
Total Demand Needed	56.5%	50.1%	46.8%	35.3%	33.5%

Source: Working Futures Projections 2014-2024 / North Wales Economic Ambition Board

7.58 Table 7.10 shows an increase in Creative and Digital employees with qualification levels of 4-6 attainments between 2014 and 2024 by 43.8%. Whilst sector-relate employees with no qualifications are expected to fall by almost 56% over the same period.

7.59 The replacement demand for all qualification levels (3.1%) within the sector is evident meaning that we can still expect job openings across all the qualification levels by 2024 driven by higher qualified workers, innovation, technology and changing economic demands.

Table 7.10 Implications for qualifications by levels required within the creative & digital sector in North Wales

	% share 2014	% share 2024	% change 2014-2024	Replacement Demand % share
QCF Levels 7-8	12.9%	13.9%	17.8%	12.9%
QCF Levels 4-6	34.6%	45.6%	43.8%	34.6%
QCF Levels 3	17.6%	15.3%	-5.2%	17.6%
QCF Levels 2	17.6%	15.6%	-2.9%	17.6%
QCF Levels 1	11.0%	7.0%	-30.5%	11.0%
No Qualification	6.4%	2.6%	-55.9%	6.4%
Total	100.0%	100.0%	3.1%	100.0%

Source: Working Futures Projections / North Wales Economic Ambition Board

Next Steps

- 7.60 Continuous innovation within this sector naturally requires a technologically competent workforce – which is why it is vital that CCBC promotes and retains talent within the County. CCBC needs to work with employers, schools, colleges and Higher Education institutions to ensure that local residents have digital capability and capacity skills which are fundamental to Conwy's thriving Creative and Digital sector.
- 7.61 In terms of educational provision for the sector, GLM, Bangor and Wrexham Glyndwr universities have well established courses that cater for the Creative and Digital sectors. This is evident with more than 50% of degrees offered by both universities being related to Creative and Digital related skillsets. This indicates that there is a demand for these courses in North Wales. The issue is retaining graduates with sector-related degrees from both universities to promote employment opportunities within the County and across North Wales.
- 7.62 CCBC should also concentrate their efforts in building strong partnerships with key employers within the sector. Discussions with M-Sparc suggested that tenants were struggling to recruit certain roles in the sector such as software designers and coding specialists – CCBC need to promote the County as an ideal place to live and work to attract wider talent from further afield.

Health and Social Care

- 7.63 The Health and Social Care sector in Conwy and North Wales comprises of a range of multidisciplinary sub-sectors including health via NHS and staff within the Betsi Cadwaladr University Health Board [BCUHB]; social care via local authorities; and private health services such as dentists, opticians and other health / social outlets.
- 7.64 As this sector is formed of different public and private services which overlap, there is often a limited understanding of current workforce levels and future sectoral labour / skill requirements. However, the NWEAB and Regional Skills Partnership have been working with key stakeholders in the sector to promote more of an understanding into the sector's future requirements.
- 7.65 According to NWEAB's Regional Skills and Employment Plan, the major employers in Conwy within this sector include: BCUHB, Alcontrol Laboratories and Core Assets Children's Services.
- 7.66 According to BRES Data (2017), 7,000 people were employed in the Health and Social Care sector in 2017 which amounted to 16.3% of all employees in Conwy. This was higher than the Welsh (16.1%) and UK (13.3%) levels.

7.67 Table 7.11 indicates there will be an increased need for caring roles in the Health and Social Care sector particularly at caring and other services (SoC6) at 50.2%. The considerable increase in demand for caring roles coincides with the aging population and the growing need for more caring occupations to meet the growing demand amongst care providers.

7.68 In contrast, there's likely to be a sharp fall in the employment levels for administrative and secretarial roles (SoC4) between 2014 and 2024. However, when you take into consideration replacement demand there is expected to be a slight demand for administrative and secretarial roles.

Table 7.11 Changes to % employment levels within the health and social care sector in North Wales

	Managers Directors, & Senior Officials (SOC1)	Professional Occupations (SOC2)	Associate Professional and Technical Occupations (SOC3)	Administrative & Secretarial (SOC4)	Caring and Other Services (SOC6)
2014	3.2%	34.8%	12.9%	1.2%	36.4%
2019	3.1%	36.0%	13.2%	1.0%	37.6%
2024	3.2%	37.2%	13.6%	0.7%	37.9%
Net Change	+1.7%	+10.2%	+9.0%	-37.7%	+7.6%
Replacement Demand	39.8%	39.7%	37.1%	39.1%	42.6%
Total Demand Needed	41.5%	50.0%	46.0%	1.4%	50.2%

Source: Working Futures Projections / North Wales Economic Ambition Board

7.69 Table 7.12 shows an increase in Health and Social Care employees with qualification levels of 4-6 attainments between 2014 and 2024 by 23.1%. Whilst Health and Social Care employees with no qualifications are expected to fall by almost 83.4% over the same period.

7.70 The replacement demand for all qualification levels (3.1%) within the sector is evident meaning that we can still expect job openings across all the qualification levels by 2024 driven by higher qualified workers and need for care workers due to the increased aging population expected across North Wales.

Table 7.12 Implications for qualifications by levels required within the health and social care sector in North Wales

	% share 2014	% share 2024	% change 2014- 2024	Replacement Demand % share
QCF Levels 7-8	12.3%	12.2%	1.9%	12.3%
QCF Levels 4-6	42.4%	50.6%	23.1%	42.4%
QCF Levels 3	19.7%	20.2%	6.0%	19.7%
QCF Levels 2	17.9%	15.1%	-12.9%	17.9%
QCF Levels 1	6.0%	1.6%	-72.1%	6.0%
No Qualification	1.8%	0.3%	-83.4%	1.8%
Total	100.0%	100.0%	3.1%	100.0%

Source: Working Futures Projections / North Wales Economic Ambition Board

Next Steps

- 7.71 As with most districts across the UK, Conwy County will face a future aging population which will add extra pressure to health and social care resources across Conwy County. Whilst this poses a problem for the future labour supply, conversely there will be opportunities for CCBC to use sector ambassadors, to promote career pathways will be key.
- 7.72 In terms of educational provision for the sector, GLM, Bangor and Wrexham Glyndwr universities all have well established courses that cater for Health and Social Care sector. However, growing issues were identified by NWEAB:
- “Yet with an aging population and continued inward migration of retirees, the numbers needing care are increasing. Therefore, the risks of skills gaps and deficiencies of provision across the sector if new entrants into newly created employment opportunities are not created, and also further training and advancement of current staff, could result in longer-term issues for both skills and delivery by the sector across all its component areas.”⁵²
- 7.73 It is clear that Conwy and North Wales suffer from people shortages in this sector and this issue needs to be addressed through CCBC working closely with Betsi Cadwalader University Health Board [BCUHB].
- 7.74 As highlighted through discussions with both universities, one of the main constraints to this sector is related to structured placements and apprenticeships. This was the only sector that key educational providers could potentially provide an opportunity for a new Higher Education facility (ideally a new medical school / centre) within Conwy County. However, a new medical school would need to work in partnership with a nearby hospital and be supported by NHS employers which would prove very difficult.
- 7.75 There is also a high turnover in Conwy and North Wales of individuals (at all skill levels) within the wider sector – including a shortage of GPs, nurses, and professional care workers. CCBC should work with key stakeholders in supporting appropriate skills development to aid retention and recruitment of additional qualified support staff, which has been identified as being a key element of any potential solution to these issues.

Tourism & Hospitality

Current Situation

- 7.76 CCBC’s identification of Tourism and Hospitality as a key strategic priority sector coincides with the Welsh Government’s Strategy for the Tourism Industry (2013) which was recently updated and reviewed in December 2016. The Strategy focusses on the need to develop and promote the key tourism routes of Wales, notably A55 Culture Corridor (including Conwy County).
- 7.77 The tourism sector is an integral part of Conwy’s economy supporting 6,500 direct jobs⁵³, bringing £559m revenue to the County’s economy annually (25% of the All Wales total); and supporting 70,000 hotel / B&B bed spaces (24% of North Wales’ total stock)⁵⁴. CCBC has acknowledged the importance of the sector by stating that:

⁵² North Wales Economic Ambition Board (2017): Regional Skills and Employment Plan 2017

⁵³ Welsh Government (2018): Priority Sector Statistics, 2017 (Sub-Wales)

⁵⁴ <http://www.conwy.gov.uk/en/Council/Strategies-Plans-and-Policies/Destination-Conwy/Destination-Conwy.aspx>

"The benefits are increasingly shared across the County; with visitors spending on accommodation, food and drink, leisure activities and shopping. Non-tourism businesses also benefit through local supply chains, such as the wholesaler who supplies restaurants and the local garage where visitors are supplied with fuel."⁵⁵

- 7.78 According to Visit Britain, the number of UK visits to Conwy had reduced by almost 22% between 2016 and 2017. However, the average expenditure per visit had increased by 12% to £3220 per visit over the same period. In addition, the average length of stay (overnight) had increased by 7% from 2016⁵⁶. There is a strong seasonal tourism industry in Conwy, with the majority of visits to the County occurring between July and September, at 42% of visits (£26.7 m spend) in 2017. April to June was another popular time of the year at 33% (£21.0m). The autumn and winter months were less popular, with 13% of visits (£8.6m) occurring from October to December, and 12% of visits (£7.5m) from January to March⁵⁷.
- 7.79 CCBC's Destination Conwy Management Plan published a destination management vision for Conwy and established a destination management steering group. It provides a strategy to promote key tourist landmarks in Conwy such as: Conwy Castle, Surf Snowdonia and Colwyn Bay Waterfront.

Skills Gap / Surplus

- 7.80 According to NWEAB, heritage tourism is a key contributor to tourism in Conwy and across North Wales. It states that specialist skills are often required to maintain and develop the attractions and infrastructure of this key sub-sector. NWEAB highlights that "over 5,000 hours of training was delivered in North Wales, which equates to approximately 700 working days, in relation to historic environment attractions in 2015-16"⁵⁸.
- 7.81 It was identified that there is a labour shortage in related occupations (such as chefs) rather than skills shortage. This is because too few young people are entering into the profession, combined with low retention rates after training. Table 7.13 shows change in employment levels within the tourism and hospitality sector from 2004 to 2024. It shows a substantial net change in demand for all five occupation levels within the sector. The 'professional occupations' group (SOC3) is expected to see the greatest employment growth (+31.2%) in the tourism and hospitality sector by 2024.
- 7.82 When taking into account replacement demand, all major occupation groups within the region are anticipated to experience total demand levels increase across all key occupation groups within the sector. This means that there may be substantial job openings / vacancies for all relevant occupation types within the sector across North Wales.

⁵⁵ Ibid

⁵⁶ <https://www.visitbritain.org/nation-region-county-data>

⁵⁷ Ibid

⁵⁸ North Wales Economic Ambition Board (2017): Regional Skills and Employment Plan 2017

Table 7.13 Changes to % employment levels within the tourism and hospitality sector in North Wales

	Managers Directors, & Senior Officials (SOC1)	Professional Occupations (SOC2)	Associate Professional and Technical Occupations (SOC3)	Sales and Customer Service Occupations (SOC7)	Leisure and other services (SOC6)
2014	12.8%	2.0%	2.5%	6.1%	4.0%
2019	13.7%	2.2%	2.8%	5.9%	4.4%
2024	14.1%	2.2%	2.9%	6.0%	4.5%
Net Change	+22.4%	+25.9%	+31.2%	+10.2%	+25.6%
Replacement Demand	50.0%	44.0%	42.1%	39.0%	49.3%
Total Demand Needed	72.5%	69.9%	73.3%	49.2%	74.9%

Source: Working Futures / North Wales Economic Ambition Board

7.83 Table 7.14 shows there is expected to be a significant shift in qualification attainment requirements (particularly levels 4-8). Employment levels are forecast to significantly reduce for the lower skilled occupations (qualification levels 1 and 2).

7.84 The net changes in employment levels for all occupation groups relating to the tourism and hospitality sector have been exacerbated by the replacement demand (current labour employed within the sector that will potentially start to retire and leave). By 2024, there is likely to be replacement job openings across all qualification levels across Tourism and Hospitality sector.

Table 7.14 Implications for qualifications by levels required within the tourism and hospitality sector in North Wales

	% share 2014	% share 2024	% change 2014- 2024	Replacement Demand % share
QCF Levels 7-8	3.4%	4.3%	38.3%	3.4%
QCF Levels 4-6	19.2%	35.9%	108.3%	19.2%
QCF Levels 3	22.4%	20.1%	-0.1%	22.4%
QCF Levels 2	27.5%	25.6%	3.7%	27.5%
QCF Levels 1	17.5%	11.4%	-27.9%	17.5%
No Qualification	10.0%	2.7%	-69.7%	10.0%
Total	100.0%	100.0%	11.2%	100.0%

Source: Working Futures / North Wales Economic Ambition Board

Next Steps

7.85 Conwy has a very strong Tourism and Hospitality sector. However, CCBC must continue to work with local businesses to promote this sector throughout the year, as seasonal employment still remains the backbone of the sector. CCBC needs to ensure that future Destination Management Action Plans [DMP] provide a coherent vision for the County's tourism industry all-year round. Destination Conwy is CCBC's DMP and is in line with the agreed principles laid down in the Visit Wales' Developing the Visitor Economy: A Charter for Wales 2009. CCBC's future DMPs should take into consideration skills and employment opportunities which could be sought by non-tourism businesses through local supply chains, such as the wholesalers who supply restaurants and other sector-related businesses.

- 7.86 In terms of skill sets within the industry, it has been highlighted that there is a lack of chefs within Conwy and North Wales generally. Many key local employers are regularly hiring agency chefs at a considerably higher cost to meet and fulfil vacancies and there is a lack of higher-qualified chefs within the wider region. This is a problem that needs to be addressed.
- 7.87 In terms of this sector, the problems are based more on staffing shortages within the sector rather than a lack of courses across North Wales. It is unlikely that an additional Higher Education facility in Conwy would solve the current staffing problems facing the Tourism sector. More information about career pathways may be a proactive approach in tackling the workforce shortage issue.

Food & Drink

Current Situation

- 7.88 Conwy County already has a well-established Food Manufacturing sector. There is clear potential to grow this sector by investing in technology and premises, particularly in relation to food processing. The Food and Drink sector within Conwy is identified as a key priority sector within the CCBC's draft Economic Strategy.
- 7.89 The Food and Drinks sector relies on a combination of different career pathways within agriculture, sales, marketing, production, logistics, and product development. Tasty Careers Wales (an organisation supported by Welsh Government) has highlighted a number of key roles within the sector which include: food scientists and technologists, production managers, chefs, product development, butcher, baker, nutritionist, supply chain manager and researchers amongst others⁵⁹.
- 7.90 It is important to note that the Food and Drinks sector overlaps with a number of other priority sectors such as Tourism and Hospitality and Manufacturing, and there are clear transferable skills.
- 7.91 In terms of education support for this sector, Grŵp Llandrillo Menai has 44 courses related to 'food and drink' at various qualification levels ranging from foundation level, apprenticeships, degrees and short accredited specialist courses. The Food Technology Centre [FTC], which is part of Grŵp Llandrillo Menai has played a key role in supporting primary producers and processors in adding value to Wales' food economy. FTC provides Conwy and North Wales' food businesses with food technology advice, guidance and mentoring to embrace research and development, encouraging them to be innovative in creating new high-quality Welsh food and drink products.

Skills Gap / Surplus

- 7.92 According to the Welsh Government, 2,200 people are employed in Conwy within the Food and Drinks sector in 2017 which has doubled over a five-year period, which outstrips the level of growth across North Wales (-17.0%) and Wales (18.0%), respectively. This priority sector is becoming increasingly important to the County's economic growth.
- 7.93 NWEAB highlighted that North Wales' food and drink sector suffered from people shortages rather than skill shortages. It is understood that career pathways within the sector are not properly being promoted as well as they could be due to a lack of communication and understanding of the wider sector's opportunities. Table 7.15 shows that the higher skilled occupation (SOC1 – SOC 3) groups are expected to see the greatest employment growth in the Food and Drink sector. By 2024, professional occupations (SOC2) are anticipated to have the

⁵⁹ North Wales Economic Ambition Board (2017): Regional Skills and Employment Plan 2017

largest net change (+24.4%) in jobs over the 10-year period. Whilst there are expected to be decreases in the employment levels for both skilled trades (SOC5) and process, plant and machine operatives (SOC8).

- 7.94 The total demand for all relevant occupation types in the sector is likely to significantly increase by at least 28% over the ten-year period. With the strongest demand likely to be for professional occupations (at 66.8%) demonstrating that there are likely to be employment shortages facing the sector across North Wales by 2024.

Table 7.15 Changes to % employment levels within the food and drink sector in North Wales

	Managers Directors, & Senior Officials (SOC1)	Professional Occupations (SOC2)	Associate Professional and Technical Occupations (SOC3)	Skilled Trades Occupations (SOC5)	Process, Plant and Machine Operatives (SOC8)
2014	6.1%	3.1%	5.9%	9.45	55.3%
2019	6.9%	3.7%	6.3%	9.6%	52.4%
2024	7.2%	3.8%	6.4%	8.8%	52.0%
Net Change	+20.6%	+24.4%	+8.8%	-5.3%	-5.2%
Replacement Demand	42.6%	42.4%	37.9%	35.0%	33.3%
Total Demand Needed	63.2%	66.8%	46.8%	29.7%	28.1%

Source: Working Futures Projections / North Wales Economic Ambition Board

- 7.95 According to the Working Futures projections, the majority of employees in this sector are educated to GCSE level as shown in Table 7.16. Substantial opportunities for growth can be seen from 2014 to 2024 in QCF Levels 4-6, mostly due to a relatively steep increase in QCF Level 6 attainments.

- 7.96 However, there is expected to be a sharp decline in the number of workers within the sector with no qualifications. The likely factor causing this trend could be a combination of closer links between educational institutions, food producers and processors across North Wales accompanied with an increase in sector-related (food and drink) learning courses.

Table 7.16 Implications for qualifications by levels required within the food and drink sector in North Wales

	% share 2014	% share 2024	% change 2014-2024	Replacement Demand % share
QCF Levels 7-8	3.7%	4.4%	18.7%	3.7%
QCF Levels 4-6	16.2%	28.0%	73.6%	16.2%
QCF Levels 3	18.1%	17.8%	-0.6%	18.1%
QCF Levels 2	25.3%	27.7%	10.3%	25.3%
QCF Levels 1	22.3%	17.7%	-19.8%	22.3%
No Qualification	14.4%	4.5%	-68.6%	14.4%
Total	100.0%	100.0%	0.9%	100.0%

Source: Working Futures Projections / North Wales Economic Ambition Board

Next Steps

- 7.97 The Food and Drinks sector overlaps with other key growth sectors such as Manufacturing and Tourism within Conwy and the wider region. The focus of activities of the County's Food and Drinks sector are centred around food processing, production and sales.
- 7.98 In terms of Further and Higher Educational provision related to this sector, there are already a number of courses provided by Grŵp Llandrillo Menai, Coleg Cambria, Bangor and Wrexham Glyndŵr universities. With the opening of the Food Technology Centre in Llangefnï there already exists a specialised centre for the Food and Drinks sector within North Wales. In addition, there are further proposals for a food centre in Wrexham and Gwynedd.
- 7.99 In terms of the Higher Education proposal, it is suggested that CCBC should focus on providing support within food technology and building closer links between producers and processors within Conwy and beyond for the sector. This would involve building stronger linkages with STEM subjects in creating job roles such as food technicians, engineers and technologists as suggested by NWEAB. In addition, increasing links with other sectors and the transferable skills taken from General / Advanced Manufacturing and Tourism and Hospitality would be important to overcome labour shortages⁶⁰.

⁶⁰ North Wales Economic Ambition Board (2017): Regional Skills and Employment Plan 2017

8.0 Conclusions and Recommendations

8.1 This section outlines the conclusions and recommendations for CCBC's proposals to establish a Higher Education facility in the County to help stimulate economic growth by attracting new residents to the area, creating demand for an evening economy and supporting local businesses to grow and innovate.

Context

8.2 Following the work undertaken by Lichfields to determine the employment land requirement for Conwy, it is clear that North Wales' economy is likely to be significantly boosted across key growth sectors and by programmed development projects in the next few years. The key sectors and development projects were identified as likely to generate significant demand for skills, although there is incomplete evidence on the particular nature of these skills requirements. There is currently little robust evidence on the extent to which Conwy and North Wales has the capacity to respond to this demand.

8.3 CCBC therefore commissioned Lichfields to develop an evidence base to clarify the skills needs arising from these growth sectors and projects and to assess the fit with local skills provision in Conwy. This will help CCBC to capitalise on future economic growth opportunities and to help justify the facilitation of a new, dedicated, Higher Education presence in the County.

8.4 This Skill Needs Assessment report has assessed the skill needs arising from the key growth sectors and development projects programmed for North Wales over the coming years, with a particular emphasis on how this aligns with the Higher Education courses currently available in the sub-region and whether new courses and HE facilities could be justified in Conwy.

8.5 This involved reviewing a number of existing documents (including sector specific skills assessments, the Welsh Government's Skills Implementation Plan and the North Wales Regional Skills & Employment Plan), consultations with key project developers and a survey of local businesses' skills needs.

8.6 This was complemented by a comprehensive assessment of local skills provision, including consultation with local education providers such as Coleg Llandrillo, analysis of current skills and training courses offered in Conwy, and analysis of education statistics held by Higher Education Funding Council Wales, Statistics Wales and other agencies. A demographic assessment was also undertaken to highlight how the population aged between 16-24 is expected to shift in the future, along with an analysis of existing education facilities in Conwy.

Demographic and Skills

8.7 According to economic indicators, Conwy County has a relatively well-qualified workforce in comparison to the North Wales and Welsh rates with particular strengths in tourism, hospitality and food services. This is to be expected as tourism remains one of the mainstays of Conwy's economy and is a major source of employment and revenue.

8.8 Resident-based wages in the County are higher than the North Wales average rate, but Conwy has a lower level of economic activity compared to the other North Wales counties. Conwy County does have a proportionally higher number of residents with higher level qualifications compared to the North Wales and Welsh averages, although it should be noted that the rates are still below what is achieved nationally.

8.9 Turning to the sector distribution of employment in Conwy, the County employs a higher proportion of people in the following sectors compared to North Wales, Welsh and national levels: Health; Accommodation & Food Services and Arts, Entertainment, Recreation & other

services sectors. However, Conwy County is underrepresented in the Manufacturing, Information & Communication and Professional, Scientific & Technical sectors compared to comparator areas.

- 8.10 Conwy County is a net exporter of labour, with the net outflow of workers remaining stable at 4,851 persons. The most significant commuting relationships for the County are with Denbighshire, Gwynedd, Flintshire, Wrexham, Chester & Cheshire West.

Key Transformational Projects

- 8.11 CCBC required Lichfields to take into account a number of high profile and major private sector led developments across North Wales which will influence future economic growth and likely have spin-off benefits for Conwy. All of the transformational projects related to the Advanced Manufacturing and Materials, Energy and Environment and Creative and Digital sectors.
- 8.12 The majority of the developers and stakeholders involved in the key transformational developments suggested that the skilled construction trades are easier to recruit within North Wales in comparison to the white-collar construction roles (such as project managers, site managers and quantity surveyors).
- 8.13 All key developers interviewed suggested that there would be a need for STEM related roles such as engineers (mechanical / electrical), surveyors, and project managers. Problems facing these sectors are related to the increasing number of people with these skills leaving the sector due to retirement.

Skills Needs Survey

- 8.14 Lichfields' conducted a Skills Needs Survey of local businesses to understand their current and future skills requirements. The Skills Needs Survey received responses from 22 businesses of various sizes and individual sectors. All of the respondents were small companies employing fewer than 50 people. The majority employed fewer than 10 members of staff.
- 8.15 Survey findings centred around many respondents stating that the general perception was that North Wales' workforce lack specialist / technical skills to meet their businesses' needs. In terms of training opportunities, the majority of respondents (90%) stated that they provide in-house training for their employees. However, fewer employees paid for external companies to provide training sessions to their employees.
- 8.16 The majority of respondents felt that businesses in North Wales may have to look elsewhere for workforce skills as there may not be a sufficient local supply and/or that future workforce may be ill-equipped to meet their business's future needs.

Further and Higher Education Institutions in North Wales

- 8.17 As part of the Skills Needs Assessment, Lichfields and The Mackinnon Partnership engaged with key Further and Higher Education providers across North Wales. This included: Coleg Llandrillo (as part of Grŵp Llandrillo Menai), Bangor University and Wrexham Glyndŵr University.
- 8.18 Conwy's Further Education provision is in the hands of Coleg Llandrillo, which is part of Grŵp Llandrillo Menai [GLM]. Coleg Llandrillo's £4.5m University Centre in Rhos-on-Sea (based within Conwy County) opened in September 2014, as a joint venture between the college and Bangor University. Coleg Llandrillo provides learning courses that covers all seven key growth sectors. However, Coleg Llandrillo has almost 50% of its courses covering the Creative & Digital and Construction sectors. Both universities (Bangor University and Wrexham Glyndŵr) provide courses that cover the majority of skillsets required for the CCBC's identified key growth sectors

(expect for Tourism & Hospitality and Food and Drink sectors). Bangor University has a strong connection with key stakeholders that are involved in key developments such as M-SParc's new Science Park.

- 8.19 All three education providers suggested that CCBC should maximise their existing partnerships with their educational facilities rather than opening a new Higher Education institution in Conwy County. Therefore, by engaging with each other more closely, both the educational providers and CCBC could further understand skill shortages and how they can use existing facilities and resources to meet current and future skills gaps.

Alignment of Skills Demand and Supply

- 8.20 Lichfields set out to provide recommendations on where there are particular skills gaps and shortages that could be addressed in Conwy County and the wider region. This was primarily focused on the seven key growth sectors, summarised below:

Energy & Environment

- 8.21 The Energy and Environment sector has been identified as a key growth sector by CCBC. Economic growth within this sector primarily focussed on skills relating to energy generation, low carbon technologies and processing.
- 8.22 The majority of the key developments are linked to this sector including: Colwyn Bay Tidal Lagoon; Orthios Eco Park and Energy Centre; Parc Adfer and Wrexham Energy Centre. Many of the key developers have already built up strong relationships with educational institutions to fill current and future vacancies. Future workforce demand will require a higher-skilled workforce compared to the current situation to meet the future requirements of this sector.
- 8.23 There is a concern that another new Higher Education facility in Conwy County could risk 'doubling up' on relevant courses within the Environment and Energy sector. Therefore, it is suggested that CCBC work with the North Wales Economic Ambition Board, educational providers, neighbouring local authorities and private companies to promote career pathways in this sector.

Advanced Manufacturing and Materials

- 8.24 NWEAB identified over 153 businesses within the Advanced Manufacturing and Materials sector across North Wales. Sector-related stakeholders suggested that there remained critical skill shortages for STEM-related occupations such as engineers, scientists and technological roles.
- 8.25 Future sector-related employment forecasts show increases in demand due to the replacement of current employees within the sector that are expected to retire and leave. Key stakeholders within the Manufacturing sector stated that challenges existed in promoting and raising awareness of future job and employment opportunities amongst young people.
- 8.26 CCBC should concentrate their efforts in promoting career paths within the sector to younger people and potential people with transferable skillsets from other related sectors such as traditional manufacturing.

Construction

- 8.27 The Construction sector in the North West is diverse and focuses on many skilled trades and professions across a variety of disciplines and specialisms. It is expected that in the future there will be a growing demand for white-collar construction roles such as project managers and site managers.

- 8.28 Therefore, it is suggested that CCBC work with GLM to expand the number of courses offering a construction-related qualification level 4-6, for example addressing surveying, project and cost management. This could result in CCBC working with Grŵp Llandrillo Menai in expanding courses within their existing facilities that address the workforce and skills shortages in white collar Construction roles (such as site surveying / project and construction management).

Creative and Digital

- 8.29 The Creative and Digital sector is an innovation growth employer in Conwy and North Wales and has been identified by CCBC and Welsh Government as a priority sector. This sector generally has a highly qualified and 'footloose' workforce.
- 8.30 Conwy County has experienced a significant increase in employment levels within the Creative and Digital sector compared to North Wales and Wales. This demonstrates the potential to further build on an existing strong workforce base in the sector.
- 8.31 CCBC should promote the alternative lifestyle that can be offered by County as an attractive place to live - to attract a high qualified workforce that are mobile.

Health and Social Care

- 8.32 The Health and Social Care sector in Conwy and North Wales comprises of a range of multidisciplinary sub-sectors including health via NHS and staff within the Betsi Cadwaladr University Health Board [BCUHB]; social care via local authorities; and private health services such as dentists, opticians and other health / social outlets.
- 8.33 There is also a high turnover across Conwy and North Wales of individuals (at all skill levels) within the wider sector – including a shortage of GPs, nurses, and professional care workers.
- 8.34 It is considered that as opposed to a new Higher Education facility for this key growth sector, CCBC should work with key stakeholders in supporting appropriate skills development to aid retention and recruitment of additional qualified support staff.

Tourism and Hospitality

- 8.35 Conwy has a very strong Tourism and Hospitality sector. However, CCBC must continue to work with local businesses to promote this sector throughout the year, as seasonal employment still remains the backbone of the sector.
- 8.36 Problems are focused more towards staffing shortages within the sector rather than a lack of courses across North Wales. It is unlikely that an additional Higher Education facility in Conwy would solve the current staffing problems facing the Tourism sector. More information about career pathways may an appropriate proactive approach in tackling the workforce shortage issue.

Food and Drink

- 8.37 Conwy County already has a well-established Food Manufacturing sector. There is clear potential to grow this sector by investing in technology and premises, particularly in relation to food processing.
- 8.38 In terms of the Higher Education proposal, it is suggested that CCBC should focus on providing support within food technology and building closer links between producers and processors within Conwy and beyond for the sector. This is due to the Food Technology Centre providing a specialised educational focus for this sector and other centres proposed across North Wales.

Recommendations

- 8.39 From discussions with key stakeholders and educational institutions, there is currently no evidence to support a conclusion that Conwy Council should look to set aside land for a new Higher Education facility.
- 8.40 We recommend that Conwy Council should invite key developers, Bangor and Wrexham Glyndŵr universities, and Grŵp Llandrillo Menai to annual planning discussions around FE and HE opportunities for Conwy:
- the purpose would be to build a relationship in a cost-effective manner, recognising that the labour market - the balance of supply and demand - is constantly changing, so there is real value in keeping in touch on a regular basis. A well-managed annual meeting will lead to better contacts which can be used effectively during the rest of the year.
 - an annual meeting would also help to ensure that all three institutions give some focused attention to how what they do benefits Conwy.
 - the agenda would cover both opportunities for business (both existing local companies and prospective inward investors), and opportunities for local people: enhancing opportunities for both groups to benefit more from working with the universities and the college. (The agenda should be broad, and range wider than land use matters: it could, perhaps, be titled "the Conwy HE Partnership").
 - all four parties (it should be a single meeting) would share their plans – and their hopes and fears. Over time that should develop into open sharing, which would in time lead to better knowledge, deeper understanding and therefore better decisions for Conwy, by all parties.
 - meetings could be hosted by each of the partners in turn, although it may be better to meet at the HE centre in Rhos-on-Sea, asking each year "are we (collectively) making the most of this opportunity?".
 - the cost would be minimal: officer time in preparing papers and following through with the actions identified.