

Miller
RESEARCH

**Construction Skills in
Mid Wales**

Final Report
to

**National Council for
Education
and
Training for Wales**

March 2004

Report From



Miller Research (UK) Ltd
Pen-y-Wyrlod, Llanvetherine.
Abergavenny. Monmouthshire. NP7 8RG
Tel: (01873) 821765 Fax: (01873) 821704

info@miller-research.co.uk

www.miller-research.co.uk

| | |
|--|-----------|
| Executive Summary | 5 |
| Introduction | 5 |
| Background to construction in Mid Wales | 5 |
| Stakeholder Views | 6 |
| Employer Survey | 7 |
| Provider Interviews..... | 8 |
| Provider Workshop | 9 |
| Current Learning Provision in Construction Serving Mid Wales | 9 |
| Summary of Recommendations..... | 11 |
| 1 Background to the Construction Sector in Mid Wales | 13 |
| Economic Profile | 13 |
| Employment Profile..... | 15 |
| The Future | 16 |
| “Rethinking Construction” - the Egan Report (1998) | 20 |
| The Green Building Sector..... | 21 |
| Skills and Learning | 21 |
| 2 Stakeholder Interviews | 24 |
| Introduction | 24 |
| Barriers to Learning | 25 |
| 3 Employer Survey | 31 |
| Introduction | 31 |
| Survey Results – Business Background | 31 |
| Business Optimism | 34 |
| Employment | 35 |
| Recruitment, Skills and Training..... | 42 |
| Awareness of industry qualifications / initiatives..... | 50 |
| 4 Provider Interviews | 54 |
| Introduction and Profile | 54 |
| Interview Results | 54 |
| Planning | 55 |
| Staffing | 55 |
| Employer links | 56 |
| Providers on Employers | 56 |
| Providers on Learners..... | 57 |
| The Future | 58 |
| 5 Provider Workshop – Highlights | 60 |

| | |
|--|-----------|
| Introduction | 60 |
| Course design and provision..... | 60 |
| Relationships with Employers..... | 61 |
| Learning Demand..... | 62 |
| 6 Current Learning Provision in Construction Serving Mid Wales | 64 |
| Current Provision of Training and Support..... | 64 |
| Work-Based Learning Review..... | 65 |
| Further Education and Work-Based Learning Provision in Built Environment ... | 65 |
| Duplication and Gaps in Construction Provision in Mid Wales | 72 |
| Higher Education Supply and Demand for Construction Related Provision | 72 |
| 7 The Sub-Regional Picture | 78 |
| Introduction | 78 |
| Recruitment and Skills..... | 78 |
| Involvement in Training..... | 80 |
| Markets | 81 |
| The Position in South Ceredigion | 82 |
| 8 Conclusions | 84 |
| Conclusions | 84 |
| Comment..... | 86 |
| 9 Recommendations | 91 |
| Summary of Recommendations..... | 95 |
| Appendix 1 Further Education Courses in Construction Related Subjects, Mid Wales and Borders, 2003/4..... | 97 |
| Appendix 2 Qualifications in Construction..... | 101 |
| Appendix 4 Estyn Inspection Grades for Mid Wales FE Providers in Construction | 108 |
| Appendix 5 Employer Survey Questionnaire | 109 |

Executive Summary

Introduction

- Miller Research (UK) Ltd was commissioned by ELWa to investigate the skills needs of the construction sector in Mid Wales, after Ceredigion CCET identified construction as a potential growth area, especially in the context of the South Ceredigion Regeneration Plan.
- The research includes the views of some 20 stakeholders and 12 providers, supplemented by a telephone survey of 100 employers from the Mid Wales construction sector.
- Available data from ELWa was analysed to establish the basic profile of current provision in Mid Wales. Due to limitations with this information, additional data on provision was obtained from providers' own sources.
- Emerging conclusions were tested with a group of providers in a workshop setting, prior to final analysis and reporting.

Background to construction in Mid Wales

- Construction is a regional employment strength in Mid Wales, accounting for 8.7% of all employment, compared with a Wales average of 7.7%.
- Powys and Ceredigion experienced £77m of new orders during 2002, of which £32m was for housing. Public investment was boosted by regeneration works in South Ceredigion.
- The sector in Mid Wales is characterised by a high proportion of small and micro businesses, relying on multi-skilled staff and informal networks to complete projects. Many larger contracts are let to organisations from outside the region, which may then sub-contract a proportion of the work at a local level. Employment is heavily biased towards males and full-time working.
- There are local strengths in building restoration and repair and the potential for expanding green building skills in Mid Wales has been identified.
- Industry forecasts predict an overall staff requirement of 180 new entrants per year up to 2007, of which almost half are required to cover retirements. The most significant demands are expected to be for wood trades, bricklayers, electricians, managers, painters, professionals and plumbers. At a Wales level, there are expected to be shortages of qualified entrants into wood trades, bricklaying and painting.

Stakeholder Views

- 20 stakeholders from agencies and support bodies across the sector and region were interviewed about their perceptions of issues affecting construction and especially skills issues.
- Legislation and voluntary standards in construction are currently driving training, especially with regard to site safety qualifications.
- Increasing technical standards have led to a basic requirement for new entrants into employment to be qualified to Level 2, or preferably Level 3. However, many trainees begin training at Level 1 or below and do not reach the higher level requirements of the industry. This reflects the calibre of young people being encouraged or choosing to enter the industry.
- On-site assessment and training (OSAT) is increasingly used, especially where funding is available from Construction Skills. Employers generally are perceived to be increasingly proactive in training their workforce.
- Major barriers to training are reported to be:
 - Travelling distance, time and costs
 - Lack of availability of some courses (such as gas related, plastering and plumbing) in Mid Wales
 - The current funding framework, which is perceived to work against provision of "bite-sized" courses.
 - The nature of the industry in the region, with a predominance of small and micro businesses and self-employed sole traders.
 - A lack of suitable work experience placements for school and work based learning students
- Despite efforts to publicise improvements in pay and conditions in construction, the industry retains a relatively poor image as a career choice for young people, especially amongst parents and other influencers such as teachers and careers advisors. Despite this, applications for certain courses, such as plumbing, have been increasing.
- Stakeholders were generally optimistic about medium-term performance in construction in Mid Wales, subject to skills shortages arising as existing staff retire. Some key drivers of performance are identified as:
 - The sale of social housing to housing associations
 - Investment in South Ceredigion area renewal
 - Public initiatives requiring contractors to employ qualified personnel.
 - Major infrastructure work - including a road-building project from Llandrindod to Builth
 - National Assembly drivers to improve social housing stock.
- Key improvements in delivering construction skills were seen as:
 - Required partnership working, especially in the context of the 14-19 curriculum
 - Reduction in travel to learn, possibly through more OSAT, use of mobile centres and e-learning.

Employer Survey

- Beaufort Research Ltd carried out the telephone survey of 101 employers between 6th and 10th November 2003. Interviews achieved represented 13% of all businesses employing 10 or fewer staff and 20% of all those with 11 or more employees across the region.
- Most businesses focused on private sector repair and maintenance and house building, within a localised market.
- Two-thirds are sole traders, with the remainder mainly partnerships. The majority are optimistic about industry performance over the next 12 months.
- Most businesses are small – the average size was 3.8 employees. The main groups employed were skilled general builders (emphasising the need for multi-skilling in the region), clerical staff and electricians. Where employers had taken on trainees, they were most likely to be clerical staff or skilled general builders.
- The occupations perceived to have increased most over recent years were clerical staff, a range of non-specified “other” occupations and electricians. However, the majority had not experienced any change in employment profile.
- More than half of all employers had employed some sub-contract or self-employed staff during the previous 12 months. Most common trades sub-contracted were plumbers, electricians, plasterers and bricklayers. A balance of respondents expected to increase their use of sub-contract labour next year, although 57% expected no change.
- 28% of employers had recruited new staff over the last year and 17% had current vacancies. Word of mouth was the most common means of recruiting, followed by JobCentre Plus.
- 22% of all those interviewed had experienced hard to fill vacancies during the previous 12 months, mainly for skilled general builders and “other specialist operatives”. A lack of skills or qualifications amongst applicants was the main reason for not recruiting and the main skills involved were said to be technical and practical.
- 22% also acknowledged a skills gap in their existing workforce, mainly affecting electricians and skilled general builders. The main skills lacking were again technical and practical.
- Levels of training in the sector were very low: Only 20% of respondents had a training plan and almost two-thirds did not train any staff last year. However, more than half of those interviewed saw no barriers to training or thought existing training was adequate. Amongst those who perceived barriers to training, the main issues were allowing staff time off for training (17%) and the perceived cost of training (16%).

- Amongst those who did train, there was a fairly even split between use of on and off the job training. Unsurprisingly, off the job training was mainly supplied by external providers, although almost 80% of on-the job training was supported by in-house staff. Short courses were the most popular with employers, followed by part-time learning.

Provider Interviews

- Twelve training providers across Mid Wales and neighbouring areas were interviewed, to gain their perspectives on training issues in construction.
- The majority of provision in Mid Wales is delivered by FE Colleges – other providers are mainly managing agents and sub-contract back to colleges.
- There are significant difficulties in providing viable courses for the relatively small numbers of trainees in Mid Wales, particularly in relation to more specialist areas of the industry such as tower crane work.
- This contributes to a relatively limited range of courses being available in areas such as plastering, gas courses, building maintenance and plumbing.
- Within the Mid Wales region, informal agreements between providers have led to providers delivering only to students from within their local area, however some students access courses outside the Mid Wales region for specific subject areas, travelling to Pembrokeshire College, SCAT (Shrewsbury), Coleg Menai and others.
- Planning amongst providers is currently based primarily on the last three years' experience or trends, supplemented by institutional plans and employer feedback. There is little evidence of a regional approach to planning at present and limited evidence of planning at a UA level through CCETs. A need for regional planning may be best served by a regional or sectoral level approach, reporting to CCETs and making recommendations to other key planning bodies, such as 14-19 Networks
- New provision is currently under development, in response to rising demand in plumbing, building maintenance, restoration and roofing.
- Relationships with employers can be difficult as a result of the small average business size and lack of critical mass within small firms for hosting work experience or for releasing staff for training.
- In addition, smaller firms outside the scope of Construction Skills may be reluctant to access advice or guidance, for fear of being drawn into paying the industry levy.
- Plumbing and electrical firms are perceived to take a more "professional" line on training, in part driven by the impact of legislation in their sub-sectors.
- The need for some students to take key skills elements as part of their NVO framework is proving a barrier, as students do not wish to take these or are not completing them.

- Providers feel that the image of a career in construction has improved in recent years, with young people recognising the value of relatively well paid employment available in their local area. However, course completion rates are relatively low – possibly due to the requisite of key skills elements for certain students. Older workers are felt to be reluctant to undertake any learning, or to achieve accreditation for existing skills, perhaps because they are able to secure sufficient work at present without doing so. There may also be some basic skills issues amongst the workforce, which would contribute to their reluctance to participate.
- Providers agree that the implementation of the credit framework for learning would have a number of benefits in terms of recruitment and retention of learners.

Provider Workshop

- The provider workshop session offered an opportunity to discuss issues around course provision and the potential for collaboration
- There is considerable reticence amongst providers to deliver new courses or those specialising in specialist aspects of construction, because of the risk of non-viability.
- It is recognised that a partnership approach could help to spread the investment risk.
- Providers were not sure whether sufficient high quality tutors could be recruited to deliver extended provision – it was suggested that a network of shared staff could be developed.
- The current NVQ framework was criticised for neglecting the management, entrepreneurial and multi-skilling content necessary to maintain the industry in Mid Wales.
- Discussion was held around the difficulties of securing quality work experience placements amongst small employers. It was suggested that a network of committed employers could adopt a shared approach to offering placements.
- These networks could be further developed to become training groups – jointly buying in customised training to meet the needs of members.
- Finally, it was recognised that legislation is likely to remain the key driver for training and that providers have an opportunity to plan around the legislative requirements.

Current Learning Provision in Construction Serving Mid Wales

- There are currently 20 FE colleges offering construction related courses in Wales and in 2000-2001 an estimated 3,000 students enrolled on formal construction training courses in Wales.
- Onsite assessment and training has grown significantly since 2000 and is expected to become the main strand in delivering qualifications to the workforce.

- Private training providers include specialists such as Ty-Mawr Lime based at Llangorse near Brecon and y Faenol, between Bangor and Caernarfon – providing guidance and training on a number of traditional and ecological building techniques.
- In addition, there has been a growth in the number of students choosing vocational construction courses and work experience at school level in the region.
- New arrangements for contracting work-based learning are currently being put in place. The process requires potential providers to register interest in delivering five core programmes. Prospective suppliers will be compared on a like-for-like basis within set criteria and successful organisations will then be invited to tender for the supply of learning in their areas of expertise.
- Data from ELWa shows, that in 2000/2001, there were 24 providers delivering to 580 learners resident in Mid Wales. The majority of provision was at levels 2 and 3 and Coleg Powys was the largest provider by a substantial margin.
- Most full-time and work-based learners fall in the 16-19 age group, whilst part-time learners were more likely to be older, especially in the 25-39 age group.
- Data from providers shows a wide range of qualifications available in Mid Wales, with only limited duplication in any local authority area. There are, however, significant gaps in provision in plastering, painting and decorating
- At higher education level, there were 167 applications for construction-related courses from Welsh domiciled students in 2002 – of which the largest demand was for architecture courses. None of this provision was in Mid Wales.

Summary of Recommendations

| No. | Action | Timescale | Responsibility |
|------------|--|------------------|--|
| 1 | Establish an effective sectoral learning network in Mid Wales supported by Construction Skills, to collaborate on provision. | Urgent | ELWa, Providers, CCETs, Construction Skills |
| 2 | Identify key competences and allocate lead providers for key specialisms | Short | ELWa, Providers, CCETs |
| 3 | Investigate formation of employer-focused training groups led by colleges or Local Authorities, as part of recommendation 1. This should be piloted on South Ceredigion and lead by Coleg Ceredigion. | Short | Providers, Construction Skills, |
| 4 | Conduct feasibility study for mobile training provision for the delivery of OSAT and bite-sized courses in Mid Wales, through recommendation 1. | Short | Providers, ELWa, Construction Skills |
| 5 | Support the development of increased OSAT in the region | Medium | Providers, ELWa |
| 6 | Commission provision in areas not currently provided for – especially multi-skilled general building, plastering, stonemasonry, plumbing and painting and decorating | Medium | Provider Network |
| 7 | Improve provision of effective work experience to school pupils and increasing the availability of work placements for WBL students through (1) investment in illustrating potential benefits to employers and (2) providing administrative support and advice to employers considering the provision of work experience | Medium | Careers, Employers, Construction Skills |
| 8 | Increase demand for learning by informing employers of impending legislation and industry requirements | Medium | Providers, Construction Skills and Employer Groups |
| 9 | Respond to the potential for Green Building sector, and consider the opportunities identified in A Winning Mid Wales, when it is released | Medium | All Partners |
| 10 | Work with Construction Skills to identify and develop training and development activities relevant to and targeted at the requirements of a region characterised by micro businesses with a current record of low engagement with learning. | Medium | ELWa, Providers, Construction Skills |
| 11 | Develop additional workplace support for first-time employees who have not yet been able to reach level 2 | Medium | ELWa, Providers |
| 12 | Action to address negative perceptions of the industry and to increase its attractiveness to academically more able students. <ul style="list-style-type: none"> • Increase the quality of regionally | Longer | ELWa, Construction Skills, Careers, Providers, |

| | | | |
|----|---|--------|--|
| | <p>accessible learning, including the franchising of HE level provision into the region</p> <ul style="list-style-type: none"> • Increase the promotion of careers in the industry to school pupils • Develop better education industry links to increase understanding of the modern construction sector. • Develop role models and associated literature, possibly highlighting the lifestyle benefits of a construction career in Mid Wales • Boost sector image through presentations to schools, careers advisors and other key influencers, including parents | | |
| 13 | <p>Improve data availability to identify learner numbers per qualification aim and location of learning.</p> <p>Engage with Construction Skills to revise employment models to fit with current Welsh sub-regions</p> | Short | ELWa, Construction Skills |
| 14 | <p>Develop trainer skills in retiring tradespeople to encourage skills transfer through work-place mentoring or their becoming tutors</p> | Medium | Construction Skills, Providers, Employers. |
| 15 | <p>Develop school activities such as artisan's clubs</p> | Medium | Providers, Schools, Careers, Construction Skills |
| 16 | <p>Work within the new credit and qualification framework to deliver bite-sized courses – encouraging training through gaining credits</p> | Medium | Construction skills, Providers, ELWa, employers |
| 17 | <p>Address current need for general builders and electricians to maintain the sector as retirements occur. Actions to address skills gaps. 22% of interviewees acknowledged a skills gap in their existing workforce, mainly affecting electricians and skilled general builders.</p> | Medium | Construction Skills, Providers, Employers, ELWa |
| 18 | <p>Develop a regional approach to planning. A need for regional planning may be best served by a regional or sectoral level approach, reporting to CCETs and making recommendations to other key planning bodies, such as 14-19 Networks</p> | Medium | Providers, Employers. |
| 19 | <p>Investigate franchising HE construction courses into Mid Wales.</p> <ul style="list-style-type: none"> • There is currently no HE provision in any built environment subject in the region | Medium | ELWa, Construction Skills, Providers |

1 Background to the Construction Sector in Mid Wales

Economic Profile

1.1 Construction is an important economic and employment sector for Mid Wales.

According to Labour Force Survey¹ estimates, the industry accounts for 8.7% of all employment and self-employment across Mid Wales (9,000 people). This is the highest regional proportion in Wales.

Figure 1 Construction Sector Employment, Mid Wales in Context 2002

| Area | Employment | % |
|------------------|------------|-----|
| Mid Wales | 9,000 | 8.7 |
| North Wales | 22,000 | 7.8 |
| South East Wales | 45,000 | 7.3 |
| South West Wales | 22,000 | 8.2 |
| Wales | 98,000 | 7.7 |

Source: Labour Force Survey, Mar 2001- Feb 2002

1.2 The sector has particular value in a predominately rural area such as Mid Wales, as it can be competitive at a local level, providing relatively well-paid and skilled indigenous employment for local people.

1.3 Demand in the construction sector in Mid Wales has recovered over the last year and the industry is currently prospering in line with performance across the UK. Powys and Ceredigion experiencing £77m worth of new construction orders in 2002 and Ceredigion in particular is likely to see increased investment as a result of the South Ceredigion Regeneration Initiative, which includes substantial planned spend on capital projects over the short to medium term.

Figure 2 New Orders by Type and Region, Wales: 2002

| Current Prices in £ millions | NEW HOUSING | | | Infrastructure | OTHER NEW WORK | | |
|------------------------------|--------------|-----------|------------|----------------|----------------|--------------------|--------------------|
| | All New Work | Public | Private | | Public | Private Industrial | Private Commercial |
| Region | | | | | | | |
| Ceredigion | 40 | 1 | 12 | 5 | 13 | 1 | 8 |
| Gwynedd | 95 | 0 | 7 | 17 | 13 | 23 | 35 |
| Powys | 37 | 0 | 19 | 6 | 6 | 2 | 4 |
| Wales | 1376 | 33 | 351 | 257 | 341 | 82 | 312 |

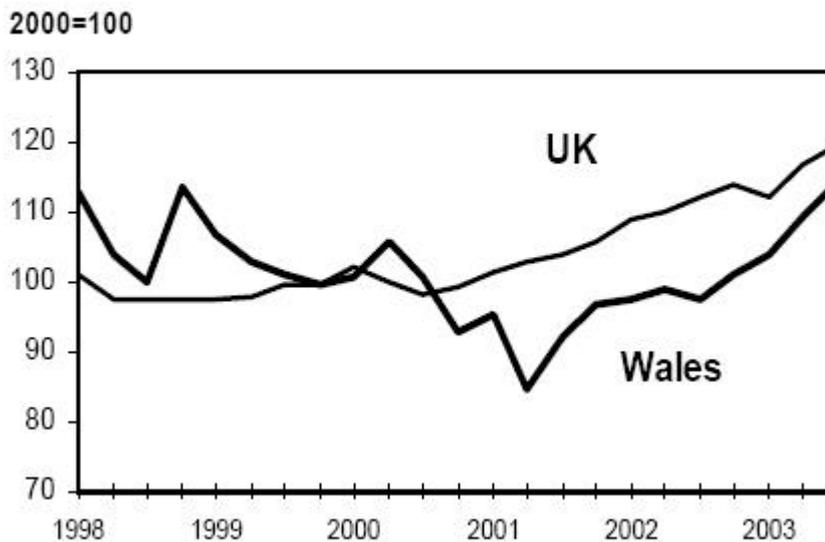
Source: Department of Trade and Industry, 2003

¹ 2002-2002

The Index of Construction² shows that construction output in Wales grew strongly during 2003. In the 12 months up to third quarter 2003, construction output grew by 9.6%, compared with 6% for the UK as a whole.

Figure 3 Index of Construction Output – Wales vs UK

Index of Construction



Source: National Statistics First Release, Jan 2004.

1.4 However, new orders in Mid Wales in 2002 accounted for just 5.6% of the Wales total and there are signs that growth in the sector is now beginning to slow.

1.5 The sector in Mid Wales (as across the UK) is dominated by SME's, the majority of which are sole traders with 5 employees or less, and which tend to be local in their focus of activities - both in terms of suppliers and customer base.

1.6 This implies that many opportunities, and possibly the bulk of larger contracts, are let outside Mid Wales – with local firms acting as sub-contractors or being excluded altogether.

1.7 For example, during the last quarter of 2003, one major public contract was awarded in Mid Wales – a contract for preparatory works on the £20m Aberporth airfield site development. The breakdown of responsibilities for all aspects of the successful tender is listed below – all parties are based outside Mid Wales.

² National Statistics

Figure 4 Contractors for Aberporth Airfield Preparatory Works, August 2003.

| Area of Responsibility | Contractor | Based |
|----------------------------|---|-------------------------|
| Architect | Fairhurst Design Group Ltd (Architect/Interior Desr) | Manchester |
| Project Manager | White Young Green (Mechanical/Electrical) | Bristol |
| Consulting Civil Engineers | White Young Green (Mechanical/Electrical) | Cardiff |
| Design and Build | Jones Brothers (Henllan) Ltd (Construction) | Cross Hands, Carmarthen |

Source: Glenigan, 2003

Employment Profile

1.8 According to the Annual Business Inquiry³, there are a total of 1200 construction employers in Mid Wales, of which by far the majority employs less than 10 people.

Figure5 Construction Employers in Mid Wales, by Size of Organisation

| AREA | 1-10 employees | 11-200 or more employees |
|------------------------|----------------|--------------------------|
| Brecon and Radnorshire | 300 | * |
| Ceredigion | 300 | * |
| Meirionnydd Nant Conwy | 200 | * |
| Montgomeryshire | 300 | * |
| TOTAL | 1,100 | 100 |

Source: Annual Business Inquiry, 2000/NOMIS. * Figures suppressed to avoid identifying individual businesses. All figures rounded to the nearest 100.

1.9 The make-up of the employed workforce is predominantly full-time (90%) and overwhelmingly male (90%).

Figure6 Employed Construction Workforce in Mid Wales

| AREA | MALE | FEMALE | TOTAL | FULL-TIME | PART-TIME |
|------------------------|-------|--------|-------|-----------|-----------|
| Brecon and Radnorshire | 1,700 | 200 | 1,900 | 1,700 | 200 |
| Ceredigion | 600 | - | 600 | 600 | - |
| Meirionnydd Nant Conwy | 800 | 100 | 900 | 800 | 100 |
| Montgomeryshire | 1,500 | 200 | 1,700 | 1,600 | 200 |
| TOTAL | 4,600 | 500 | 5,100 | 4,700 | 400 |

Source: Annual Business Inquiry, 2000/NOMIS All figures rounded to the nearest 100.

1.10 This total is significantly smaller than the Labour Force Survey estimate of 9,000 people active in the sector. The difference of 3,900 provides an estimate of the number of self-employed construction workers in the region.

1.11 Data from Jobcentre Plus for construction related vacancies in Mid Wales⁴ shows average weekly pay offered for construction related trades was broadly in line with other areas of Wales (with the exception of bricklayers, who were offered 50% higher

³ ONS, 2000

⁴ Quoted in *Job Outlooks*, Miller Research for FSW Partnership, 2003. www.futureskillswales.com

wages in SE Wales). It should be emphasised that this data relates to jobs advertised at all grades and not average wages for those in employment.

Figure 7 Hourly Starting Rates for Jobs Advertised in Job Centres – Mid Wales, October 2001 – June 2002.

| Occupation | No. of Vacancies | Ave. Hourly Starting Pay, £ |
|--------------------------------|------------------|-----------------------------|
| Bricklayers | 111 | 5.85 |
| Building Technicians | 12 | 6.64 |
| Building / Construction Worker | 118 | 4.47 |
| Electrical Trades | 2 | 5.90 |
| Plasterers | 12 | 6.24 |
| Plumbers | 4 | 4.86 |
| Roofers / Tilers / Slaters | 8 | 4.79 |
| Woodworkers | 9 | 5.29 |

Source: *Job Outlooks, 2003. www.futureskillswales.com*

The Future

1.12 Table 8 shows total Welsh construction output and employment over the period 1995–2007⁵. At 1%, the forecast growth rate (2003–2007) in output in Wales is well below the UK average forecast of 2.1%.

Figure 8 Total Construction Output and Employment, Wales: 1995 – 2007

| Year | | Total Output Growth Rate, % | Total Output £m 1995 prices | Total Employment (Direct and Indirect) |
|-----------------|------|-----------------------------|-----------------------------|--|
| Actual | 1995 | 0.9 | 2,300 | 59,900 |
| | 1996 | -7.0 | 2,140 | 62,200 |
| | 1997 | 7.0 | 2,290 | 63,100 |
| | 1998 | -1.3 | 2,260 | 67,700 |
| | 1999 | -4.9 | 2,150 | 73,700 |
| | 2000 | -7.0 | 2,000 | 71,800 |
| | 2001 | -6.5 | 1,870 | 69,000 |
| | 2002 | 7.5 | 2,010 | 92,110 |
| Forecast | 2003 | 0.0 | 2,010 | 92,770 |
| | 2004 | 0.5 | 2,020 | 93,750 |
| | 2005 | 1.5 | 2,050 | 94,190 |
| | 2006 | 1.5 | 2,080 | 95,250 |
| | 2007 | 1.4 | 2,110 | 96,380 |

Source: *CITB Employment Model, 2003*

⁵ Please note that the total employment figures shown are based on Labour Force Survey estimates of total UK construction employment. In 2002 this was approximately 2 million.

1.13 Between 2003 and 2007, the CITB forecasts an annual growth in requirement for skilled construction workers in Powys and West Wales (incorporating Ceredigion) of, on average, 1,010 workers. These figures take account of new entrants needed to replace retiring workers, as well as extra staff needed because of growth in the sector.

1.14 For Wales as a whole, the average annual requirement is for 3,800 extra workers and at UK level, the requirement will be for 76,000 new skilled recruits every year.

Figure9 West Wales* Total Employment & Annual Requirement by Occupation: 2003 – 2007

| | Total Employment | | Average Annual Requirement | Cumulative Requirement | Ann. Req, as a percentage of 2003 employees |
|---|------------------|---------------|----------------------------|------------------------|---|
| | 2003 | 2007 | (2003-2007) | (2003-2007) | |
| Managers | 1,480 | 1,590 | 60 | 310 | 4.1% |
| Clerical | 1,290 | 1,210 | 50 | 250 | 3.9% |
| Professionals | 1,240 | 1,340 | 50 | 270 | 4.0% |
| Technicians | 430 | 460 | 20 | 90 | 4.7% |
| Wood Trades | 2,960 | 3,040 | 120 | 620 | 4.1% |
| Bricklayers | 2,020 | 1,950 | 80 | 400 | 4.0% |
| Painters | 1,290 | 1,260 | 50 | 270 | 3.9% |
| Plasterers | 370 | 300 | 10 | 70 | 2.7% |
| Roofers | 650 | 670 | 30 | 130 | 4.6% |
| Floorers | 270 | 280 | 10 | 60 | 3.7% |
| Glaziers | 650 | 660 | 30 | 130 | 4.6% |
| Other SB Operatives ⁽¹⁾ | 590 | 560 | 20 | 120 | 3.4% |
| Scaffolders | 200 | 210 | 10 | 40 | 5.0% |
| Plant Operatives | 960 | 1,020 | 40 | 200 | 4.2% |
| Plant Mechanics/Fitters | 220 | 230 | 10 | 40 | 4.5% |
| Steel Erectors/Structural | 260 | 310 | 10 | 60 | 3.8% |
| Other CE Operatives ⁽²⁾ | 1,080 | 1,120 | 40 | 220 | 3.7% |
| General Operatives | 990 | 970 | 40 | 200 | 4.0% |
| Maintenance workers | 150 | 180 | 10 | 30 | 6.7% |
| Electricians | 1,890 | 1,950 | 80 | 400 | 4.2% |
| Plumbers | 1,390 | 1,530 | 60 | 300 | 4.3% |
| Non-construction operatives | 310 | 320 | 10 | 70 | 3.2% |
| Total | 20,690 | 21,160 | 830 | 4,210 | 4.0% |

Source: CITB Employment Model, 2003. Notes: ⁽¹⁾ Specialist Building, ⁽²⁾ Civil Engineering. Numbers are rounded to the nearest ten. Figures of zero indicate a number less than five.

* The CITB West Wales region includes Swansea, NPT, Carmarthenshire, Pembrokeshire and Ceredigion. Data for Ceredigion cannot be identified separately.

1.15 The requirements in Mid Wales are by no means uniform across occupational areas, with particular identified requirement for construction managers, professionals, wood trades, bricklayers, painters and plumbers, but less significant opportunities for scaffolders, steel erectors and plasterers.

Figure 10 Powys Total Employment and Annual Requirement by Occupation: 2003 – 2007

| | Total Employment | | Average Annual Requirement (2003-2007) | Cumulative Requirement (2003-2007) | Ann. Req, as a percentage of 2003 employees |
|-----------------------------|------------------|--------------|--|------------------------------------|---|
| | 2003 | 2007 | | | |
| Managers | 320 | 340 | 10 | 70 | 3.1% |
| Clerical | 270 | 260 | 10 | 50 | 3.7% |
| Professionals | 260 | 280 | 10 | 60 | 3.8% |
| Technicians | 90 | 100 | 0 | 20 | 0.0% |
| Wood Trades | 630 | 640 | 30 | 130 | 4.8% |
| Bricklayers | 430 | 410 | 20 | 80 | 4.7% |
| Painters | 270 | 270 | 10 | 60 | 3.7% |
| Plasterers | 80 | 60 | 0 | 10 | 0.0% |
| Roofers | 140 | 140 | 10 | 30 | 7.1% |
| Floorers | 60 | 60 | 0 | 10 | 0.0% |
| Glaziers | 140 | 140 | 10 | 30 | 7.1% |
| Other SB Operatives (1) | 130 | 120 | 10 | 30 | 7.7% |
| Scaffolders | 40 | 40 | 0 | 10 | 0.0% |
| Plant Operatives | 200 | 220 | 10 | 40 | 5.0% |
| Plant Mechanics/Fitters | 50 | 50 | 0 | 10 | 0.0% |
| Steel Erectors/Structural | 60 | 70 | 0 | 10 | 0.0% |
| Other CE Operatives (2) | 230 | 240 | 10 | 50 | 4.3% |
| General Operatives | 210 | 200 | 10 | 40 | 4.8% |
| Maintenance workers | 30 | 40 | 0 | 10 | 0.0% |
| Electricians | 400 | 410 | 20 | 80 | 5.0% |
| Plumbers | 290 | 320 | 10 | 60 | 3.4% |
| Non-construction operatives | 70 | 70 | 0 | 10 | 0.0% |
| Total | 4,400 | 4,480 | 180 | 890 | 4.1% |

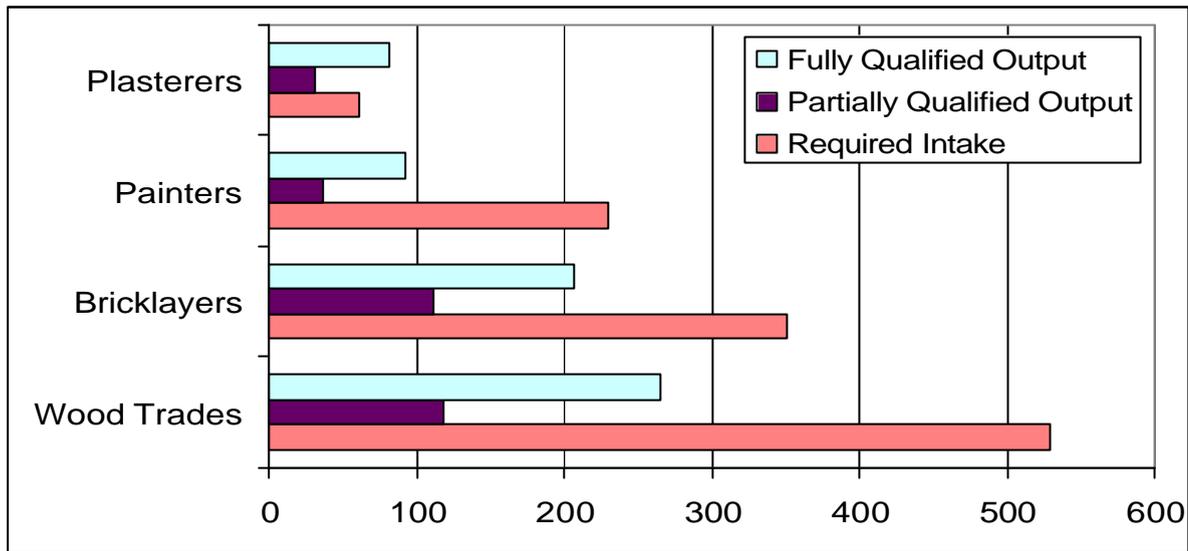
Source: CITB Employment Model, 2003. Notes: ⁽¹⁾ Specialist Building, ⁽²⁾ Civil Engineering Numbers are rounded to the nearest ten. Figures of zero indicate a number less than five.

1.16 The graph below shows the gap between industry predictions for the numbers of craftspeople required at Wales level and the estimated number achieving qualifications for four of the main building trades.

1.17 The figures predict a significant shortfall of qualified industry entrants in wood trades, bricklaying and painting. For example, qualified people cover only 50% of the required intake for Wood Trades. The inclusion of partially qualified craftspeople meets the requirement for Bricklayers, but does not eliminate the gap for either Painters or Wood Trades.

1.18 Plasterers are an exception with the expected requirement being met entirely by the supply of qualified people. Any surplus, however, needs to be considered in the context of existing shortages in other regions, and the possibility of migration from Wales.

Figure 11 Building Trades, Wales: 2003 – 2007 Annual Average Required Intake Compared with Trained Output



Source: CITB Employment Model, 2003; CITB Trainee Numbers Survey, 2002–2003

1.19 It is worth noting that the qualified output includes only those with a minimum of NVQ Level 2 (the industry’s required standard). Also, it assumes that only 60% of those beginning training will achieve a qualification (the national average). The partially qualified output includes NVQ Level 1 and assumes that a further 20% of those beginning training will join the industry. The number of Wood Trades is reduced further to reflect the fact that only just over 75% works in the construction industry.

1.20 The CITB has identified a number of scenarios for the future of the construction industry in the UK⁶ over a twenty-year period, based on current trends in the sector.

1.21 These are based around four key drivers:

- **Local Stewardship** – This scenario is based on a market focused on renovation and restoration of existing buildings, with lower demand for new construction. Growth in retro-fit energy conservation products balances some decline in general craft skills. The industry continues to be dominated by small firms, although employees will need to develop higher skills levels to address new legislation and increased regulation.
- **Provincial Enterprise** - In this scenario, maintenance and conversion of existing buildings is the primary activity, centred on traditional construction techniques.

⁶ <http://www.citb.org.uk/futureskills/>

Much of the sector remains labour intensive, with little conformance to building and other regulations. Skills remain largely unchanged from current demand.

- **Global Sustainability** – This assumes a highly regulated market with strict building controls and energy efficiency requirements. The industry would focus on new build to replace existing building stock and retro-fit conservation work on existing stock. The workforce would require highly developed skills in the use of new materials and in waste handling. Traditional skills would experience a decline.
- **World Markets** – focusing on a high-technology industry operating in a deregulated market. This implies more highly skilled, off-site fabrication with an emphasis on management and a decline in traditional craft skills.

1.22 The industry in Mid Wales is currently focused on the provincial enterprise model and this is likely to continue to be the case in the absence of initiatives to upskill the workforce beyond its current levels.

1.23 Several commentators have identified the possibilities of extending activities under the local stewardship route, with increased focus on traditional/heritage and green building skills.

1.24 Whilst the industry as a whole is moving some way along the global sustainability route, with increasing demands for energy conservation and stricter building controls, these factors are not likely to have a greater impact on the industry in Mid Wales than elsewhere.

1.25 The deregulated world market scenario is unlikely to be experienced by the industry in Mid Wales, except perhaps for an increase in the availability of pre-fabricated, ready to fit components.

1.26 This has been witnessed, for example, in areas of the building services industry, where the use of more off-site assembly of components and systems can allow installation and commissioning by a less-skilled workforce.

“Rethinking Construction” - the Egan Report (1998)

1.27 Sir John Egan was commissioned by the UK Government to lead a task force to research issues around improving UK construction performance.

1.28 The report identifies several drivers for improvement in the construction sector:

- Committed leadership.
- A focus on the customer.
- Integrate the process and the team around the product.
- A quality driven agenda.
- Commitment to people.

1.29 Regarding the final point, the report states that there is a crisis in training. *Too few people are being trained to replace the ageing skilled workforce, and too few are*

acquiring the technical and managerial skills required to get full value from new techniques and technologies. Construction also lacks a proper career structure to develop supervisory and management grades

1.30 In addition, Egan identifies the poor health and safety record of construction, especially amongst those either not properly trained or working outside specified practice.

1.31 The report highlights a series of gaps in training:

- At the top management level. The industry needs to create the necessary career structure to develop more leaders of excellence.
- At the project manager level, there is a need for training in integrating projects and leading performance improvement, from conception to final delivery.
- The UK has one of the highest levels of supervision on site internationally but one of the poorest records of training for supervisors.
- Among designers, the professional competence achieved in their training and development need to be matched by a more practical understanding of the needs of clients and of the industry more generally.
- There is not enough multi-skilling. The experience of other industries is that heavily compartmentalised, specialist operations detract from overall efficiency.
- Upgrading, retraining and continuous learning are not part of construction's current vocabulary. Innovations are blocked because construction workers cannot cope with the new technologies.

1.32 In the view of the report, training will be given greater emphasis if all major clients, including the public sector, give preference to constructors who can demonstrate that they use trained workers. One way of achieving this is for major clients to insist that workers hold valid cards under the Construction Skills Certification Scheme.

The Green Building Sector

1.33 Although currently in its infancy, the green building sector in Mid Wales offers significant potential for development. There are a number of organisations in the region with a stake in environmentally conscious building and the sector enjoys some synergies with the traditional building and restoration sector.

1.34 A Green Building event is to be held at the Royal Welsh Showground, Builth Wells in September 2004. The event is being organised by a partnership including the WDA, Centre for Alternative Technology, Dyfi Eco Park, Association of Environmentally Conscious Builders and Ty-Mawr Lime.

Skills and Learning

1.35 Despite its continued growth, the construction sector is experiencing a shortage of skilled workers both at UK level and in Mid-Wales. According to the organisation

“Rethinking Construction” 76% of UK companies report that a shortage of skilled site operatives is impacting on their activities.

1.36 Construction companies across the UK are reported to be increasing spend on staff training, partly in response to legislative and best practice requirements, although the sector still lags behind the UK industrial average. This latter fact could in part be due to the informal, unrecorded nature of much on-the-job training.

Industry Support

1.37 Construction Skills is the new SSC⁷ for the construction sector, licensed in September 2003 and covering a wide range of sectors in the development and maintenance of the Built Environment, including:

- Housebuilding (public and private)
- Infrastructure (roads, railways and utilities)
- Non residential building in the private sector (schools and colleges, hospitals, offices)
- Industrial building by the private sector (factories, warehouses)
- Commercial building by the private sector (offices, shops, entertainment, health and education)
- Repair and maintenance work in all sectors

1.38 In addition to the activities within the remit of the CITB, Construction Skills covers the renting of construction machinery and professional and design work in consultancies (engineering, architecture and surveying).

1.39 Summit Skills is the proposed sector skills council for services related to construction, including the electrotechnical, heating, ventilating, air conditioning, refrigeration and plumbing industries.

1.40 Whereas the CITB is one of only two industry-training boards to receive a levy from employers considered to be in scope, Summit Skills does not receive an employer levy and these parts of the sector may experience a comparative lack of funding for training as a result.

1.41 Construction Skills funds a range of education, training and awareness raising activity in the industry. One example of this is a training network in Carmarthenshire, in Partnership with Coleg Sir Gar.

⁷ Sector Skills Council

Summary

- Construction is a regional employment strength in Mid Wales, accounting for 8.7% of all employment, compared with a Wales average of 7.7%.
- Powys and Ceredigion experienced £77m of new orders during 2002, of which £32m was for housing. Public investment was boosted by regeneration works in South Ceredigion.
- The sector in Mid Wales is characterised by a high proportion of small and micro businesses, relying on multi-skilled staff and informal networks to complete projects. Many larger contracts are let to organisations from outside the region, which may then sub-contract a proportion of the work at a local level. Employment is heavily biased towards males and full-time working.
- There are local strengths in building restoration and repair and the potential for expanding green building skills in Mid Wales has been identified.
- Industry forecasts predict an overall staff requirement of 180 new entrants for Powys per year up to 2007, of which almost half are required to cover retirements. This implies an average requirement for Mid Wales as a whole of around 325 people annually. However, the number of new entrants into training across the whole of Wales for 2002 was 2995, implying a Mid Wales "share" of 260. The most significant demands are expected to be for wood trades, bricklayers, electricians, managers, painters, professionals and plumbers. At a Wales level, there are expected to be shortages of qualified entrants into wood trades, bricklaying and painting.

2 Stakeholder Interviews

Introduction

2.1 In order to secure a perspective on the industry in Mid Wales, interviews were held with some 20-25 representatives of public and private sector agencies. These included key personnel from CITB, WDA, JobCentre Plus, ELWa, Rethinking Construction, CIC⁸, CECA⁹, Summit Skills and local authorities.

2.2 The results of these discussions are summarised here. The narrative is intended to provide a measure of the issues of concern and the opinions and perceptions of stakeholders.

Training Needs

2.3 One of the main themes discussed was the effect of legislation and voluntary standards in the industry driving training. This has, for example, led to significant levels of training to meet CSCS¹⁰ standards or for accrediting oil fitters.

2.4 The introduction of legislation relating to corporate killing is likely to drive up standards on larger sites in particular, as employers and contractors need to ensure that staff are suitably skilled and qualified for the tasks they undertake.

2.5 Entry level training is currently targeted at pre-NVQ 1 levels, but recruits need to achieve NVQ level 2 before they are regarded as effective onsite and NVQ level 3 is preferable. This low-level targeting may be in response to the academic calibre of students being encouraged to enter the industry and may reflect a need to develop a two-strand approach to delivery:

- "Catch up" packages to bring entry level students up to Level 2, reflecting the needs of industry.
- Action to address negative perceptions of the industry and to increase its attractiveness to academically more able students.

2.6 Both CITB and Summit Skills have reported major shortages in candidates suitable for construction management positions. Learners wishing to take construction-related degrees need to move out of Mid Wales, although such courses are available at the University of Glamorgan.

2.7 On Site Assessment and Training (OSAT) has been, on the whole very well received with the CITB responding to many requests for assessment. However, the absence of an employer levy still limits the funding and hence the take-up of this scheme in the

⁸ Construction Industry Council

⁹ Civil Engineering Contractors Association

¹⁰ Construction Site Certificate of Safety

trades represented by Summit Skills. Distance issues and sometimes a perceived lack of cooperation affect some OSAT initiatives by colleges.

2.8 Employers are perceived to be becoming more proactive in training their workforce, and the upskilling of existing workers is on the increase. This may partially be due to employers being more confident that these workers will not provide competition once qualified. For example, the upskilling of existing labourers is reported to be widespread in the scaffolding trade.

Barriers to Learning

2.9 Interviewees felt that growth in demand for construction learning in Mid Wales is likely to be constrained by a number of factors relating to specific conditions in the region:

- The major issue regarding training in Mid Wales is the distance necessary for potential candidates to travel to training establishments. Several of the industry stakeholders interviewed advocated the development of mobile training units or e-learning initiatives as means of facilitating learning. The CITB provides assistance to some trainees regarding their transport or accommodation costs, but this alone does not eliminate these issues.
- In Mid Wales, training is centred on Coleg Powys (with centres at Newtown and Brecon) Coleg Ceredigion and Coleg Meirion Dwyfor, which provide courses focused around bricklaying and carpentry and, to a lesser extent, painting and decorating. The availability of different courses, such as gas related, at other colleges has meant that trainees travel significant distances in order to learn, e.g. to Neath, Pembroke, Shrewsbury or Hereford. (See Appendix 1)
- The current funding and qualification framework favours full-time provision. However this is at odds with the industry's specified preference for bite-size courses or on-site learning.
- The nature of the industry in Mid Wales, with a high proportion of micro businesses, has increased the demand for multi-skilled workers. However, providers have met with difficulties in engaging learners to fill such provision. For example, attempts to set up a multi skilled construction course at the Coleg Powys Brecon site have not been perceived to be successful to date.

2.10 Project-specific training, relating to a customised mix of skills necessary for a single project, is also on the increase and this can present particular challenges to providers.

2.11 Some observers are sceptical regarding the WAG¹¹ initiative to include the employment and training of the economically inactive as a pre-condition for some tendered work. Industry representatives perceive this group to be unreliable as workers, and would prefer initiatives that target those who are currently in

¹¹ Welsh Assembly Government

employment but who are seeking a career change. The New Deal programme enables the economically inactive to train to NVQ level 1 at Coleg Ceredigion.

2.12 The principle difficulties facing those new entrants who wish to learn a construction skill, according to a recent CITB survey, are:

- A shortage of places on the appropriate college courses
- A lack of adequate work placement opportunities during which trainees can really “learn their trade” and gain qualifications.

2.13 This latter factor is anecdotally reported to be a particular issue for Mid Wales students, partially due to the predominance of micro-businesses and self-employed sole traders, who would find it difficult to devote the time and attention necessary to supervising and supporting a trainee. This group of traders appears to favour a network model of working, with informal groups of self-employed, skilled tradespeople coming together to deliver individual projects and then disbanding subsequently. Such an arrangement makes sustained training placements difficult to establish and maintain.

Apprenticeships

2.14 Finding suitable, relevant work placements is an issue amongst trainees who have not identified their employers prior to commencing training. Employers are often unwilling to train up potential competitors. However, this phenomenon is sometimes mitigated by the close-knit nature of communities and the industry in Mid Wales.

2.15 Sole traders are often unwilling to take on apprentices, as they cannot afford to spend the extra time needed to train them up, this is particularly true in the plumbing sector. Sole traders may also be reluctant to take on apprentices due to increased insurance costs and the increased time taken to complete jobs when apprentices are involved. Some tradesmen are also put off from training apprentices by the fact that they have had little formal education or qualifications themselves.

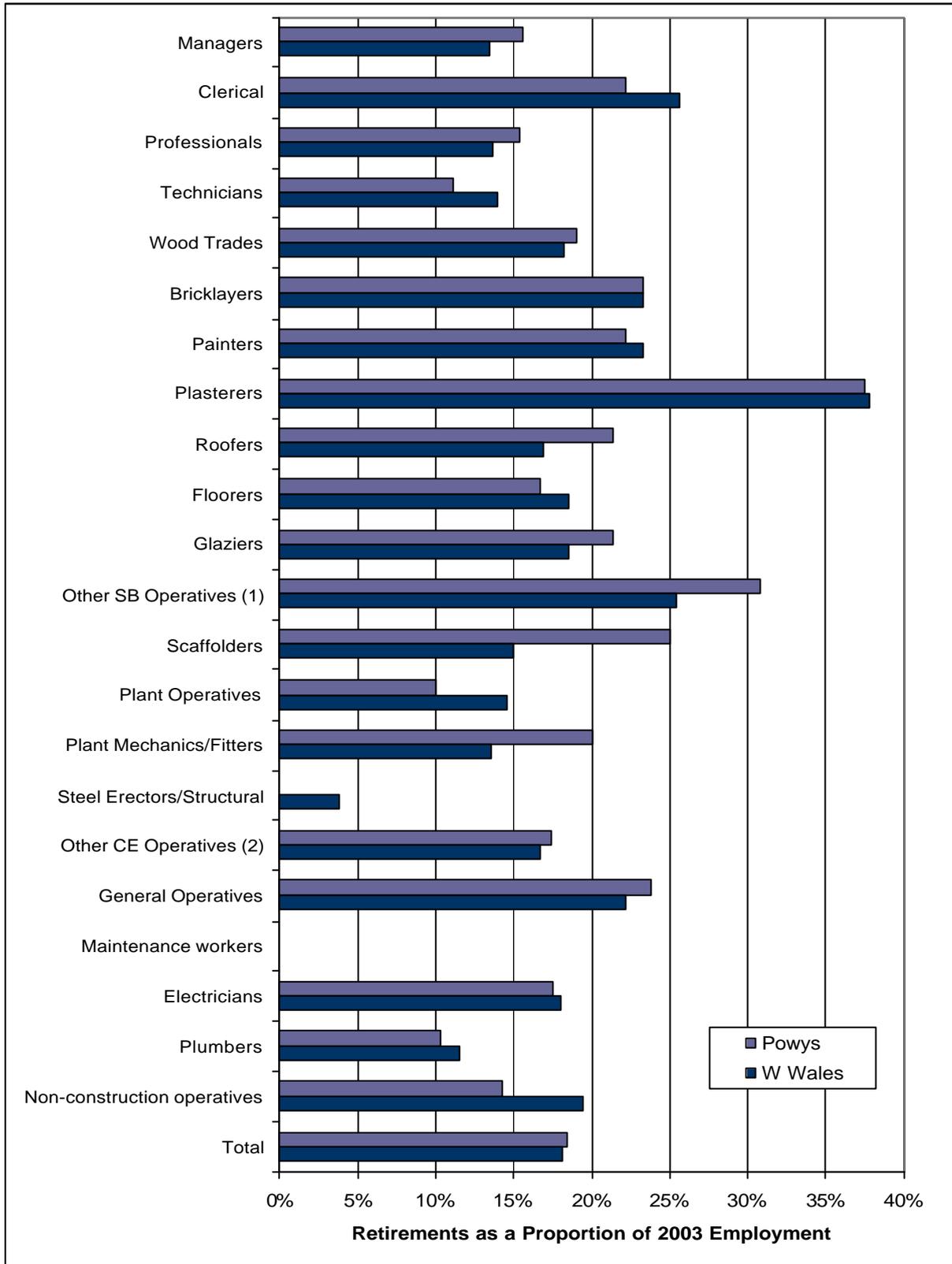
2.16 The issue of trainee’s remoteness of location in relation to work placement sites is one that is considered to be significant.

2.17 Employers have improved their performance as regards the provision of the portfolios required for trainees to receive their qualifications. However, given the small size of businesses in Mid Wales, it is sometimes unviable for trainees to work solely in the trade of their choosing, as very often they are required to “muck in” on other tasks unrelated to their trade. Employers are also reticent about taking on apprentices who have to follow the block system of 22 weeks classroom learning followed by 22 weeks working, which is the scheme adopted by Powys training providers sub-contracting to Coleg Powys.

Industry Image

- 2.18 The relatively attractive financial rewards available for workers in the construction industry appear to have been noticed by young people, as evidenced by increased enquiries for key courses such as plumbing. However, the sector still suffers from image problems regarding working conditions and the perceived strenuous nature of the work involved. Some commentators feel that improvements in these areas have not been communicated sufficiently to key influencers such as parents and careers advisors.
- 2.19 The CITB has devoted substantial resources to improving the image of the sector. It organises regular events at schools and stages National Construction Week, where a number of events take place to try and increase the interest in the sector amongst young people. However, the success of these events can be affected by the viability of children having to travel substantial distances to attend.
- 2.20 Careers advisors were criticised by some interviewees for failing to promote the sector, with communication seen by some as a one-way process. Candidates referred by careers guidance officers have frequently achieved below-average GCSE's, with the more able pupils encouraged to stay on and study for A-levels. This can often result in recruits to the industry not possessing the requisite skills for the sector, for example, the IT skills needed to operate modern equipment. Conversely, reports of candidates turning to a construction apprenticeship after failing to find employment on graduation in another discipline are not uncommon.
- 2.21 White males dominate the sector nationwide, with females and ethnic minorities being very few in number. In Mid Wales, almost 90% of the construction workforce is male.
- 2.22 In certain trades, the demographic profile is expected to lead to skills shortages, as a significant proportion workforce is approaching retirement. For example, amongst bricklayers it is forecast that 20 new entrants will be required in Powys each year for the next three years, simply to maintain the requirements of a declining occupation.
- 2.23 Data from Construction Skills forecasts that approximately 38% of plasterers in Mid Wales will retire between 2003 and 2007. However, decline in demand means that the overall requirement for plasterers will be relatively low.
- 2.24 Other occupations facing high levels of retirement include specialist building operatives, lower-skilled general operatives and bricklayers.
- 2.25 Certain trades, especially those mainly comprising sole traders, may face succession issues in parts of Mid Wales.

Figure 12 Forecast Retirements 2003-2007, as a Proportion of 2003 Employment



Source: CITB / Miller Research. Figures are not available separately for either Ceredigion or Meirionnydd, which falls into the North Wales forecasts. However, the general message is likely to be similar to that elsewhere in the Mid Wales region.

The Future

2.26 The future of the sector in Mid Wales is expected to be positive, as long as the sector remains buoyant nationally. Some trades are likely to continue to experience a shortage in personnel, and the situation may deteriorate in other sub-sectors as more of the ageing workforce retires.

2.27 Key drivers of change for Mid Wales are identified as:

- The sale of social housing to housing associations
- Investment in South Ceredigion area renewal
- WDA and other initiatives, which require contractors to prove their employment of qualified personnel.
- Major projects include a road-building project from Llandrindod to Builth.

2.28 Changes to the national curriculum that increase the presence of vocational courses in schools will help to promote such career routes. Improved relations between industry, schools and careers services would also benefit all parties.

2.29 Mid Wales is actively establishing partnerships to deliver the 14-19 curriculum. These groups will be in a position to substantially influence the availability of access to vocational provision for this age group.

2.30 In Mid-Wales, measures to reduce the need to travel large distances to learn would be welcome. These could include mobile learning centres and OSAT, e-learning programmes or more assistance given to trainees as regards transport or lodging costs.

Summary

- Legislation and voluntary standards in construction are currently driving training, especially with regard to site safety qualifications.
- Increasing technical standards have led to a basic requirement for new entrants to be qualified to Level 2, or preferably Level 3. However, much existing entry-level training is at Level 1 or below, possibly reflecting the calibre of young people being encouraged to enter the industry.
- On-site assessment and training (OSAT) is increasingly used, especially where funding is available from Construction Skills. Employers generally are perceived to be increasingly proactive in training their workforce.
- Major barriers to training are reported to be:
 - Travelling distance, time and costs
 - Lack of availability of some courses (such as gas related) in Mid Wales
 - The current funding framework, which is perceived to work against provision of "bite-sized" courses.
 - The nature of the industry in the region
 - A lack of suitable work placement opportunities
- Despite efforts to publicise improvements in pay and conditions in construction, the industry retains a relatively poor image as a career choice for young people, perhaps especially amongst parents and other influencers. Despite this, applications for certain courses, such as plumbing, have been increasing.
- Stakeholders were generally optimistic about medium-term performance in construction in Mid Wales, subject to skills shortages arising as existing staff retire. Some key drivers of performance are identified as:
 - The sale of social housing to housing associations
 - Investment in South Ceredigion area renewal
 - Public initiatives requiring contractors to employ qualified personnel.
 - Major infrastructure work - including a road-building project from Llandrindod to Builth
- Key changes that would improve the delivery of construction skills were seen as:
 - Improved partnership working, especially in the context of the 14-19 curriculum
 - Reduction in travel to learn, possibly through more OSAT, use of mobile centres and e-learning.

3 Employer Survey

Introduction

3.1 Beaufort Research Ltd carried out the telephone survey of 101 employers between 6th and 10th November 2003. The research universe comprised businesses based in Ceredigion, Powys and Meirionnydd, within the SIC 2000 category F – the Construction sector.

3.2 The sample was drawn from the Experian Business Database, with quotas set for business size and, for businesses with 11 or more employees, on SIC code within the sector. Interviews achieved represented 13% of all businesses employing 10 or fewer staff and 20% of all those with 11 or more employees across the region.

3.3 Results were weighted back, to ensure that the data was representative of all construction businesses in Mid Wales.

3.4 In order to maximise the response rate, a letter was sent out on ELWa letterhead prior to interviewing beginning, informing them about the survey and requesting their co-operation.

Figure 13 Interviews achieved – Unweighted and weighted data

| | Unweighted | Weighted | Universe | % Sample |
|----------------------------|------------|----------|----------|----------|
| Total | 101 | 101 | 762 | 13 |
| Area | | | | |
| Ceredigion | 29 | 31 | 465 | 13 |
| Powys | 61 | 57 | 219 | 13 |
| Meirionnydd | 11 | 12 | 78 | 14 |
| Number of Employees | | | | |
| 1-10 | 89 | 94 | 703 | 13 |
| 11 or more | 12 | 7 | 59 | 20 |

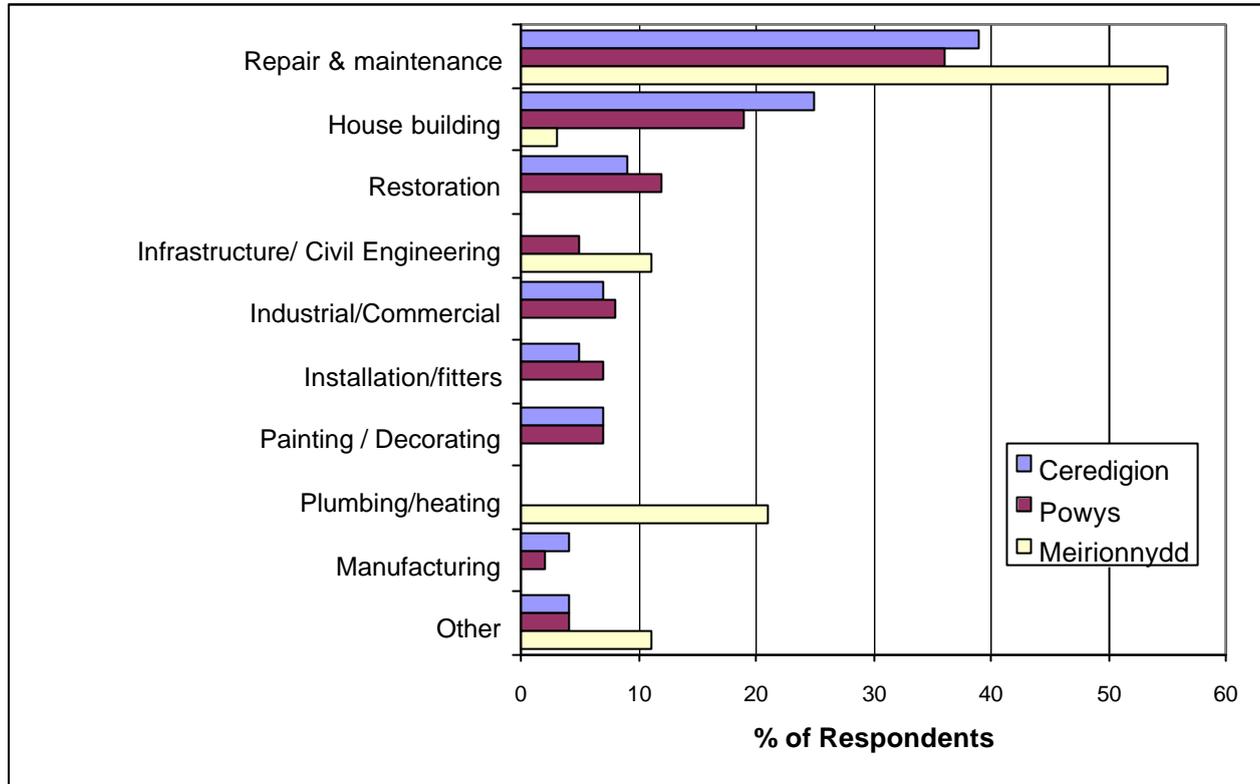
Source: Beaufort Research, 2003 / Experian

3.5 All results in the following section feature weighted data.

Survey Results – Business Background

3.6 The main activities of the two largest groups of respondents were repair and maintenance, along with house building.

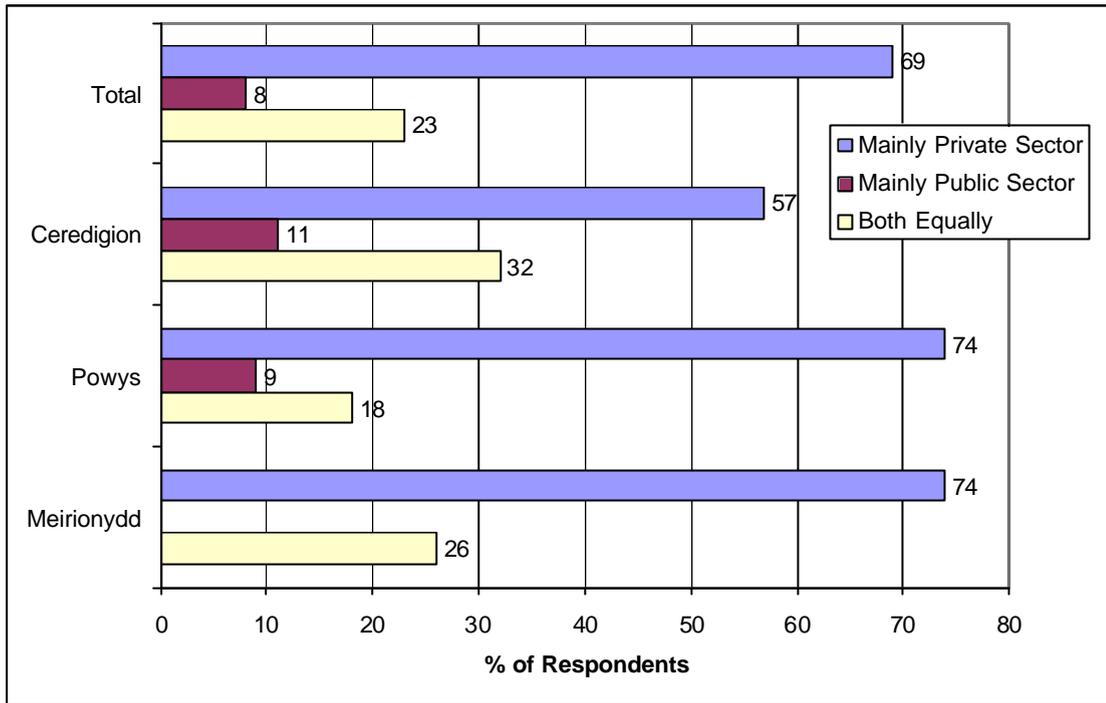
Figure 14 Main Business Activity of Survey Respondents



Source: Employer Telephone Survey, q2 (Base= 101 interviews)

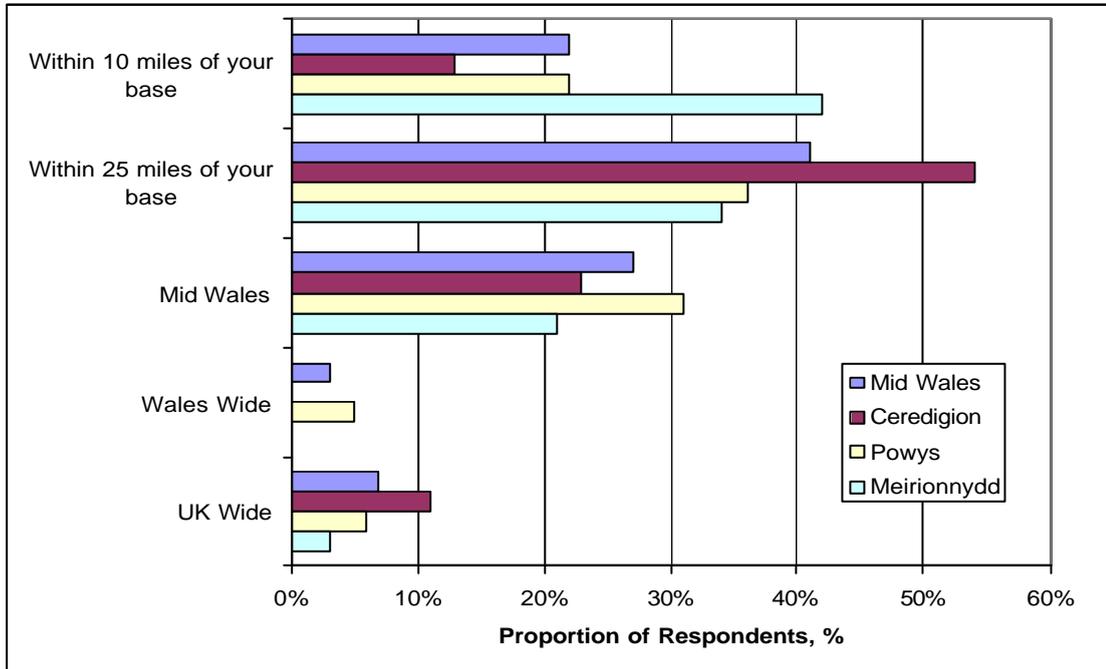
- 3.7 Almost 70% of those interviewed work mainly in the private sector, whilst just 8% concentrated on jobs in the public sector. Almost one quarter saw public and private sector work as equally important markets for their business.
- 3.8 Nearly two-thirds of businesses overall were sole traders, whilst 23% were partnerships and just 11% limited companies.
- 3.9 Sixty-two percent of businesses interviewed mainly serve markets within 25 miles of their base. Smaller employers were more likely to focus on their local area and those based in Meirionnydd were more likely to work within a 10-mile radius of their base.

Figure 15 Main Client Group of Survey Respondents



Source: Employer Telephone Survey, q3. Base=101 responses.

Figure 16 Where are Your Main Markets Located?

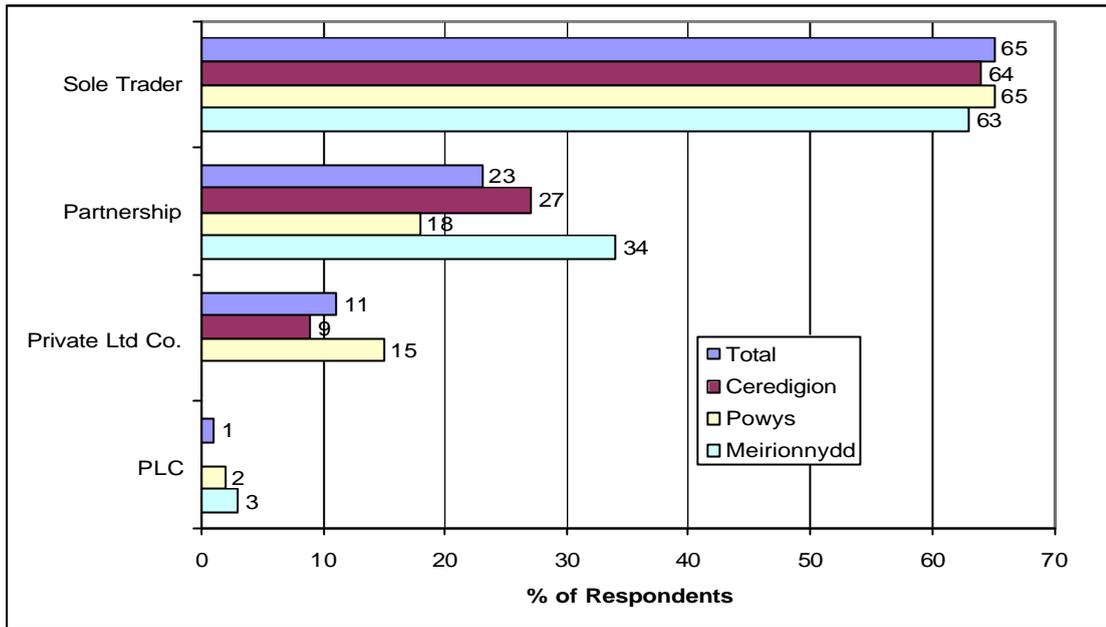


Source: Employer Telephone Survey, q39. Base=101 responses.

3.10 In almost all cases (96%), the main decisions regarding recruitment and training were made on the business site taking part.

3.11 All the businesses interviewed were independent, as opposed to being part of a wider group.

Figure 17 Ownership of Survey Respondents' Businesses



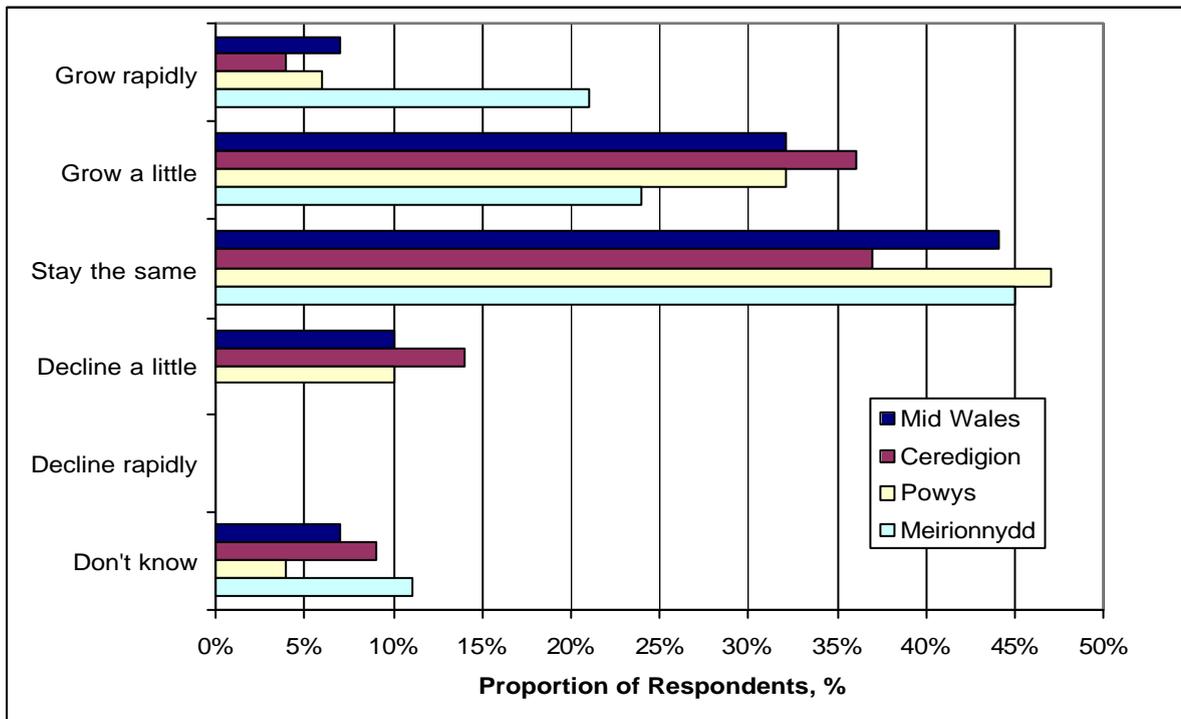
Source: Employer Telephone Survey, q4. Base=101 responses.

Business Optimism

3.12 A balance of 30% of employers expect their market to grow over the next 12 months.

Meirionnydd employers were especially optimistic, as were larger employers. Very few businesses expect a decline in the market next year.

Figure 18. Over the next 12 months, would you say that the market is likely to?

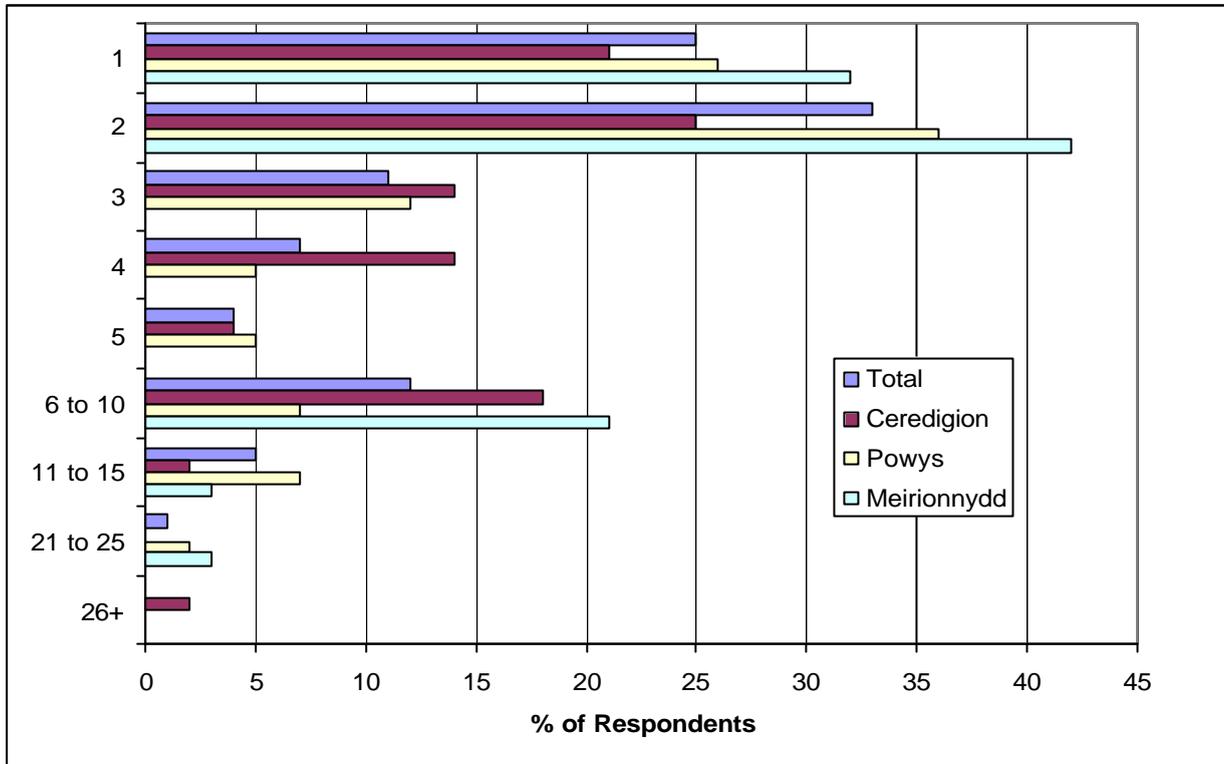


Source: Employer Telephone Survey, q40. Base=101 responses.

Employment

3.13 The average number of employees in respondent businesses was 3.8. Only two companies were interviewed that employed more than 25 people.

Figure 19 Number of Employees within Surveyed Businesses



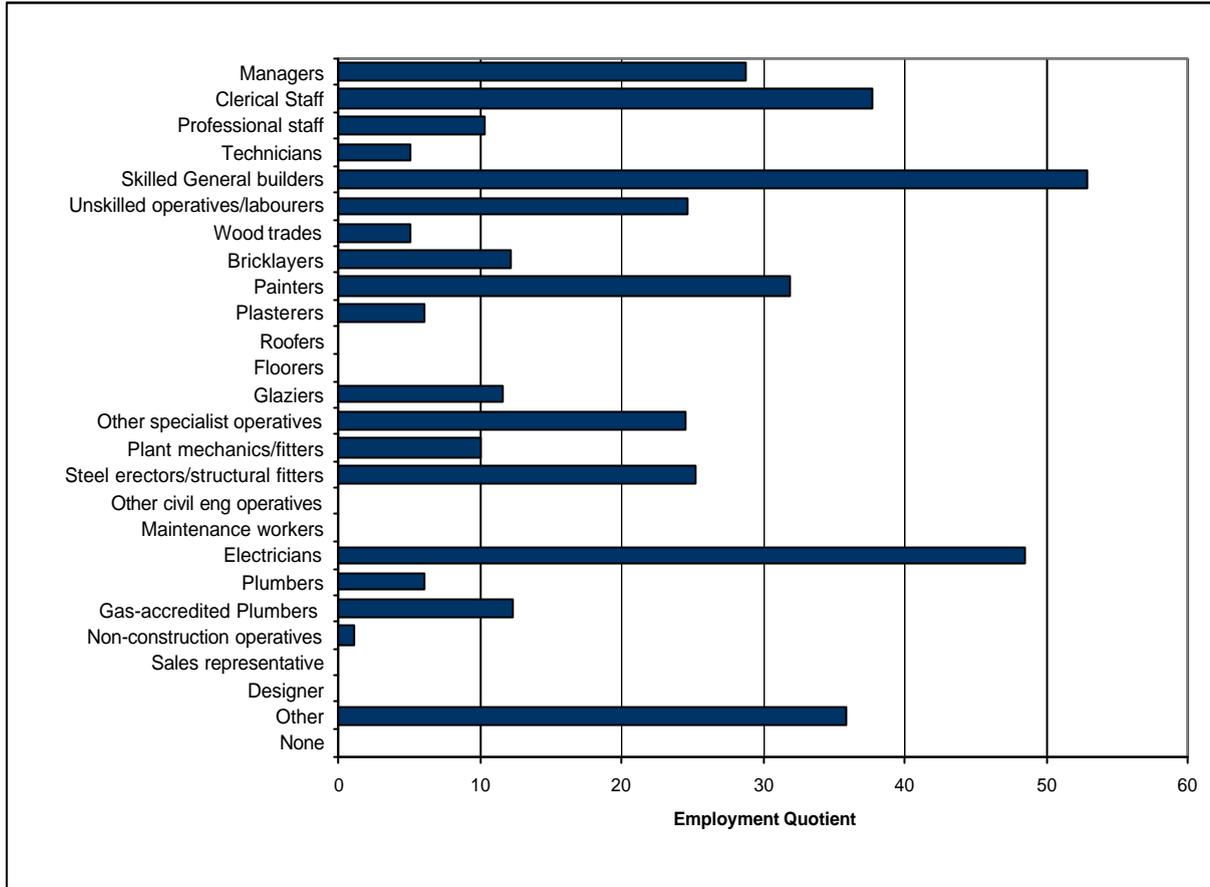
Source: Employer Telephone Survey, q7. Base=101 responses.

3.14 The employment profile of the industry in Mid Wales is estimated below. This has been constructed by asking employers how many employees they have in each of the occupations listed, and multiplying the average result by the number of responses.

3.15 It can be seen that the most common occupation is skilled general builders – reflecting the multi-skilling needs of predominately small building firms. These are followed by electricians, clerical staff, painters and managers.

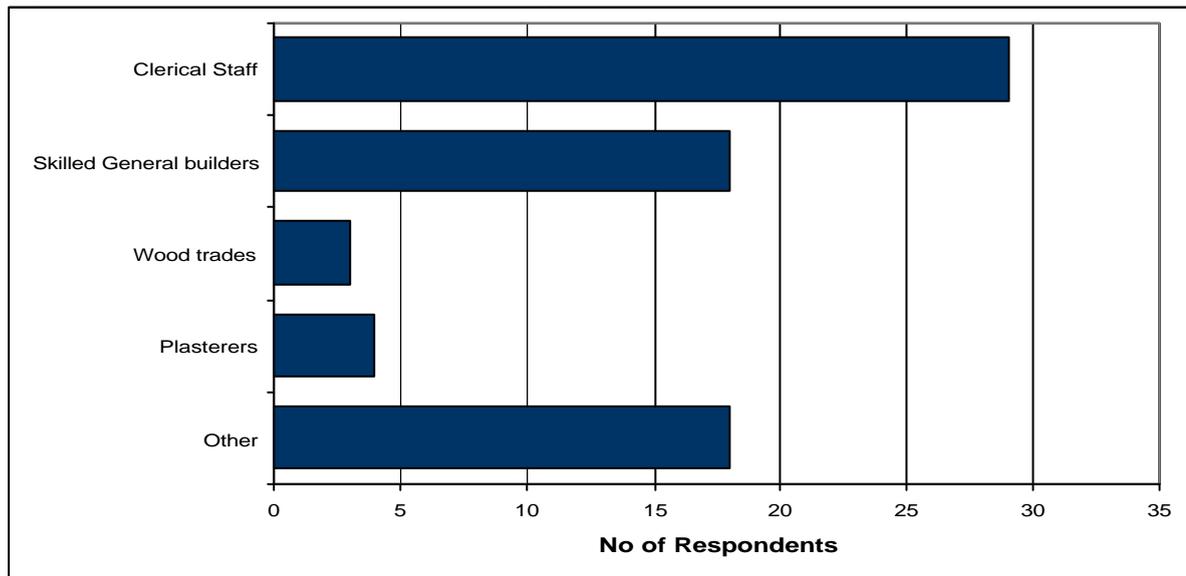
3.16 Those businesses with trainees or apprentices were most likely to employ these in clerical positions, followed by general builders, plasterers and wood trades. There was a wide range of “other” occupations cited here as well.

Figure20 Employment Quotient for All Occupations Employed



Source: Employer Telephone Survey, q.7 Base=101 responses

Figure21 Incidence of Trainees / Apprentices



Source: Employer Telephone Survey, q9 Base=101 responses

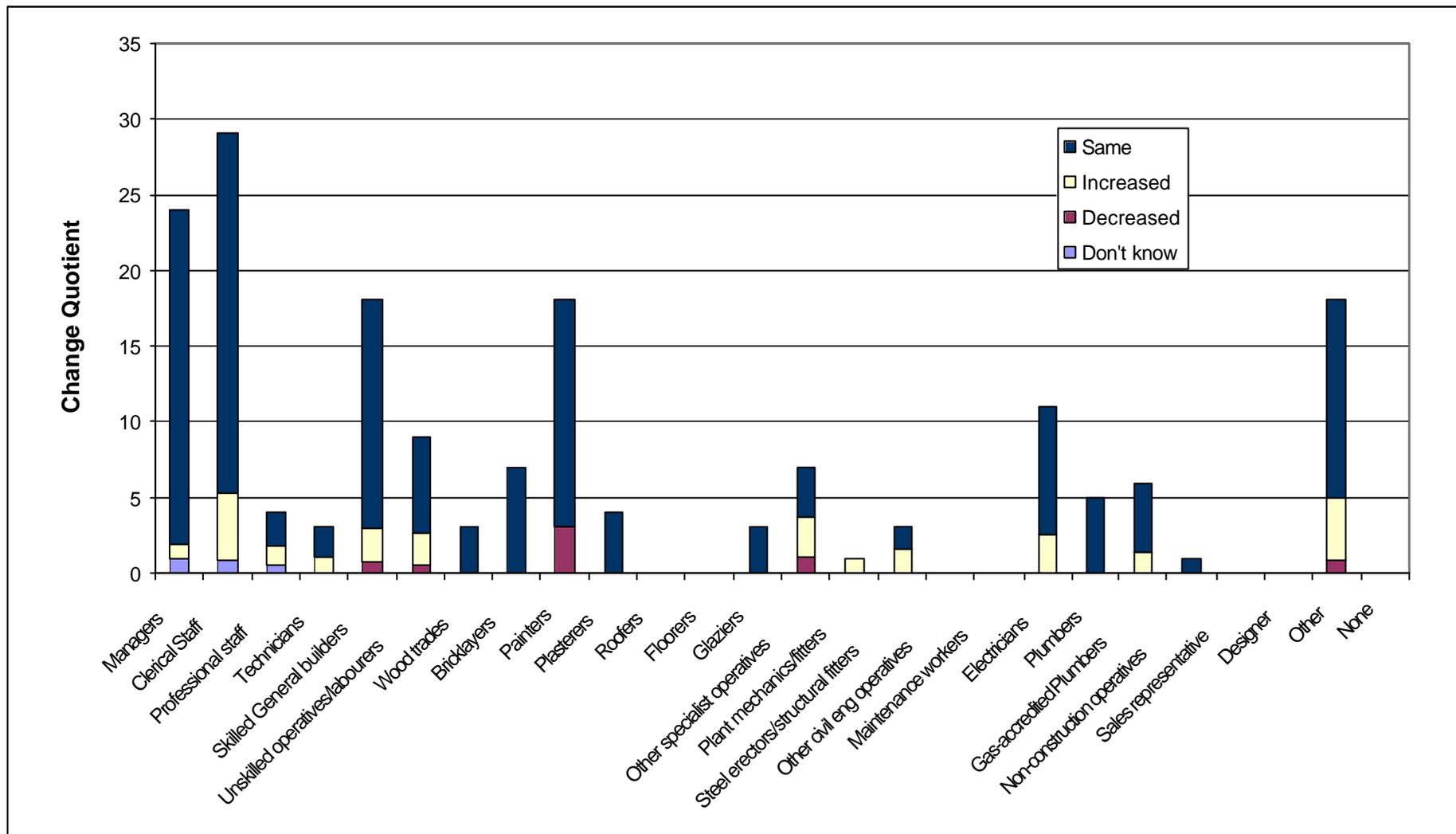
3.17 Employers were asked about occupational change over the last few years in their businesses and also their expectations of change over the next few years. The

majority recorded no changes at all across all occupations. However, where a balance of change was recorded, the main occupations (in descending order) were as below.

Figure 22 Past and Expected Changes in Workforce – by Occupation.

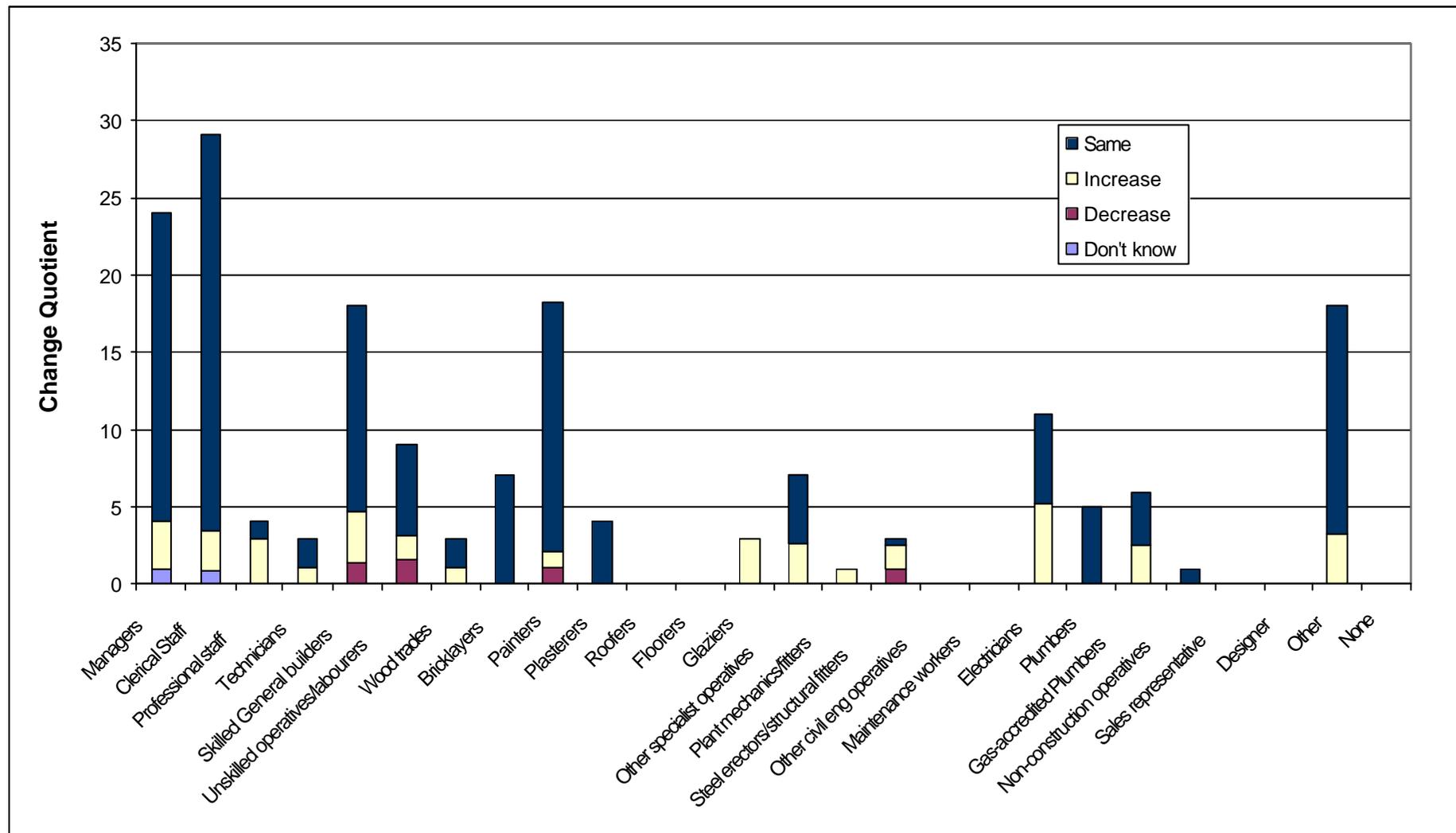
| Employment Change | Recent | Expected |
|--------------------------|--|---|
| Increase | <ul style="list-style-type: none"> • Clerical Staff • Other • Electricians • Unskilled operatives/labourers • Steel erectors/structural fitters • Other specialist operatives • Skilled General builders • Professional staff • Gas-accredited Plumbers • Technicians • Plant mechanics/fitters • Managers | <ul style="list-style-type: none"> • Electricians • Other • Managers • Glaziers • Professional staff • Clerical Staff • Other specialist operatives • Gas-accredited Plumbers • Skilled General builders • Technicians • Wood trades • Plant mechanics/fitters • Steel erectors / structural fitters |
| No Change | <ul style="list-style-type: none"> • Wood trades • Bricklayers • Plasterers • Roofers • Floorers • Glaziers • Other civil eng operatives • Maintenance workers • Plumbers • Non-construction operatives • Sales representative • Designers | <ul style="list-style-type: none"> • Unskilled operatives/labourers • Bricklayers • Painters • Plasterers • Roofers • Floorers • Other civil eng operatives • Maintenance workers • Plumbers • Non-construction operatives • Sales representatives • Designers |
| Decrease | <ul style="list-style-type: none"> • Painters | |

Figure23 Occupational Change Experienced Over the Last Few Years



Source: Employer Telephone Survey, Base=101 responses

Figure24 Expected Change in Occupation Over the Next few Years – Weighted for Number of Cos. Employing Occupation

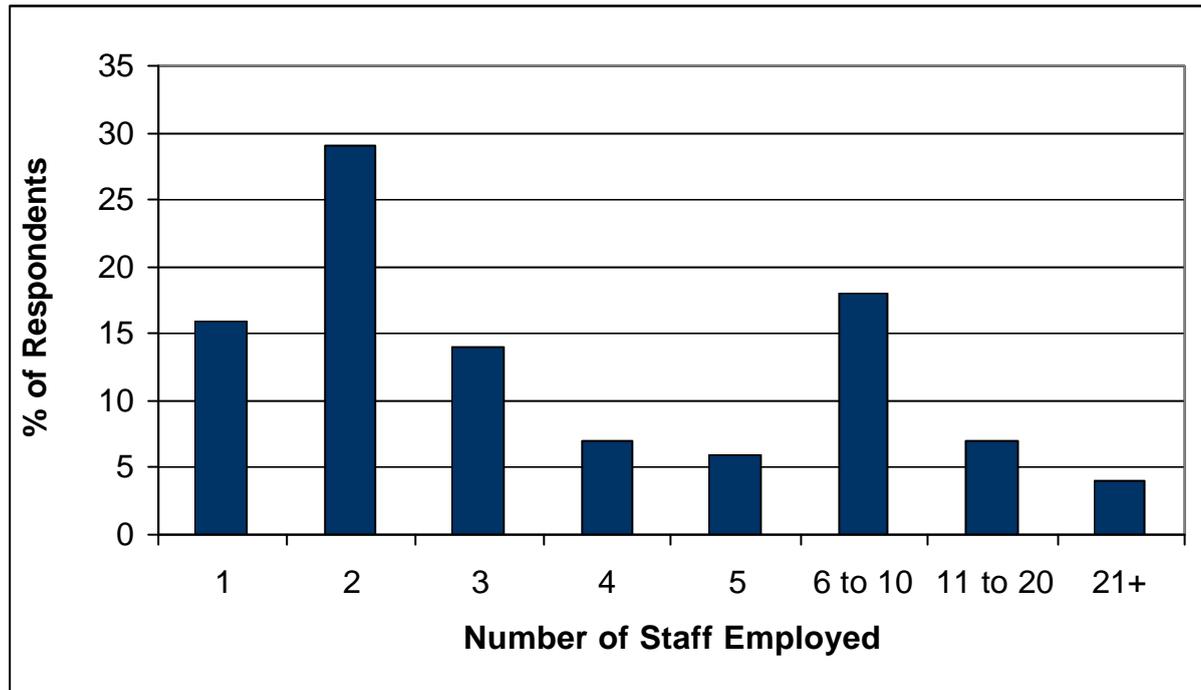


Source: Employer Survey Q11 Base=101 responses

3.18 Fifty-five percent of employers had used some self-employed or contract staff during the past 12 months and larger businesses were very much more likely to have done so.

3.19 The average number of sub-contractors employed was 6 and the most common occupations to be sub-contracted were plumbers, electricians, plasterers and bricklayers.

Figure 25 How Many Self-Employed / Sub-Contract Staff have you Used?

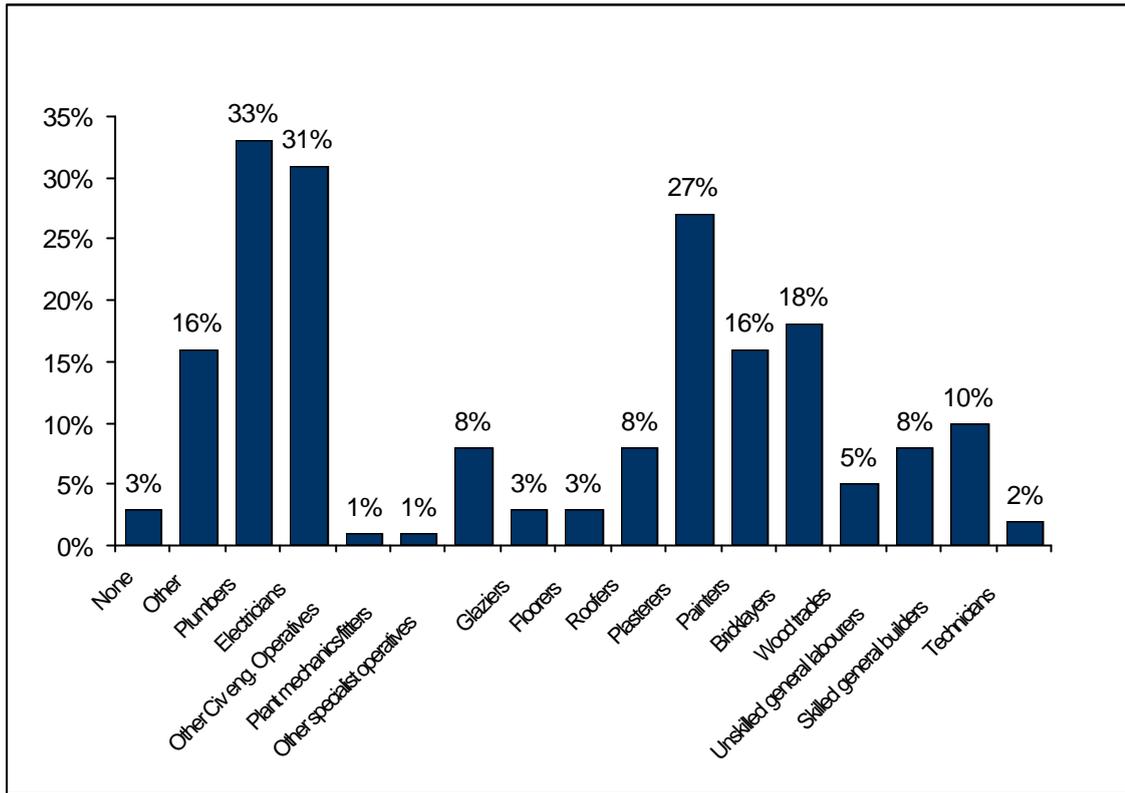


Source: Employer Survey q13 Base=101 responses

3.20 In terms of numbers, unskilled general operatives or labourers were the most common sub-contract employees, followed by technicians, general builders and civil engineering operatives.

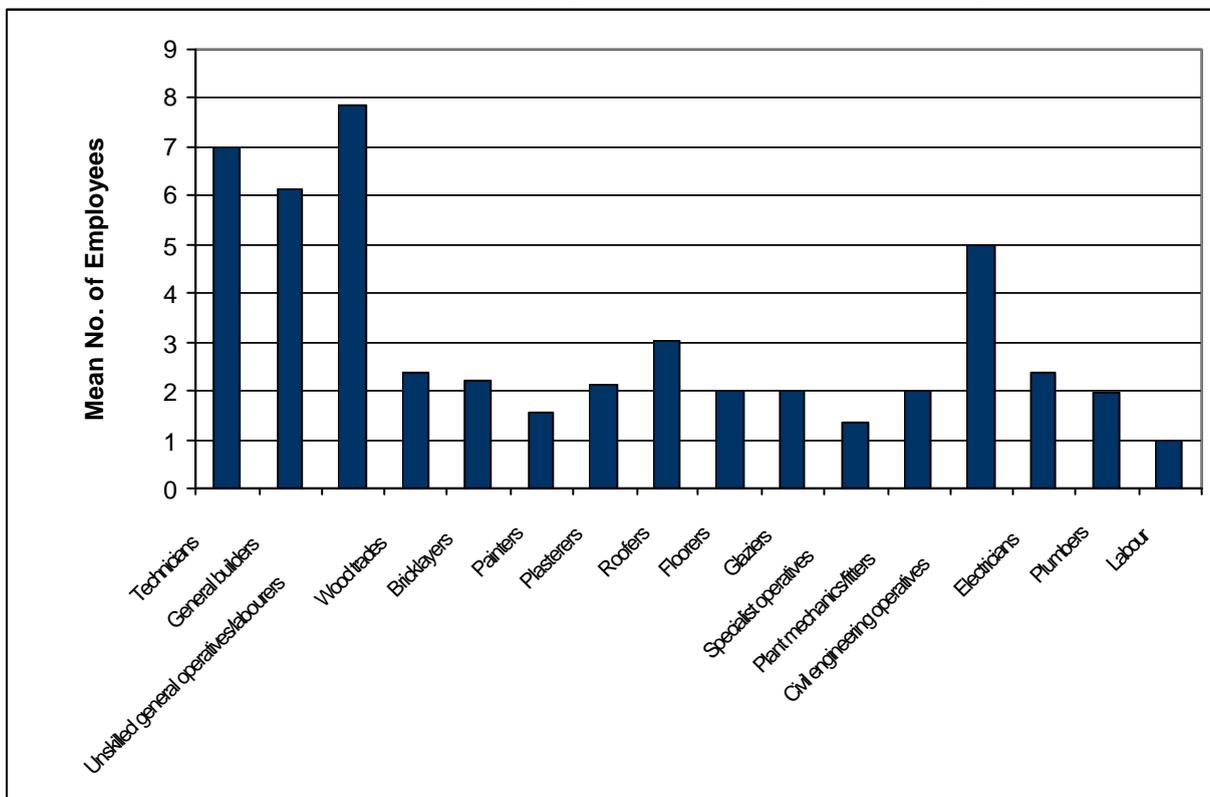
3.21 A balance of 11% of respondents expected to increase their use of sub-contract and self-employed workers during the next year, although the majority expected no change on the current year. (19% increase, 8% decrease, 57% no change).

Figure 26 Self-Employed or Sub-Contract Staff, Occupations Employed



Source: Employer Survey q14 Base=101 responses

Figure 27 Sub-Contract and Self-Employed Labour, by Number Employed



Source: Employer Survey q14 Base=101 responses

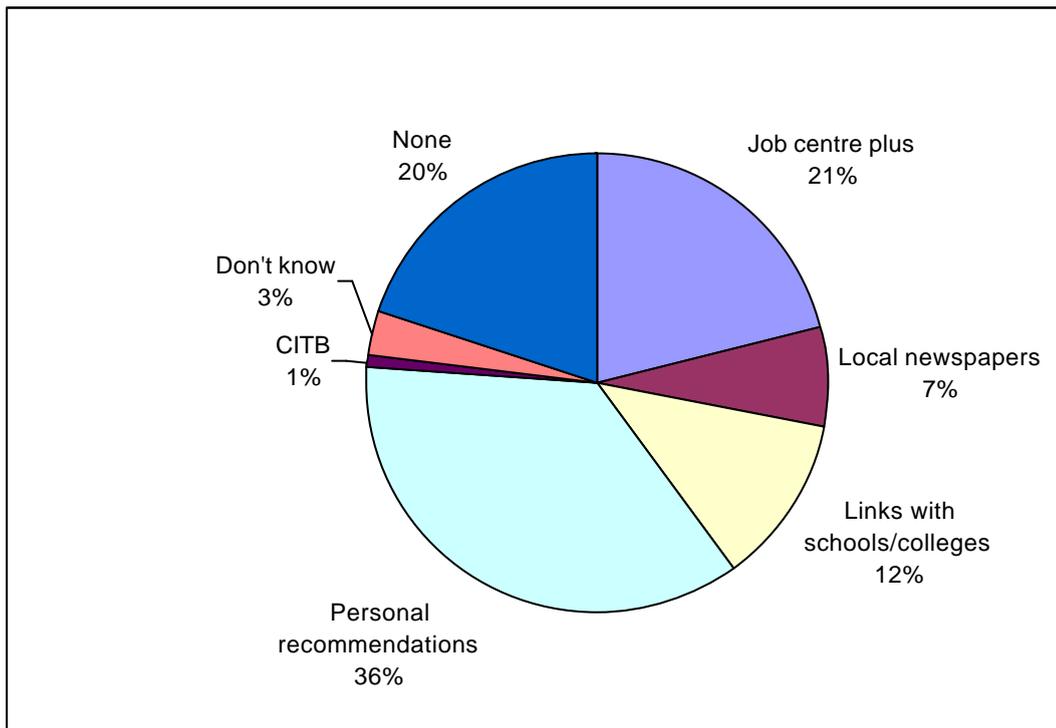
Recruitment, Skills and Training

Recruitment

3.22 Employers were asked a range of questions about their approaches to, and experiences of, recruitment.

3.23 Informal recruitment is very important to employers in Mid Wales – personal recommendation was the most common form of recruitment, used by 36% of those interviewed. JobCentre Plus was used by 21% and direct links with schools and colleges by 12%. Twenty percent did not advertise at all.

Figure28 What Means of Advertising Do You Use to Recruit New Staff?

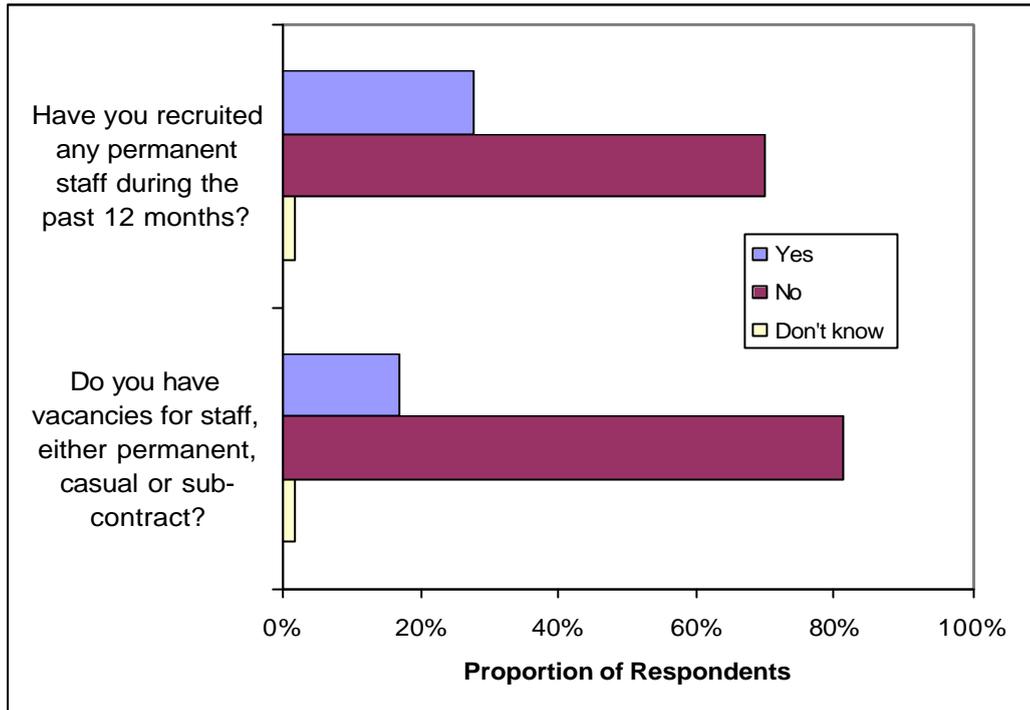


Source: Employer Survey q16 Base=101 responses

3.24 Twenty-eight percent of employers had recruited new permanent employees during the past 12 months and 17% had current vacancies for any type of staff.

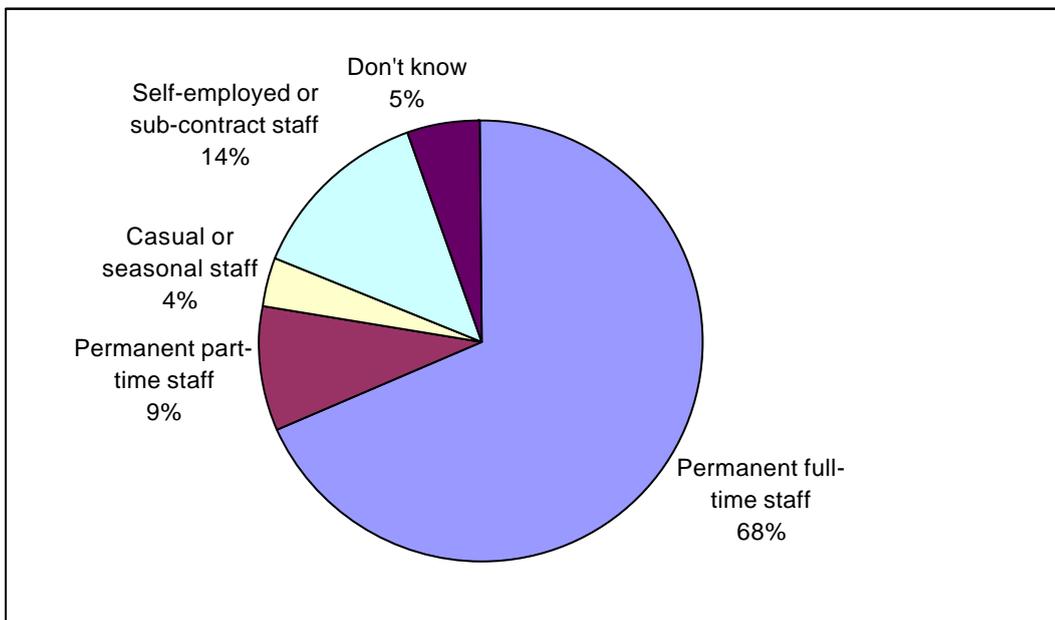
3.25 Twenty-two percent of all employers interviewed said that they had experienced hard to fill vacancies over the last 12 months, two thirds of which were for permanent, full-time staff. Larger firms were more likely to have experienced difficulties than their smaller counterparts.

Figure29 Recent Recruitment and Current Vacancies for Staff?



Source: Employer Survey q17-18. Base=101 responses

Figure30 Hard to Fill Vacancies for Staff by Type

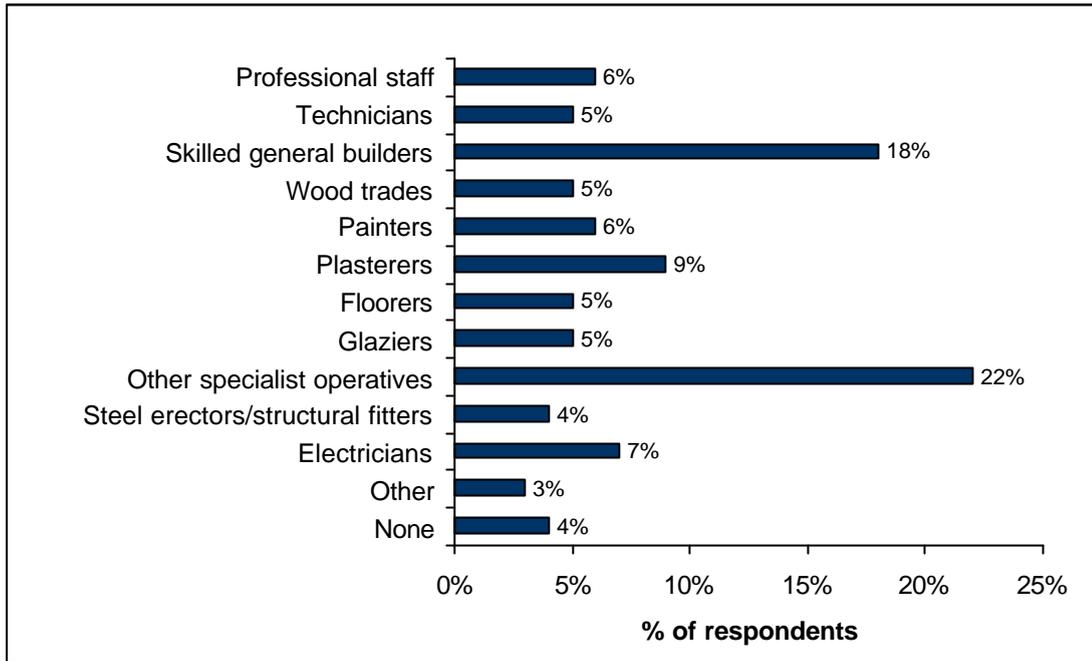


Source: Employer Survey q20. Note: Small sample size - Base=22 responses

3.26 Hard to fill vacancies covered a wide range of skilled occupations, especially “other specialist operatives” and “skilled general builders”.

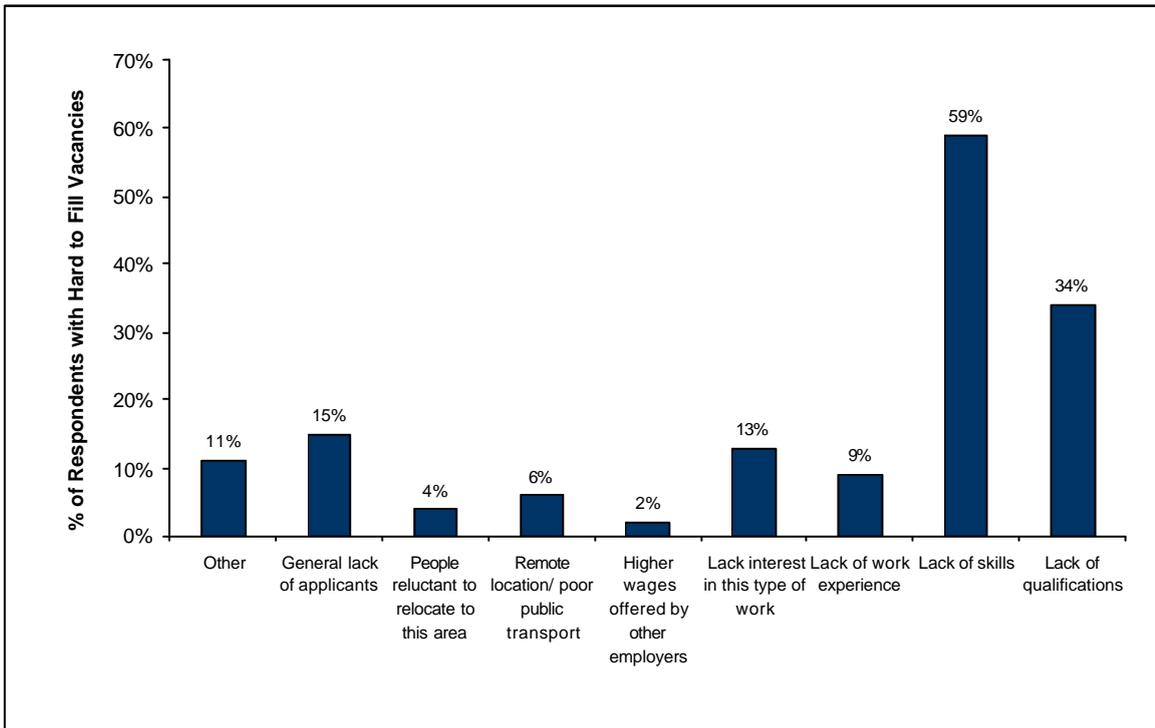
3.27 A significant majority (59%) of those with hard to fill vacancies attributed them to a lack of skilled applicants. A shortage of suitably qualified applicants was also cited by one third of those affected.

Figure31 Hard to Fill Vacancies by Occupation



Source: Employer Survey q21. Note: Small sample size - Base=22 responses

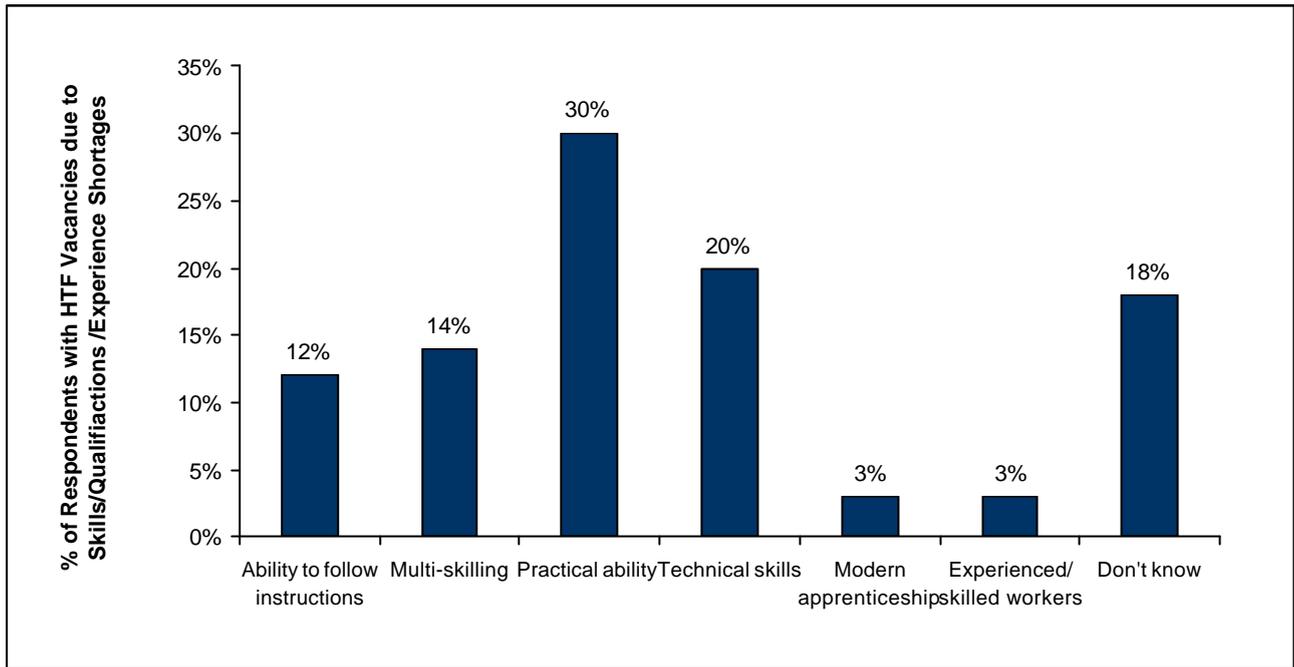
Figure32 Reasons for Hard to Fill Vacancies



Source: Employer Survey q22. Note: Small sample size - Base=22 responses

3.28 When asked which skills were lacking in job applicants, respondents cited practical ability and technical skills as the main areas, followed by multi-skilling abilities.

Figure 33 Skills, Qualifications or Experience Perceived Lacking in Applicant for Hard to Fill Vacancies



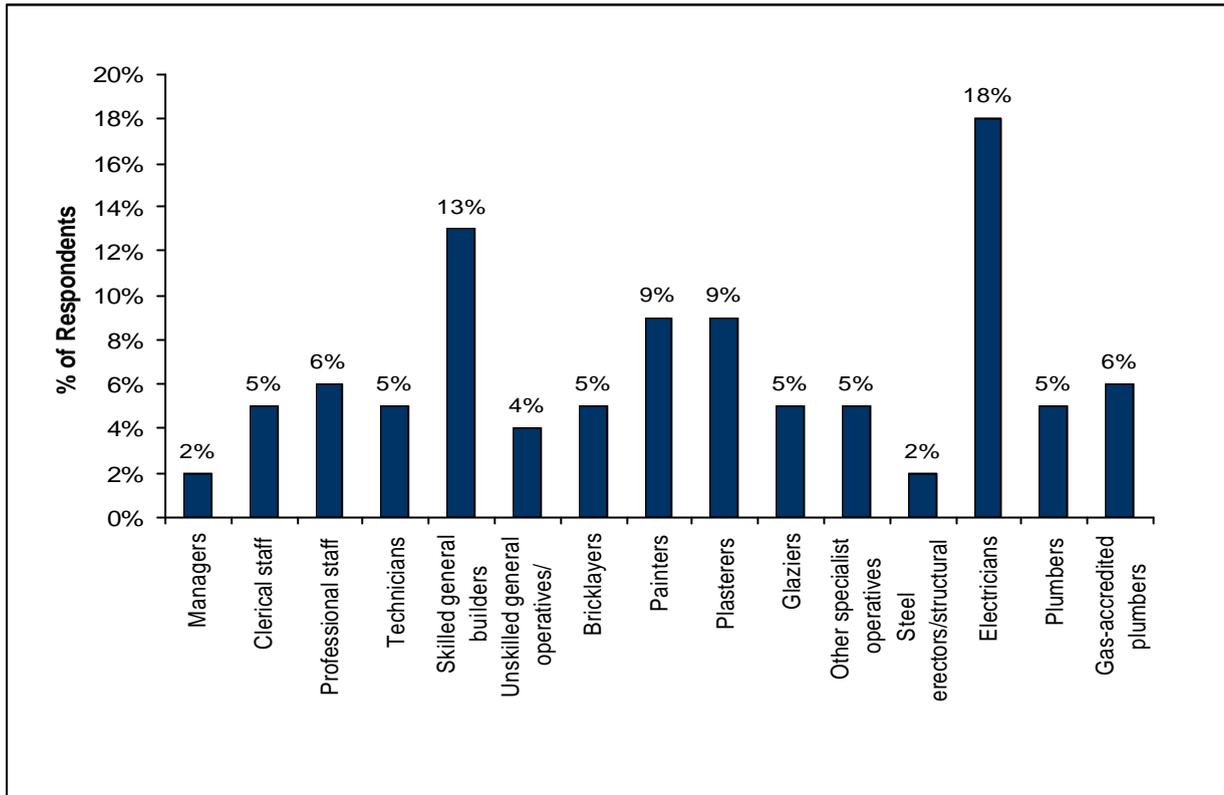
Source: Employer Survey q23. Note: Small sample size - Base= 17 responses

Skills Gaps

3.29 Twenty-two percent of respondents acknowledged a skills gap within their existing workforce – that is current employees lacking the skills necessary to enable the organisation to meet its business requirements.

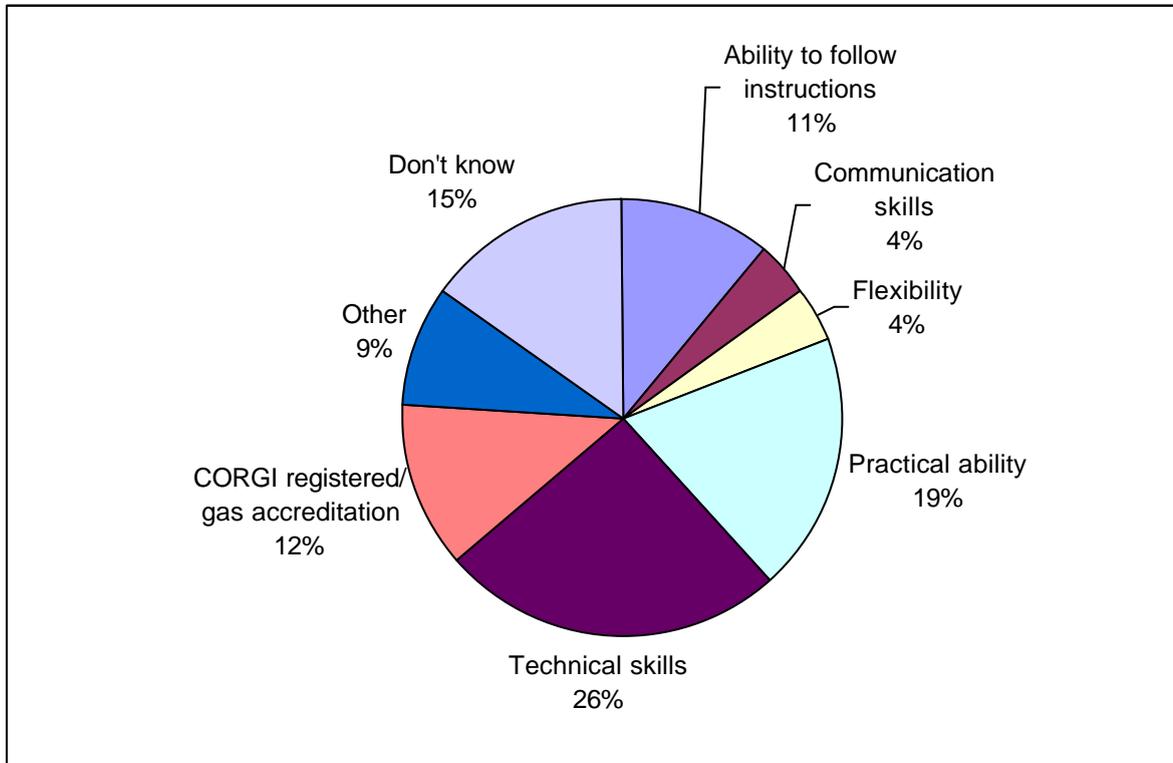
3.30 The main occupation affected was electricians, followed by skilled general builders and to a lesser extent, painters and plasterers. Technical skills and practical ability were again the main areas of concern, followed by CORGI Gas accreditation.

Figure34 In Which Occupations is there a Skills Gap?



Source: Employer Survey q25. Note: Small sample size - Base=22 responses

Figure35 Particular Skills Lacking in Existing Workforce



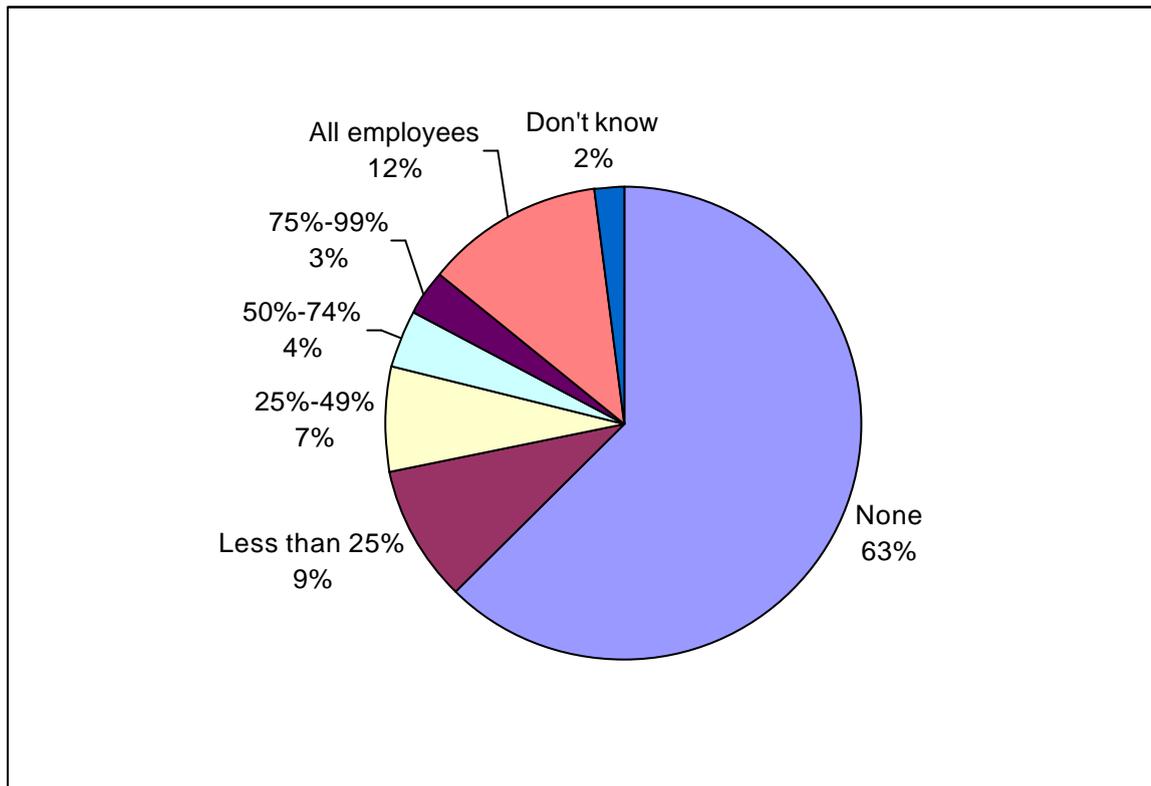
Source: Employer Survey q26. Note: Small sample size - Base=22 responses

Training and Development

3.31 Only 20% of businesses interviewed had a training plan, perhaps reflecting the predominance of small businesses in the region.

3.32 Almost two-thirds of all respondents trained no staff within their organisation last year and only 12% gave training to all employees.

Figure36 Proportion of Employees Involved in Training and Development



Source: Employer Survey q26. Note: Small sample size - Base=101 responses

3.33 Amongst sub-contract and self-employed staff, levels of training were lower: 85% respondents offered no training to this group and only 4% trained all their sub-contract or self-employed staff.

3.34 The balance between use of on-site and off-site approaches to training was fairly even, with some employers adopting a mixed approach to delivery.

Figure37 What type of training did your employees undertake over the past year?

| Type of Training | Percentage of Respondents |
|------------------|---------------------------|
| On-the-job | 57% |
| Off-the-job | 55% |
| Don't know | 5% |

Source: Employer Survey q30. Base=36 responses. Some respondents will have specified a mix of approaches, hence totals exceed 100%.

3.35 Perhaps unsurprisingly, members of staff within the business provided the majority of on-the-job training, whilst external providers accounted for almost three-quarters of off-the-job provision.

Figure38 Who was this training mostly run by?

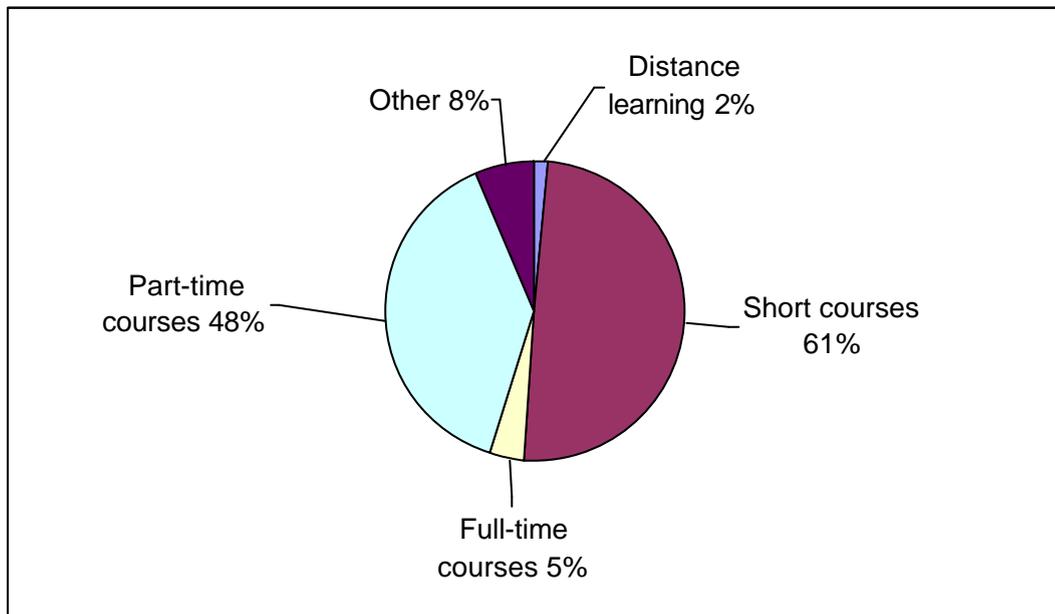
| Type of Provision | Percentage of Respondents | |
|----------------------------|---------------------------|------------|
| | Off the Job | On the Job |
| Member of staff | 17% | 79% |
| External training provider | 72% | 17% |
| Both equally | 11% | 4% |

Source: Employer Survey q31&q34. Base=21/20 responses.

3.36 When asked about the location of external training providers, there was an even split between use of local providers or those based further afield.

3.37 Employers were then asked about the types of courses they had accessed during the last 12 months or so. Short courses were the main type accessed (61% of responses), followed by part-time courses (48%). Very few employers were using distance learning or full-time courses for staff development. This is reflected to some extent by provider data, which shows that learners over the age of 25 tend mainly to engage in part-time courses.

Figure39 What types of training have you accessed during the last 12 months?

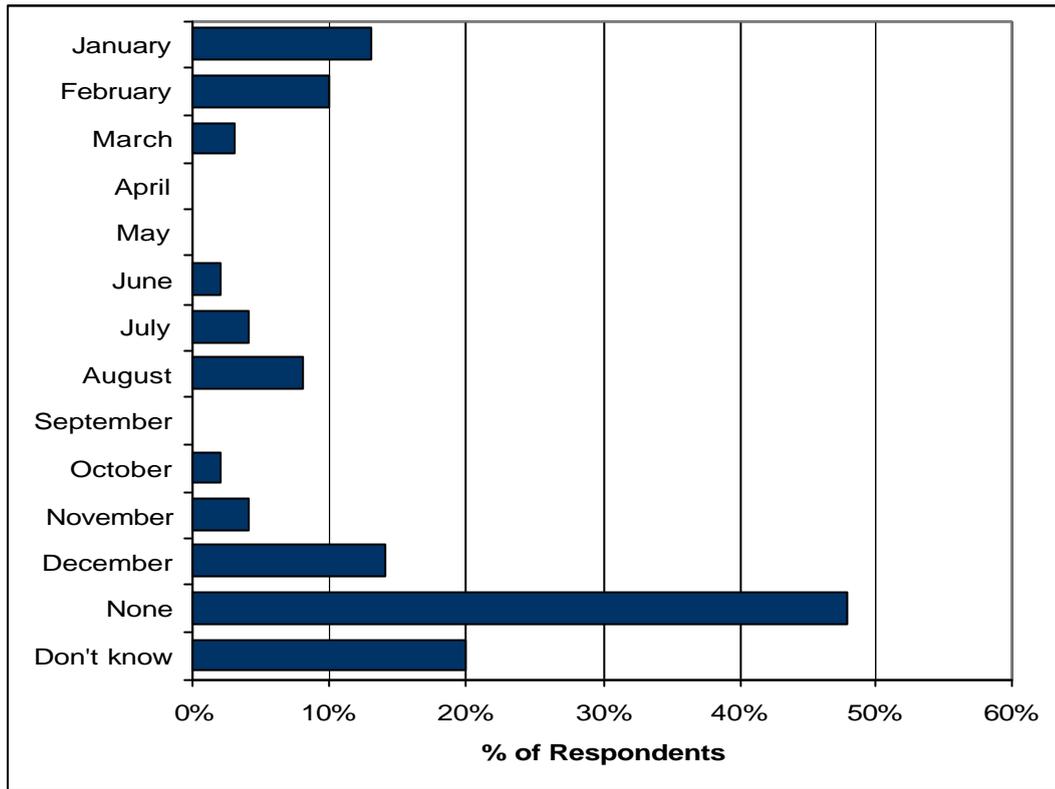


Source: Employer Survey q33. Base=20 responses.

3.38 When asked whether any particular months of the year are particularly convenient for staff training, almost half of those interviewed replied that there is no best time of year.

3.39 Amongst the rest, the winter months of December, January and February were seen as most convenient, followed by the holiday month of August.

Figure 40 What months of the year, if any, are particularly convenient for staff to undertake training?

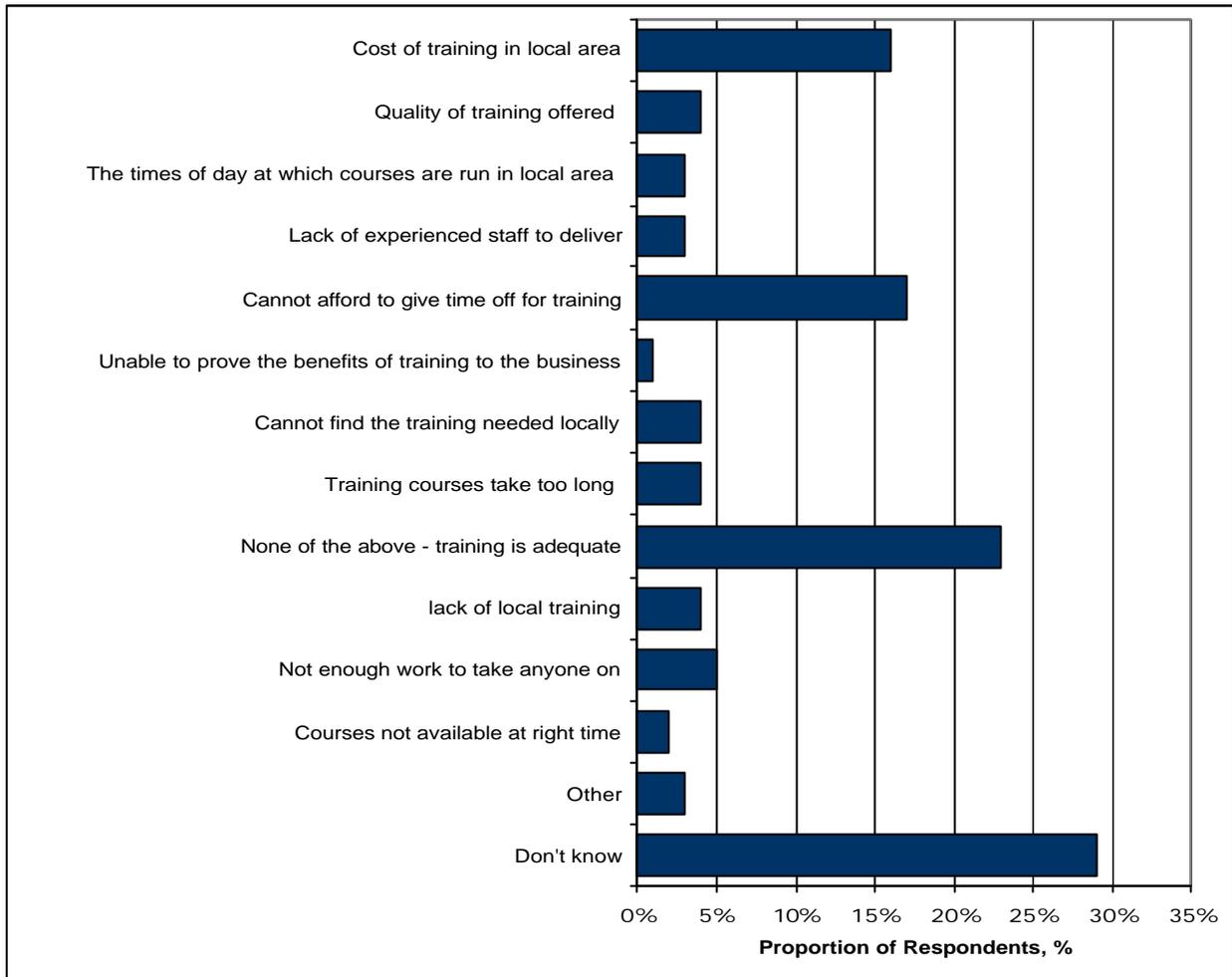


Source: Employer Survey q20. Base=101 responses.

3.40 Employers were asked about factors that created barriers to training in their organisation. Twenty-nine percent of respondents did not know of any barriers, whilst a further 23% felt that there were no barriers, as their training was adequate.

3.41 Amongst those who acknowledged any factors which prevented them training, the main issues were allowing staff time off for training (17%) and the perceived cost of training (16%).

Figure 41 Are there any factors which present a barrier to the amount of training your organisation does?



Source: Employer Survey q20. Base=101 responses.

Awareness of industry qualifications / initiatives

3.42 A series of questions was asked, relating to employers’ awareness of NVQs, CSCS¹², Modern Apprenticeships and OSAT¹³.

3.43 Half of all employers interviewed said that they knew either a great deal or a fair amount about NVQs, although the other half knew little or nothing. Larger employers were no more likely to have knowledge of NVQs than those in smaller firms.

3.44 Forty-one percent of those interviewed knew a fair amount or a great deal about CSCS, although 30% knew nothing about the standard.

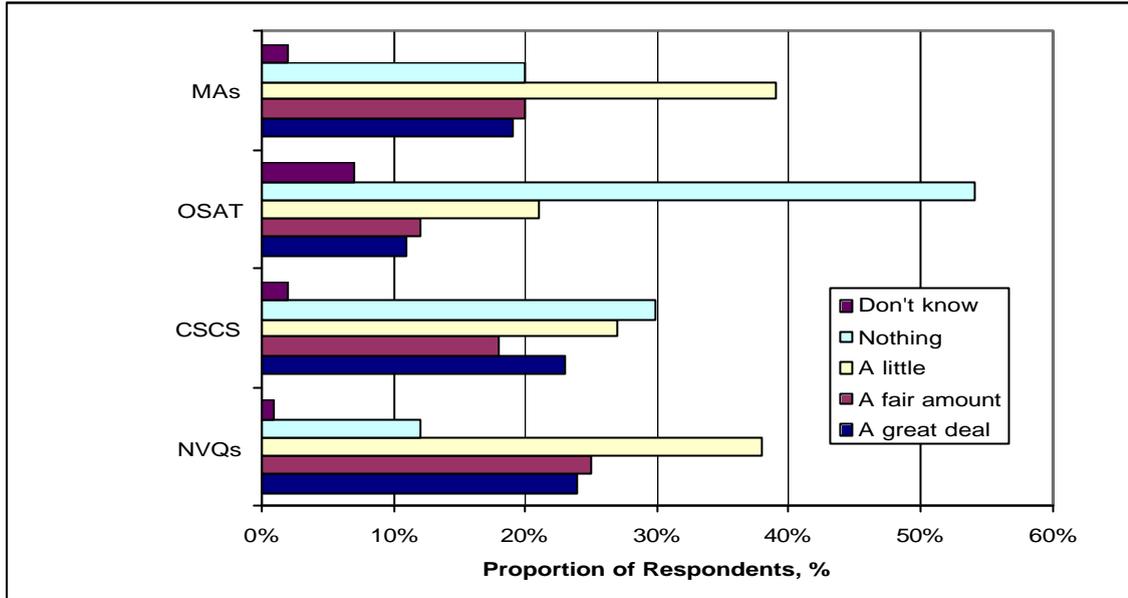
3.45 Less than a quarter of those interviewed felt that they had a good knowledge of OSAT and more than half had no knowledge of it at all.

3.46 With regard to Modern Apprenticeships, almost 40% of those interviewed felt that they knew a little, with a further 40% knowing a fair amount or a great deal.

¹² Certificate of Safety on Construction Sites

¹³ On-Site Assessment and Testing

Figure42 Awareness of industry qualifications / initiatives



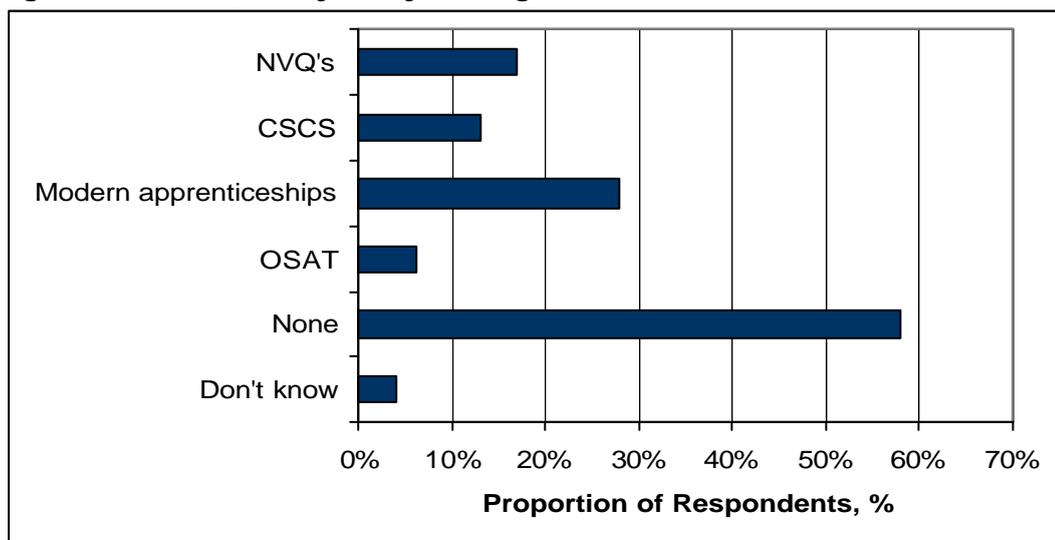
Source: Employer Survey q37. Base=101 responses.

3.47 Almost 30% of employers had used Modern Apprenticeships and the figure was considerably higher (60%) amongst larger employers. A similar picture was presented in relation to NVQs; although only 13% of smaller firms had engaged with NVQs, three-quarters of larger ones said they had.

3.48 The incidence of on site assessment remains low, at 6% of employers overall, and only 13% of larger ones.

3.49 CSCS is clearly beginning to impact on employers – 13% overall had experience of the standard and the differential between large and small employers here was less marked than for NVQs or Modern Apprenticeships.

Figure43 Which, if any has your organisation ever used?



Source: Employer Survey q38. Base=101 responses. Note: Interviewees can offer more than one response, hence totals will add up to more than 100%

Summary

- Beaufort Research Ltd carried out the telephone survey of 101 employers between 6th and 10th November 2003. Interviews achieved represented 5% of all businesses employing 10 or fewer staff and 20% of all those with 11 or more employees across the region.
- Most businesses focused on private sector repair and maintenance and house building, within a localised market.
- Two-thirds are sole traders, with the remainder mainly partnerships. The majority are optimistic about industry performance over the next 12 months.
- Most businesses are small – the average size was 3.8 employees. The main groups employed were skilled general builders (emphasising the need for multi-skilling in the region), clerical staff and electricians. Where employers had taken on trainees, they were most likely to be clerical staff or skilled general builders.
- The occupations perceived to have increased most over recent years were clerical staff, a range of non-specified “other” occupations and electricians. However, the majority had not experienced any change in employment profile.
- More than half of all employers had employed some sub-contract or self-employed staff during the previous 12 months. Most common trades sub-contracted were plumbers, electricians, plasterers and bricklayers. A balance of respondents expected to increase their use of sub-contract labour next year, although 57% expected no change.
- 28% of employers had recruited new staff over the last year and 17% had current vacancies. Word of mouth was the most common means of recruiting, followed by JobCentre Plus.
- 22% of all those interviewed had experienced hard to fill vacancies during the previous 12 months, mainly for skilled general builders and “other specialist operatives”. A lack of skills or qualifications amongst applicants was the main reason for not recruiting and the main skills involved were said to be technical and practical.
- 22% also acknowledged a skills gap in their existing workforce, mainly affecting electricians and skilled general builders. The main skills lacking were again technical and practical.
- Levels of training in the sector were very low: Only 20% of respondents had a training plan and almost two-thirds did not train any staff last year. However, more than half of those interviewed saw no barriers to training or thought existing training was adequate. Amongst those who perceived barriers to training, the main issues were allowing staff time off for training (17%) and the perceived cost of

training (16%).

- Amongst those who did train, there was a fairly even split between use of on and off the job training. Unsurprisingly, off the job training was mainly supplied by external providers, although almost 80% of on-the job training was supported by in-house staff. Short courses were the most popular with employers, followed by part-time learning.

4 Provider Interviews

Introduction and Profile

4.1 In this phase of the research, a range of learning providers was interviewed to access their views on the supply of, and demand for, construction learning across Mid Wales.

Interview Results

4.2 Most of the training providers interviewed have been involved in construction training for a number of years, and colleges are seen as the main providers. Other providers are predominately, but not exclusively, managing agents who sub-contract back to colleges where provision is available.

4.3 Trainee numbers are relatively small in Mid-Wales, and this, combined with the cyclical nature of demand and the relatively high cost of provision can affect the viability of construction courses, especially those of a more specialist nature.

4.4 The choice of courses in the region is relatively limited. Provision ranges from the widely available carpentry and bricklaying courses, to an absence of courses for trainee plasterers, electricians, building maintenance employees or plumbers - although courses in this latter trade are planned for 2004. There is also some provision for trainees in painting and decorating and craft masonry.

4.5 A current upturn in student numbers has justified increased expenditure on construction provision, against a context of inadequate investment in the past.

4.6 The majority of Mid Wales providers serve students within their local authority area - there are very few cross-boundary trainees within Mid Wales, and consequently providers' perceptions regarding competition are formed from a localised standpoint. At this level, most providers are aware of the other organisations operating in the market.

4.7 Competition is not seen so much as being amongst vocational skills providers as being between providers and schools. Some providers are now becoming OSAT (onsite assessment and training) centres, which will result in more workplace based training, taking some of the emphasis off the providers themselves.

4.8 Mid Wales providers face competition from larger providers situated in neighbouring areas who can offer a much wider range of courses. These providers may not see Mid Wales as their target market, but there is significant leakage of learners from the area.

4.9 This is attributable to the availability of courses that are not provided for in Mid Wales, as well as geographic convenience in some cases. However, other possible factors include the existence of more established links with employers or the absence of a language barrier at providers in the surrounding regions.

4.10 There is a perceived issue of possible duplication within Mid-Wales, where providers with geographic overlap have missed opportunities to co-operate. Clearly, in a rural area with limited learner numbers, collaboration is essential if finite resources are to be used to maximum effect in delivering high quality learning and progression opportunities.

Planning

4.11 Planning amongst providers is thought to be based primarily upon the last 3 years' experience or trends. Institutions' organisational plans and employer feedback are seen as being of secondary importance. Careers Wales feedback and findings from other sources such as industry journals play an even lesser role in influencing planning.

4.12 As tends to be the case nationally, planning mostly takes place on a local or county basis, with little apparent co-ordination across the region as a whole. The creation of new facilities in the region, such as the planned plumbing training centre for Ceredigion Training in Aberystwyth, could have a noticeable effect on travel-to-learn patterns both within Mid Wales and in the neighbouring areas.

4.13 Some new provision is being developed, notably in the areas of plumbing, building maintenance, restoration, roofing and sheet cladding.

4.14 The work of CCETs to date has not considered how needs may be met with a regional approach, as opposed to a number of separate, sub-regional strategies. .

Staffing

4.15 Staffing shortages amongst providers are currently regarded as an inconvenience rather than a major issue, though the extent of the problem does vary according to the trade in question.

4.16 For instance, there are concerns about the cost of plumbing trainers – as high as £40 an hour, due to demand. Some providers are concerned that they may have to recruit less experienced tutors if courses are to be staffed. Tutors for carpentry and bricklaying courses, however, are less of a problem. In general, full-time instructors are said to be easier to recruit than part-time ones.

4.17 Enthusiastic staff are understandably valued by providers, as they are seen as key to the success of courses, not least in involving employers in both training and work placements.

4.18 Experience and credibility are seen as paramount when recruiting staff, as these factors are also highly important in dealings with employers.

Employer links

- 4.19 All the providers interviewed claim to have strong institutional links with employers, whilst few felt that effective relationships were in place at a general level, or indeed amongst other individual providers. Some providers have Industry Advisory Boards in place as a mechanism for the industry to communicate its skills and training needs. However, these appear to vary as to their stage of development, and their degree of formality. Coleg Ceredigion has been active in such development.
- 4.20 Providers have regular contact with employers, primarily through their “managing agent” role, although further expected take-up of OSAT is likely to bring about increased contact.
- 4.21 With a view to the increased popularity of OSAT in the future, some providers are looking to develop more work-based assessors. Providers also are endeavouring to reduce the bureaucratic burden for employers, though a certain amount of paperwork is still seen as inescapable.

Providers on Employers

- 4.22 Small firms, whose size renders OSAT more difficult for them, dominate the industry in Mid Wales. A culture of self-employment prevails, and this is seen as one of the principle goals for many learners.
- 4.23 Allied to the tendency towards self-employment is the large number of firms where employment and ownership are “kept in the family.” There is also a preference for employing skilled and experienced workers (in particular multi-skilled ones) rather than unskilled people. One of the reported effects of this preference is an attitude of regarding youngsters as “lackeys” and offering them relatively poor rates of pay.
- 4.24 Plumbing and electrical firms are reported to be larger in size, more favourable to becoming “professionals” in their field (possibly in response to legislative requirements) and therefore more likely to undergo vocational and upskilling training.
- 4.25 There is widespread demand for the core “biblical” trades of carpentry and bricklaying throughout Mid Wales, as across the rest of the UK.
- 4.26 Certain aspects of the NVQ system can be a barrier to participation, with technical frameworks and the lack of basic skills of NVQ holders often cited as drawbacks. The parties identified as key drivers of training in the sector are insurance companies and industry regulators.
- 4.27 As regards the provision of training within the industry, the CITB represents an important commissioner of short courses. However, some employers are unaware of the assistance available to them in the form of CITB grants and fear paying levies for courses.

4.28 The industry has become more buoyant over the last few years, though there is a suspicion that this bubble has been fuelled on the whole, by Objective 1 funding. Also, that the wellbeing of the sector depends largely on the level of house building being maintained.

Providers on Learners

4.29 The image of jobs in the sector is reported to have improved in general, with craft trades perceived as paying particularly well. Additional attractions include the fact that construction-related employment can be found at a local level, along with the job security provided by the fact that work is unlikely to be outsourced to foreign countries or done by computers.

4.30 The image of the typical construction sector employee has improved to an extent, yet it is still regarded in some areas as being the domain of poorly educated, chauvinistic white males.

4.31 It appears that young people are interested in construction, as many courses are oversubscribed, with particularly strong demand for plumbing, painting and decorating and carpentry courses. However, despite this enthusiasm, course completion rates are reported to be relatively low, possibly due to unattractive frameworks for pre-NVQ and NVQ Level 1 students, due to the need to incorporate Key Skills. Training which is combined with work placements is more likely to retain learners until the completion of their course.

4.32 Some providers see block release as more effective than day release, as it allows greater momentum to be achieved in delivery. However, logistical issues such as accommodation, distance from providers and employers' reluctance to spare staff for block release may prevent this from being more widely adopted in Mid Wales.

4.33 Many young people entering construction courses have weak basic skills, such as communication, which have become more of an issue for employers during the past few years, especially in terms of achieving the technical frameworks.

4.34 Few young learners see themselves returning to learn any skills when they are older, but are more likely to feel that they have done their training once they achieve a primary qualification.

4.35 Older workers in the sector may be seen as "experienced" but many lack formal qualifications and a large proportion of them fail to realise the financial benefits that these could bring. The Construction Skills Certification Scheme (CSCS) also suffers from a lack of profile amongst workers, who may be unaware of the projects they miss out on through not being part of the scheme.

The Future

4.36 Mid Wales offers an opportunity for better regional planning amongst providers, both public and private. However, given the geo-demographic profile of the area, one solution would be the establishment of small, locally-based skills and training centres to enable and support more work-based training and learning.

4.37 Concerning the demand for employment in certain occupations - the level of supervisory training is likely to increase if more regulatory measures are introduced to the sector, whilst the current demand for plumbing courses is expected to tail off as income levels stabilise

4.38 The implementation of the credit framework for learning would have a number of potential benefits:

- Firstly, retention of learners until completion could be improved, as their enthusiasm would be maintained as they accumulate credits.
- A credit system would help make existing short courses more attractive and provide opportunities for training or upskilling for older employees in the industry.
- Similarly, a credit-based approach would encourage multi skilling, and the furthering of existing skill sets.
- As the key drivers of change start to take effect, qualifications, rather than training will start to gain in importance, adding to the attractiveness of a credit system to existing workers.
- Funding for providers could perhaps be re-assessed and awarded according to provider inputs, rather than the achievements of the students.

4.39 In the future, the growth of OSAT will mean that assessment could become as significant as training provision itself.

Summary

- Twelve training providers across Mid Wales and neighbouring areas were interviewed, to gain their perspectives on training issues in construction.
- The majority of provision in Mid Wales is delivered by FE Colleges – other providers are mainly managing agents and sub-contract back to colleges.
- There are significant difficulties in providing viable courses for the relatively small numbers of trainees in Mid Wales, particularly in relation to more specialist areas of the industry.
- This contributes to a relatively limited range of courses being available in areas such as plastering, gas courses, building maintenance and plumbing.
- Within the Mid Wales region, informal agreements between providers have led to providers delivering only to students from within their local area, however some students access courses outside the Mid Wales region for specific subject areas,

travelling to Pembrokeshire College, SCAT (Shrewsbury), Coleg Menai and others.

- Planning amongst providers is currently based primarily on the last three years' experience or trends, supplemented by institutional plans and employer feedback. There is little evidence of a regional approach to planning at present and this may be reinforced by the organisation of CCETs at a Unitary Authority, rather than regional or sectoral level.
- Some new provision is currently under development, in response to rising demand in areas such as plumbing, building maintenance, restoration and roofing.
- Relationships with employers can be difficult as a result of the small average business size and lack of critical mass within small firms for hosting work experience or for releasing staff for training.
- In addition, smaller firms outside the scope of Construction Skills may be reluctant to access advice or guidance, for fear of being drawn into paying the industry levy.
- Plumbing and electrical firms are perceived to take a more "professional" line on training, in part driven by the impact of legislation in their sub-sectors.
- The technical frameworks around NVQs can be a barrier to participation – especially where students with low basic skills abilities are concerned.
- Providers feel that the image of a career in construction has improved in recent years, with young people recognising the value of relatively well paid employment available in their local area. However, course completion rates are said to remain relatively low – possibly due to unattractive frameworks.
- Older workers are felt to be reluctant to undertake any learning, or to achieve accreditation for existing skills.
- Providers agree that the implementation of the credit framework for learning would have a number of benefits in terms of recruitment and retention of learners.

5 Provider Workshop – Highlights

Introduction

5.1 The provider workshop session, attended by representatives of the majority of Welsh providers for Mid Wales construction learners, offered an opportunity to discuss issues around course provision and the potential for collaboration.

Course design and provision

5.2 There is considerable reticence amongst providers regarding the creation of new courses or specialising in certain aspects of construction, because of the risk of unviability. Also, the cost of establishing construction courses is greater than in many other vocational areas and the potential market may be smaller for these providers.

5.3 The need to be risk averse counteracts the potential benefits of providers becoming more proactive and innovative in tailoring their provision for local needs. A partnership approach between providers and/or employers could possibly help in this respect, by spreading the investment risk. However, the provision of risk-based funding, such as the previously available LIF¹⁴ funding, would certainly be of benefit to providers.

5.4 The ability of providers to recruit high quality trainers, something which is seen as crucial in determining the viability of a course, is often curtailed by the limited supply of affordable, qualified staff. A possible solution to this, which links to improving networking in the region, would be a system of sharing instructors or some other form of collaboration. This may become more feasible as provision in the region moves away from a college-based approach towards OSAT.

5.5 There is a feeling amongst providers that the current NVQ system does little to equip trainees with the relevant basic skills required to work in the industry, and neglects the provision of the management and entrepreneurial skills required to support self-employment or to nurture any potential construction managers. This latter point holds particular importance, as senior employees are held in higher regard if they have come up “through the trade” rather than having a purely academic background. By giving them the necessary skills along with this respect, providers will help increase the effectiveness of the trainee, should they be promoted.

5.6 Another area where provision could be improved is that of giving multi-skilling training. The nature of the industry in Mid Wales means that employees in most companies will be needed to multi-task and will need at least a grounding in the whole range of core construction skills.

¹⁴ Local Initiative Funding

Work Placements

5.7 There is a particular issue around securing relevant, quality work placements for Work Based Learning learners. One approach that has been successful in Carmarthenshire, for example, has been to identify and target a large role-model employer and build a core of firms willing to train learners around that company. However, given the predominance of small firms in Mid Wales, identifying such a large firm might be difficult. An alternative would be to create a series of networks of small, committed firms at local level, who would need support but also be able to support each other.

Relationships with Employers

5.8 Communication between employers and providers and amongst providers themselves is something which providers feel needs to be improved. Currently, there is very little in terms of regular, organised networking within the sector in Mid Wales.

5.9 CITB has previously developed close links with larger employers and Construction Skills will now carry on this work. This work needs to be further developed to meet the needs of a rural area. There may be scope to coordinate local networks into regional tiers thereby ensuring small and micro sized businesses are included in activities. This would ensure that best practices can be shared across regions, potentially reversing the leakage of skills which is currently being witnessed in Mid Wales. Increased communication with employers will also increase their awareness and possibly the uptake of the training and grants available to them.

5.10 It is felt amongst providers, that although there is leakage of learners from Mid Wales to the surrounding regions, the level is not as high as might be expected, which might suggest that the potential skills base of the area may not be being realised at present.

5.11 Within the region, there is currently very little migration of learners, though this could change if certain centres were earmarked for specialist provision within the region.

Case Study 1 Carmarthenshire Training Group

The Carmarthenshire Training Group consists of an expanding group of employers supported by Coleg Sir Gar. A CITB grant of £25,000 enabled the group to become established and to build a critical mass of employers.

The group jointly buys in training courses according to the needs of members and allows short and specialist provision to be accessed in a cost effective manner.

Construction Skills consider that the approach has been very successful in building more of a learning culture amongst construction firms in the area.

A nucleus of committed employers is considered to be an essential prerequisite for

developing a successful group. However, once established, the group approach can be extremely effective at drawing other firms into learning.

Coleg Sir Gar has worked closely with the group and has provided a range of additional provision in response to requests from members.

The Training Group approach has been run successfully elsewhere in Wales and presents a potential way forward for providers in Mid Wales to engage with construction employers in the region.

Learning Demand

5.12 Legislation is perceived as being the key driver towards ensuring a fully qualified workforce. The plumbing and electrical trades, with their greater emphasis on qualified personnel, are held up as good examples of legislation having led to increased levels of training. Overall, it is felt that the need for employees to be formally qualified will probably increase in the coming years and providers will need to respond in line with increased demand.

5.13 The fact that most construction work in Mid Wales involves small projects means that a lot of workers can continue in the industry without formal qualifications. Also, subcontracting, which is widespread in Mid Wales, can pass on the responsibility for training down the supply chain. This may be an area where stricter regulations, for example in the form of public sector procurement policies can increase the take-up of training.

Summary

- The provider workshop session offered an opportunity to discuss issues around course provision and the potential for collaboration
- There is considerable reticence amongst providers to deliver new courses or those specialising in specialist aspects of construction, because of the risk of non-viability.
- It is recognised that a partnership approach could help to spread the investment risk.
- Providers were not sure whether sufficient high quality tutors could be recruited to deliver extended provision – it was suggested that a network of shared staff could be developed.
- The current NVQ framework was criticised for neglecting management, entrepreneurial and multi-skilling content
- Discussion was held around the difficulties of securing quality work experience placements amongst small employers. It was suggested that a network of employers could be formed and encouraged to adopt a proactive approach to

offering placements and having trainees move amongst employers so that the trainee achieves their full volume of work placement time.

- These networks could be further developed to become training groups – jointly buying in customised training to meet the needs of members.
- Finally, it was recognised that legislation is likely to remain the key driver for training and that providers have an opportunity to plan around the legislative requirements.

6 Current Learning Provision in Construction Serving Mid Wales

Current Provision of Training and Support

Training Provision

- 6.1 There are currently 20 FE colleges offering construction related courses in Wales and in 2000-2001 an estimated 3,000 students enrolled on formal construction training courses in Wales.
- 6.2 Wales has 35 CITB recognised NVQ assessment centres, of which three are in Mid Wales (Coleg Powys, Coleg Ceredigion and Ceredigion Training), along with five supervisory and management colleges,
- 6.3 Onsite assessment and training has grown significantly since 2000 and is expected to become the main strand in delivering qualifications to the workforce. However, the industry believes that awareness and take-up of it could be raised further still. Currently, of the nine accredited Welsh onsite assessment and training (OSAT) centres, none are located in Mid Wales.
- 6.4 The CITB also runs specialist courses, such as tower crane operation, at its National Construction College, which has a campus in Birmingham. This centre caters for training that could not otherwise be provided cost-effectively in individual colleges and it can also run tailor-made courses at customers' premises.
- 6.5 In addition there are specialist providers, such as Ty-Mawr Lime and y Faenol – providing guidance and training on a number of traditional and ecological building techniques.
- 6.6 Ty-Mawr Lime currently runs a range of courses at its premises in the Brecon Beacons National Park:
- Introduction to Lime
 - Lime Plastering Day
 - Natural Paints/Finishes Day
 - Natural Building Technology Day
 - Sheep's Wool Thermal Insulation Information Seminar
 - Health and Buildings Seminar
- 6.7 At school level, Mid Wales has seen a growth in the popularity of vocational construction courses and work experience, such as after school activities and Saturday clubs. For example, Ceredigion Training have run local artisans' clubs for pupils at age 10, to introduce them to basic concepts and activities. (Although this activity has been put on hold due to funding issues.)
- 6.8 Other moves such as the creation of the civil engineering challenge, run in the region to encourage A-level students to pursue construction-related degrees and to include

construction related-subjects at Key Stages 3 and 4 have helped to improve students' perceptions of a career in the industry.

Work-Based Learning Review

6.9 In November 2003, ELWa announced a wholesale review of its work-based training programmes, in an attempt to make learning more responsive to the needs of Welsh employers.

6.10 The review will include an audit of the content and delivery of skills-based programmes such as Modern Apprenticeships and is likely to lead to changes in both.

Further Education and Work-Based Learning Provision in Built Environment

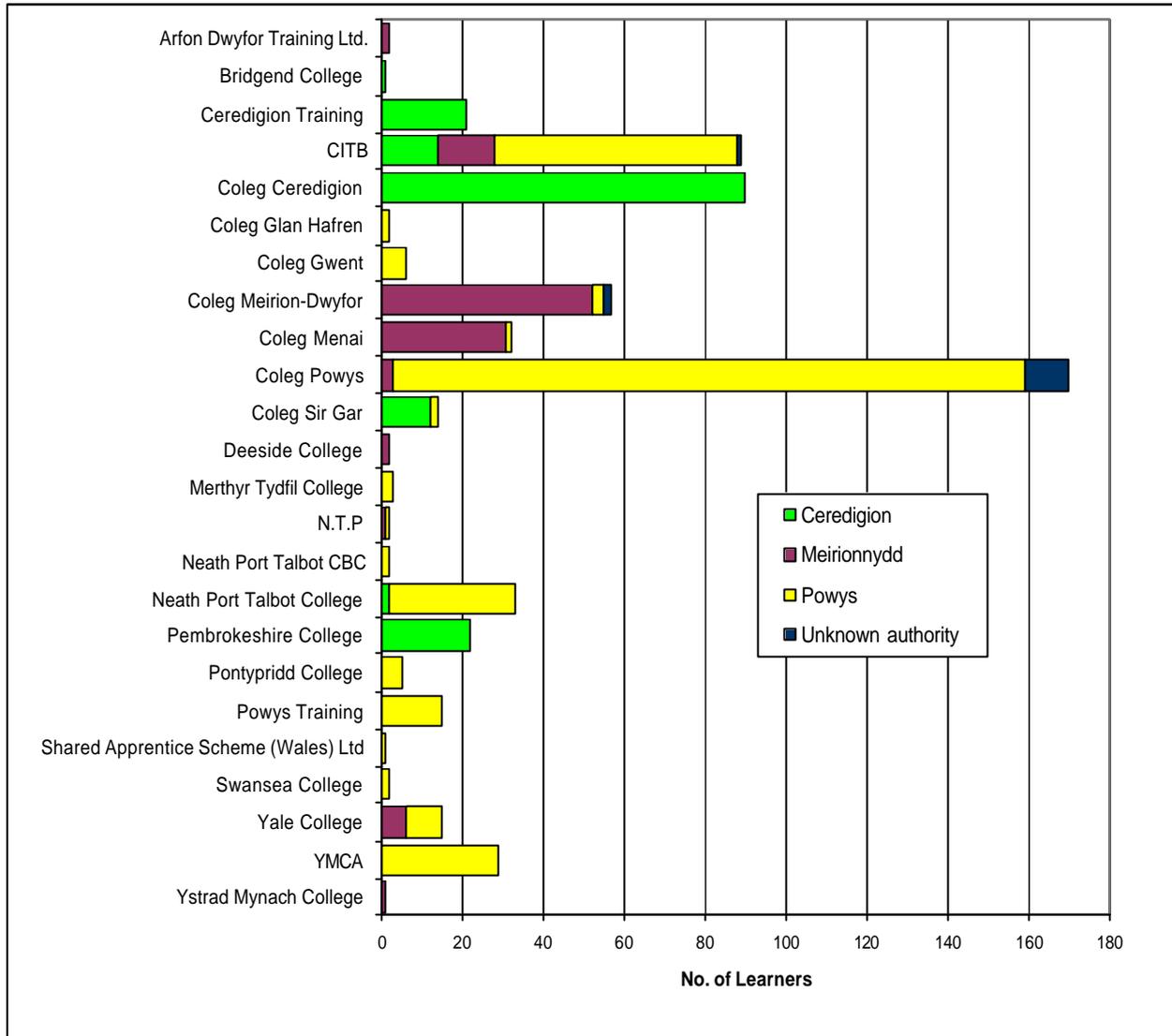
6.11 Data is available from ELWa to show the learning destinations of Mid Wales residents engaged in FE and Work Based learning within the built environment programme area.

6.12 The data below shows a total of 24 relevant providers, providing to some 580 learners. However, the majority of private training providers act as managing agents, sub-contracting provision to the statutory sector.

6.13 Geographically, providers within Mid Wales can be seen to be catering almost exclusively for learners from their respective Unitary Authority areas, whilst those outside provide for learners from adjacent local authorities.

6.14 Hence, Pembrokeshire College and Coleg Sir Gar have students from Ceredigion, whilst Neath Port Talbot College, Yale, Coleg Gwent and others provide for Powys students. In the North, Meirionnydd students attend Coleg Meirion Dwyfor, but also Coleg Menai and Yale. CITB acts as managing agent across all areas. Data is not available for students accessing courses outside Wales at sites such as Hereford, Chester or Shrewsbury.

Figure44 Core Funded Built Environment Learning, Mid Wales Residents

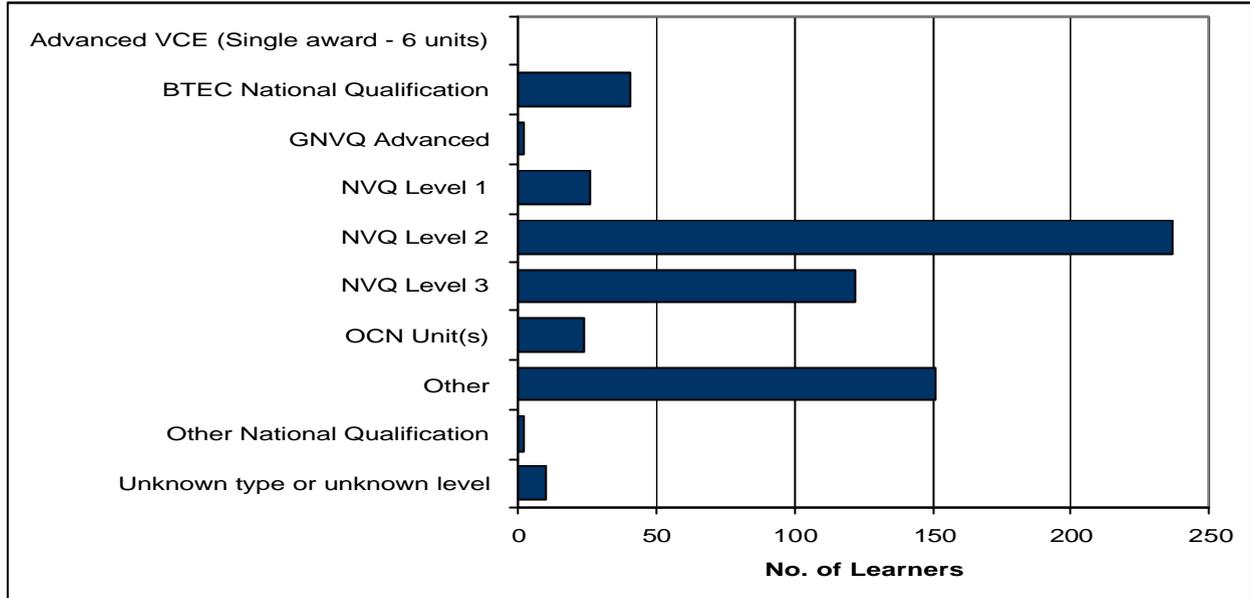


Source: ELWa. 2003. Relates to 2000 / 2001 academic year.

6.15 The main qualifications delivered are NVQs at levels 2 and 3, although there is a significant tranche of “Other” qualifications, which unfortunately cannot be further disaggregated at present.¹⁵

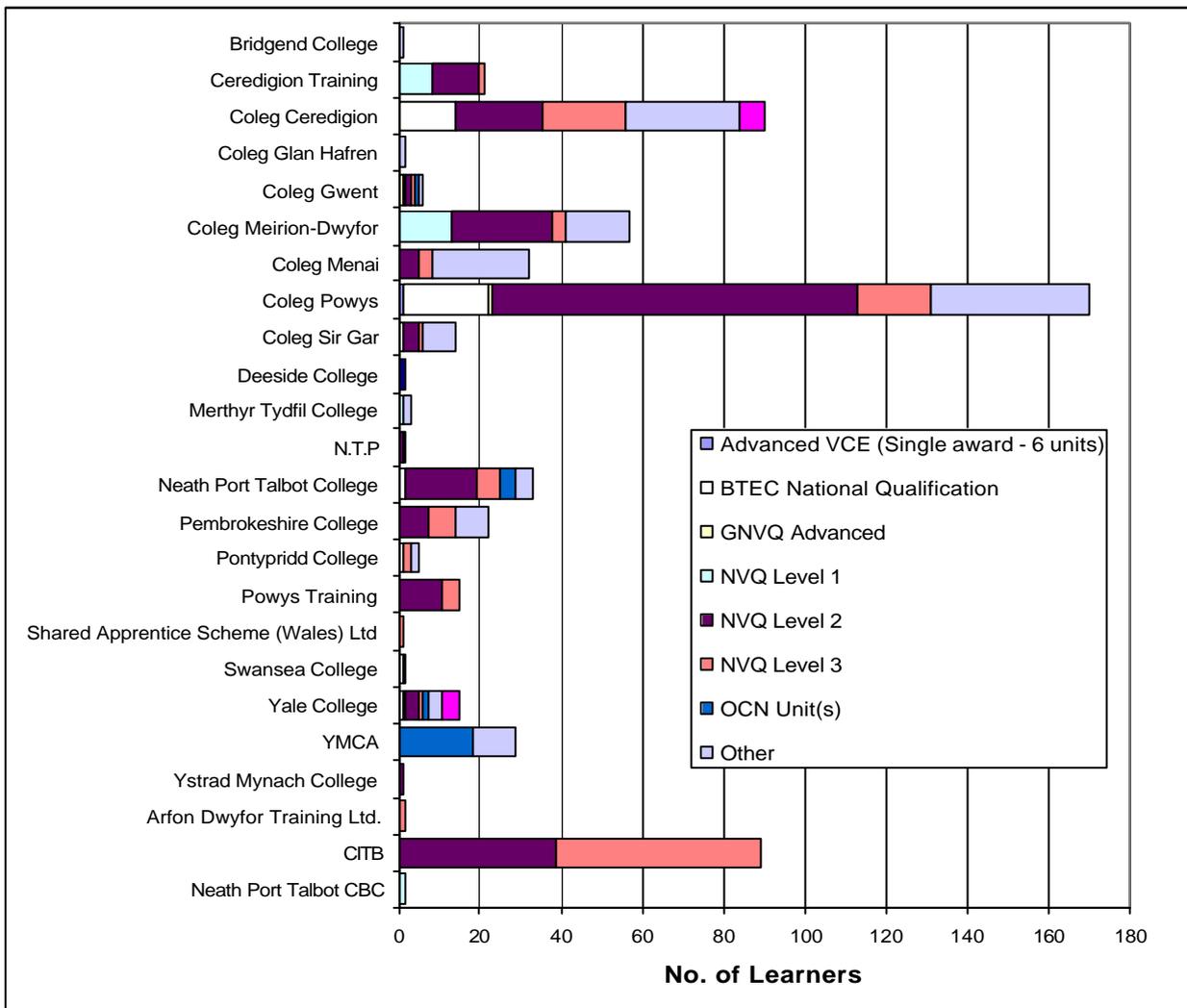
¹⁵ We requested DAS to further investigate the breakdown of courses by qualification aim, but unfortunately, further detail could not be provided.

Figure45 Built Environment Learning by Qualification Area



Source: ELWa. 2003. Relates to 2000 / 2001 academic year.

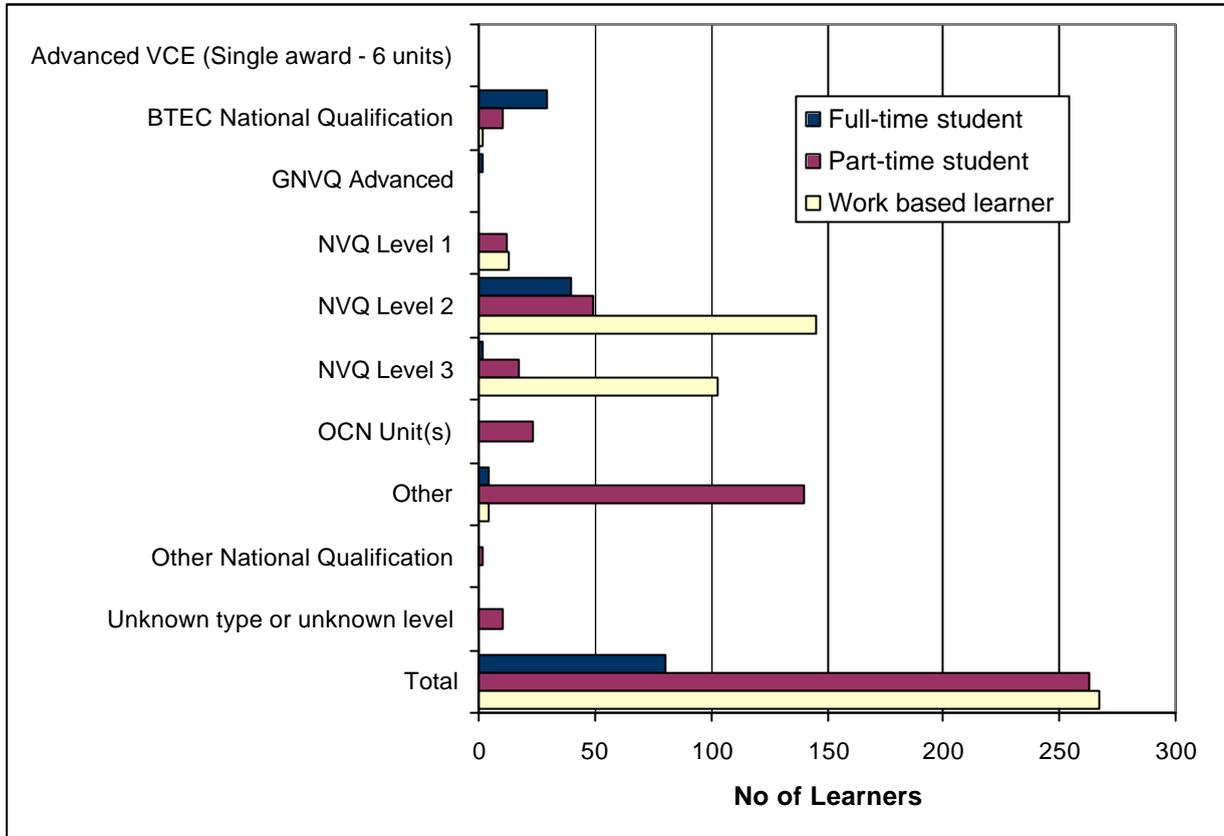
Figure46 Built Environment Learning by Qualification Area & Provider



Source: ELWa. 2003. Relates to 2000 / 2001 academic year.

6.16 The majority of NVQs are delivered to work-based learners, although there are some full and part-time students, especially at Level 2.

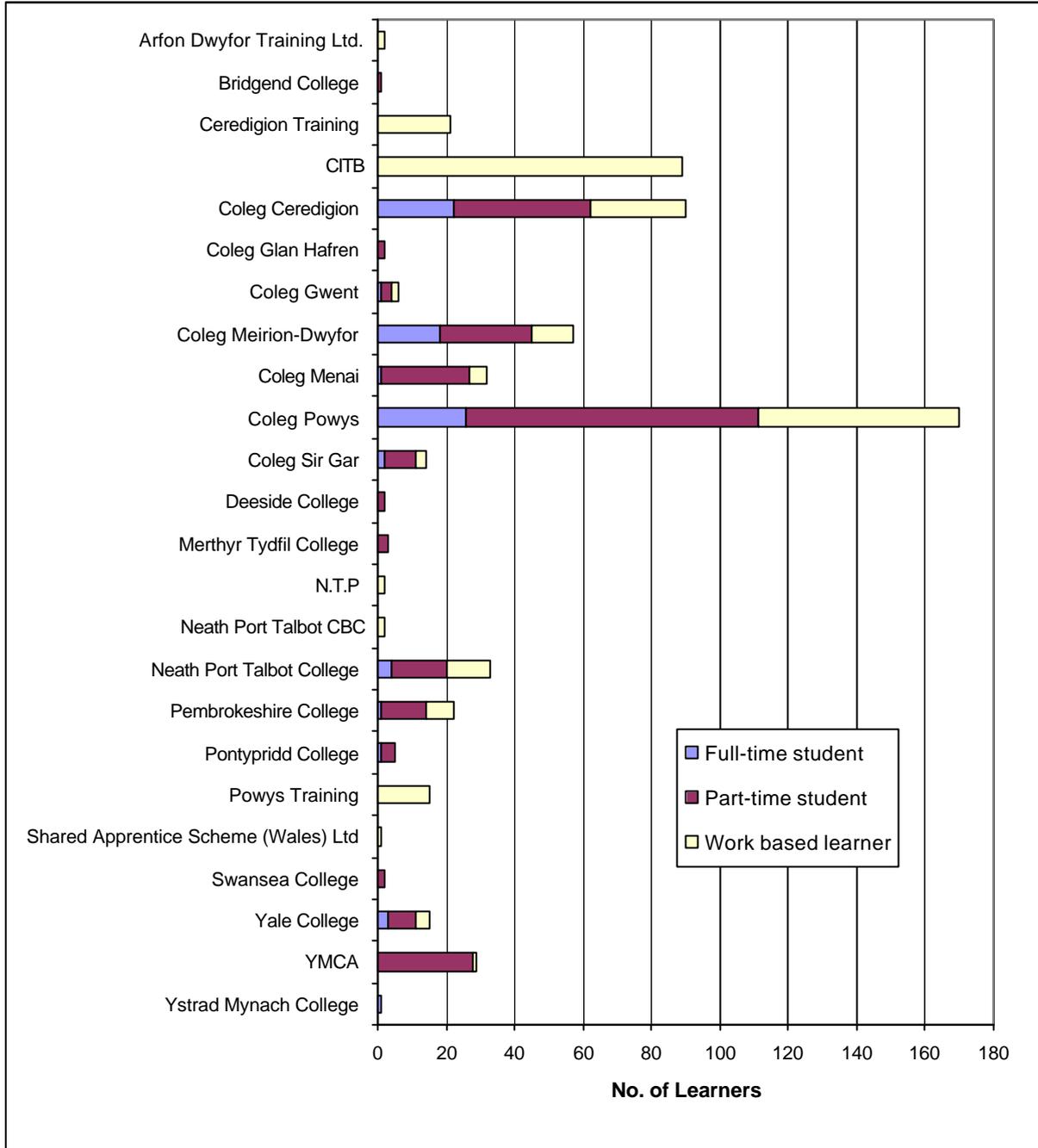
Figure 47 Built Environment Learning by Mode of Attendance



Source: ELWa. 2003. Relates to 2000 / 2001 academic year.

6.17 As might be expected, private training providers manage exclusively work-based learners, whilst FEIs provide for more equal proportions of work-based, part-time and full-time students.

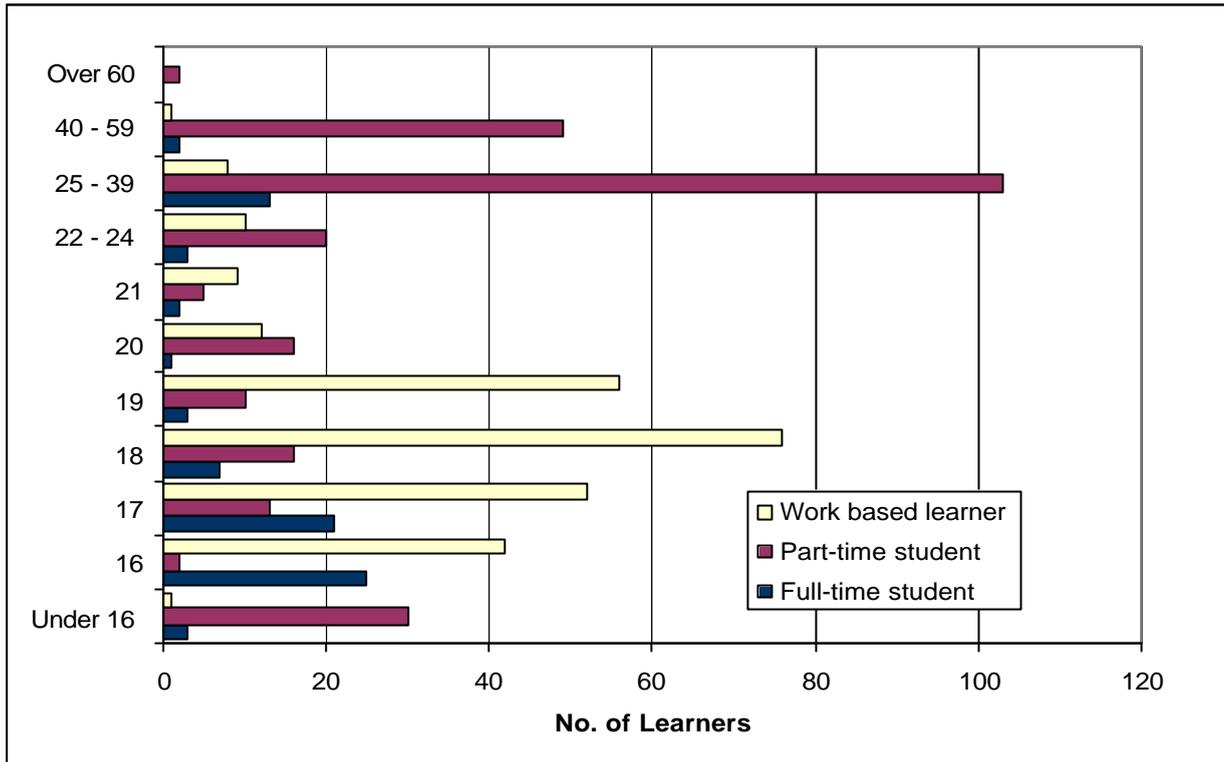
Figure48 Built Environment Learning by Mode of Attendance and Provider



Source: ELWa. 2003. Relates to 2000 / 2001 academic year.

6.18 In terms of age profile, the majority of work-based learners and full-time students were in the 16-19 group, whilst part-time students were more likely to be older, especially in the 25-39 age band.

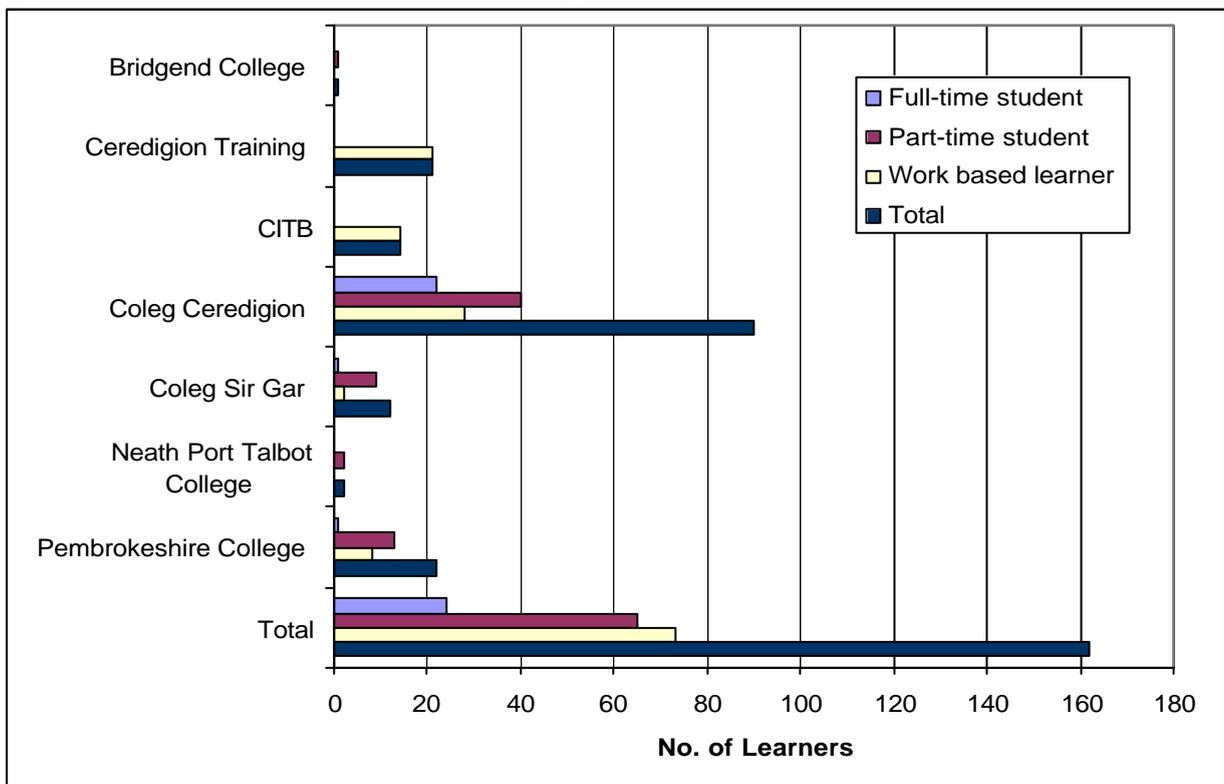
Figure49 Mode of Attendance vs. Age of Learner



Source: ELWa. 2003. Relates to 2000 / 2001 academic year.

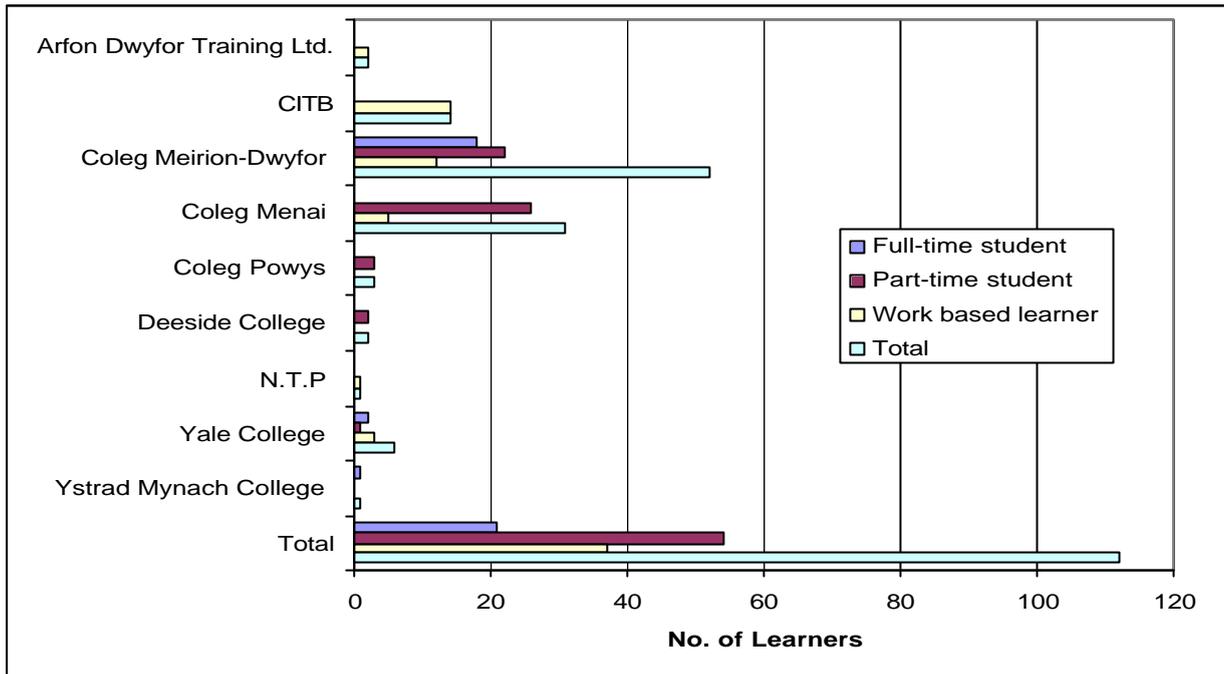
6.19 The following charts detail the mode of attendance and providers used by residents of Powys, Ceredigion and Meirionnydd.

Figure50 Mode of Attendance - Ceredigion Residents



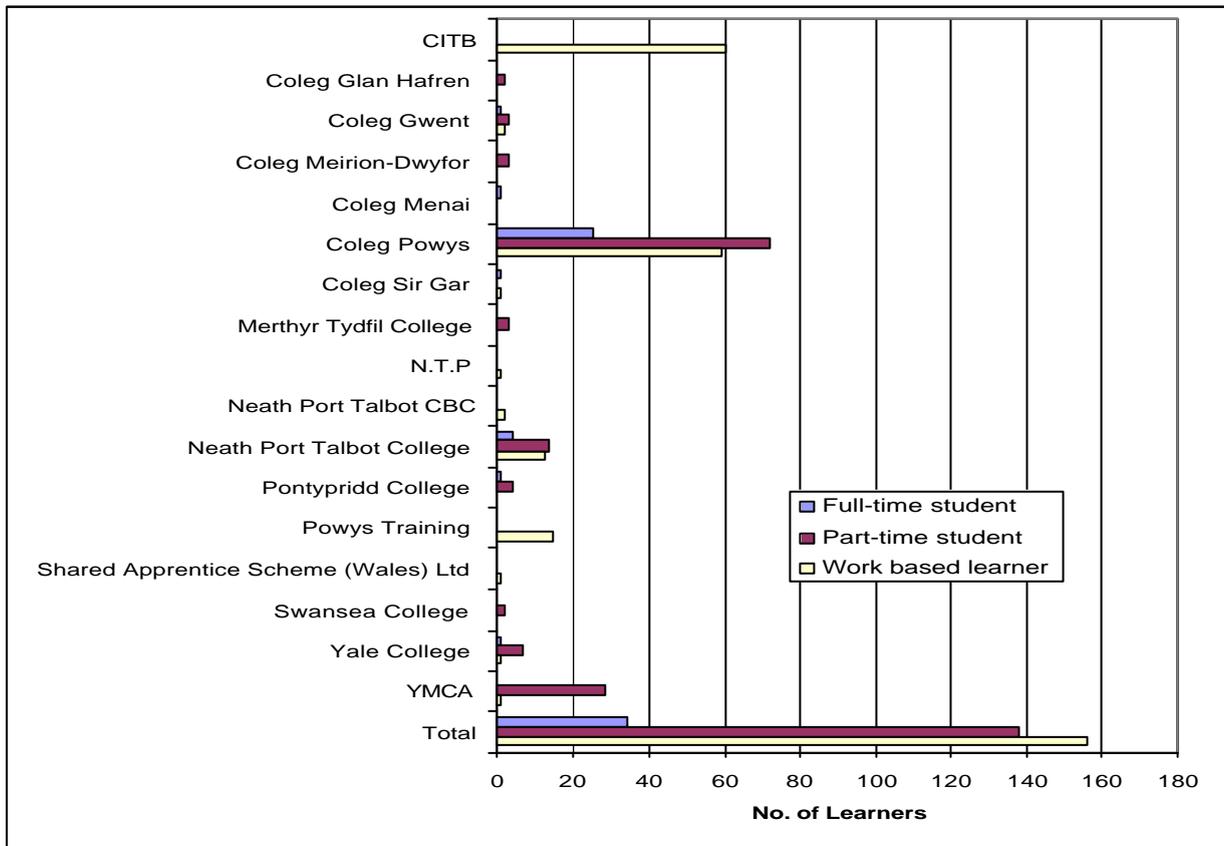
Source: ELWa. 2003. Relates to 2000 / 2001 academic year.

Figure51 Mode of Attendance - Meirionnydd Residents



Source: ELWa. 2003. Relates to 2000 / 2001 academic year.

Figure52 Mode of Attendance - Powys Residents



Source: ELWa. 2003. Relates to 2000 / 2001 academic year.

Duplication and Gaps in Construction Provision in Mid Wales

6.20 Figure 66 in Appendix 1 shows the overall range of qualifications available through Mid Wales providers and a selection of those in neighbouring areas.

6.21 There is limited duplication in provision within Mid Wales at present, although in some areas private training providers offer WBL provision, sub-contracted back to the FE sector, for example:

- Both Coleg Ceredigion and Ceredigion Training offer NVQs in wood trades (although Ceredigion Training sub-contracts to Coleg Ceredigion).
- Powys Training offers an NVQ 2 in wood occupations (construction), sub-contracted to Coleg Powys, Hereford College of Technology (HCT), NPT College (NPTC) or Shrewsbury College of Art and Technology (SCAT). They also offer brickwork / trowel occupations, sub-contracted to Coleg Powys or NPTC

6.22 In addition, there is parallel provision in neighbouring Unitary Authority areas, although learner data shows that there is little cross border travel to learn within the region. For example, Coleg Powys and Coleg Ceredigion have provision in common in core construction trades, such as bricklaying, trowel occupations and wood trades and the BTEC National Diploma in construction.

6.23 The planned plumbing training centre for Ceredigion Training in Aberystwyth will offer training that is likely to be duplicated by planned provision in plumbing at Coleg Ceredigion.

6.24 There are some significant gaps in relation to:

- Painting and decorating – currently available in Mid Wales only at Coleg Powys
- Plastering – which is reported to draw students from the North of the region to Coleg Menai
- Gas courses – Not available in Mid Wales. Provision at SCAT.
- Stonemasonry – Not available in Mid Wales. Provision at Coleg Menai.
- Building studies – Not available in Mid Wales. BTEC HNC/HND and Foundation Degree available at Coleg Menai.
- Bench joinery – Basic C&G available at Coleg Powys. NVQ 1-3 at HCT.

Higher Education Supply and Demand for Construction Related Provision

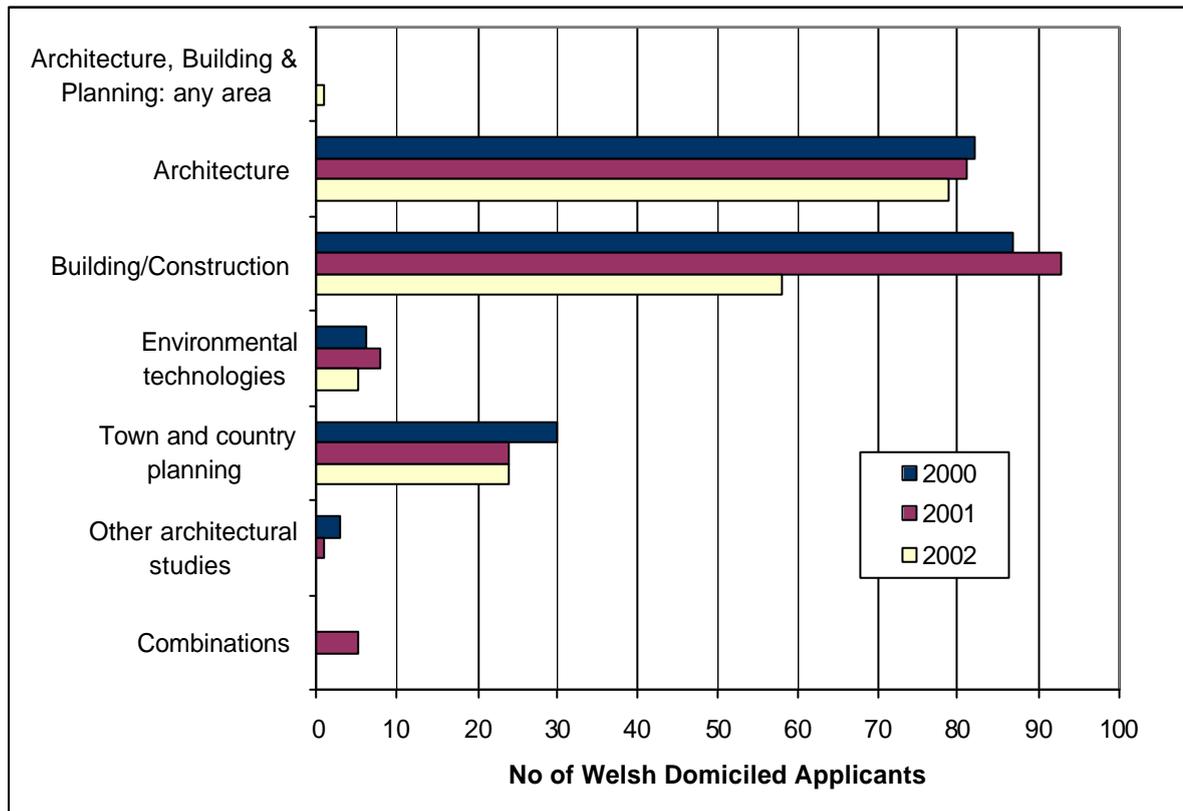
6.25 At Higher Education level, there were a total of 167 applications by Welsh domiciled students for construction – related courses across the UK in 2002. The largest group of these was for architecture courses, followed by building courses. However, demand for the latter fell heavily between 2001 and 2002.

Figure53 Applications by Welsh Domiciled Students for HE Architecture, Building and Planning Related Courses, by Gender - 2002

| JACS Subject Line | Men | Women | Total |
|--|-----|-------|-------|
| Architecture, Building & Planning: any area | 0 | 1 | 1 |
| Architecture | 58 | 21 | 79 |
| Building | 54 | 4 | 58 |
| Landscape Design | 0 | 5 | 5 |
| Planning (Urban, Rural and Regional) | 16 | 8 | 24 |
| Others in Architecture, Building & Planning | 0 | 0 | 0 |
| Combinations within Architecture, Build & Planning | 0 | 0 | 0 |
| Total | 128 | 39 | 167 |

Source: UCAS

Figure54 Applications by Welsh Domiciled Students for Architecture, Building and Planning Related HE Courses – 2000 to 2002



Source: UCAS

6.26 There was a total of 993 acceptances for places on building-related courses in Wales in 2002. The University of Wales, Cardiff, hosted the largest number of places, on architecture and planning courses.

Figure55 Acceptances on Welsh-Based HE Courses Related to Architecture, Building and Planning, 2002

| Institution Name | Total |
|--|--------------|
| Coleg Menai | 3 |
| Pembrokeshire College | 2 |
| Swansea Institute Of Higher Education | 32 |
| The North East Wales Institute Of Higher Education | 17 |
| University Of Glamorgan | 156 |
| University Of Wales Bangor | 30 |
| University Of Wales Cardiff | 649 |
| University Of Wales College Newport | 1 |
| University Of Wales Institute Cardiff | 103 |
| Total | 993 |

Source: UCAS

Figure 56 Higher Education Courses in Wales – All Levels

| Course | Qualification |
|--|---|
| Cardiff University Architectural Studies City and Regional Planning | Hon BSc Hon BSc |
| University of Wales Institute, Cardiff Architectural Design and Technology Architectural Design and Technology Building Maintenance and Management Housing Studies | HND Hon BSc Hon BSc Hon BSc |
| University of Glamorgan Architectural Engineering Architectural Technology Architectural and Building Conservation Building Services Engineering Building Studies Building Studies Built Environment Foundation Year Construction Management Landscape and Garden Design Major/Minor Honours -(Construction Management Multidiscipline Scheme (Honours) - Architectural and Building Conservation Quantity Surveying | Hon BSc Hon BSc Hon BSc Hon BEng HND Fdg FD Hon BSc HND Hon Mod Hon Mod Hon BSc |
| Coleg Menai Building Studies | HND |
| University of Wales College, Newport Building Studies Building Studies Civil and Construction Engineering | HND Hon BSc Hon BSc |
| The North East Wales Institute of Higher Education Architectural Design Technology Building Maintenance Management Building and Surveying Built Environment Studies Estate Management (Surveys and Valuations) Planning and Development | Hon BSc Hon BSc FD FD Hon BSc FD |
| Pembrokeshire College Architectural and Building Conservation | HND |
| Swansea Institute of Higher Education Building Conservation Building Conservation and Management Building Conservation and Management Building Studies Construction Management Project and Construction Management | HND Hon BSc Foundation HND Hon BSc Hon BSc |

Source: UCAS

6.27 In addition, the introduction of Foundation Degrees has led to significant provision being made available in Building, Construction and Property across Wales.

Figure 57 Foundation Degrees in Building, Construction and Property

| | |
|---|--|
| COLEG LLANDRILLO CYMRU Building Studies FD | PT |
| COLEG MENAI Building Studies Foundation Degree | FT |
| NORTH EAST WALES INSTITUTE OF HIGHER EDUCATION Building and Surveying FD Built Environment Studies FD Estate Agency FD Planning and Development FD | PT & FT PT & FT PT & FT PT & FT |
| PEMBROKESHIRE COLLEGE (ACCREDITED COLLEGE OF UNIVERSITY OF GLAMORGAN) Architectural and Building Conservation FD Computer-Aided Architectural Technology FD Sustainable Architecture FD | PT PT PT |
| SWANSEA INSTITUTE OF HIGHER EDUCATION Building Conservation and Management Foundation (Hons) Civil Engineering and Environmental Management Foundation (Hons) Construction Management Foundation (Hons) Housing Management FD Project and Construction Management Foundation (Hons) Quantity Surveying FD Valuation Management FD | FT FT FT FT FT FT FT |
| UNIVERSITY OF GLAMORGAN Building Studies FD Civil Engineering FD | FT PT & FT |
| UNIVERSITY OF WALES, ABERYSTWYTH Countryside Management FD | FT |

Source: UCAS

Summary

- There are currently 20 FE colleges offering construction related courses in Wales and in 2000-2001 an estimated 3,000 students enrolled on formal construction training courses in Wales.
- Onsite assessment and training has grown significantly since 2000 and is expected to become the main strand in delivering qualifications to the workforce.
- Private training providers include specialists such as Ty-Mawr Lime and y Faenol – providing guidance and training on a number of traditional and ecological building techniques.
- In addition, there has been a growth in popularity of vocational construction courses and work experience at school level in the region.
- New arrangements for contracting work-based learning are currently being put in place. The process requires potential providers to register interest in delivering five core programmes. Prospective suppliers will be compared on a like-for-like basis within set criteria and successful organisations will then be invited to tender for the supply of learning in their areas of expertise.
- Data from ELWa shows, that in 2000/2001, there were 24 providers delivering to 580 learners resident in Mid Wales. The majority of provision was at levels 2 and 3 and Coleg Powys was the largest provider by a substantial margin.
- Most full-time and work-based learners fall in the 16-19 age group, whilst part-time learners were more likely to be older, especially in the 25-39 age group.
- Data from providers shows a wide range of qualifications available in Mid Wales, with only limited duplication in any local area. There are, however, significant gaps in provision in areas such as plastering, painting and decorating
- At higher education level, there were 167 applications for construction-related courses from Welsh domiciled students in 2002 – of which the largest demand was for architecture courses. None of this provision was in Mid Wales.

7 The Sub-Regional Picture

Introduction

7.1 Care has to be taken in providing a sub-regional summary of the employer survey, in consideration of the original sample of 100 employers across Mid Wales. There are two issues here:

- The number of interviews achieved per unitary authority or district
- The fact that quotas for sub-sectors (plumbers, builders etc) were set at a Mid Wales level. This implies that within a given sub-region, the range of employers interviewed may not accurately reflect the sub-sectoral make-up of the local area. Hence, for example, the survey achieved a disproportionately large number of plumbing firms in Meirionnydd. Hence data from this area is likely to be coloured more by the characteristics of the plumbing sub-sector than by local issues.

7.2 Notwithstanding these caveats, the overall issues facing employers are likely to be fairly even across the region. Where this is not the case, localised factors may well impact at sub-unitary authority or district level and so it is difficult to achieve a meaningful geographic disaggregation of issues. For example, are factors affecting South Ceredigion more likely to be in common with Aberystwyth than with Machynlleth? Possibly this is the case, but in many cases it will not be so.

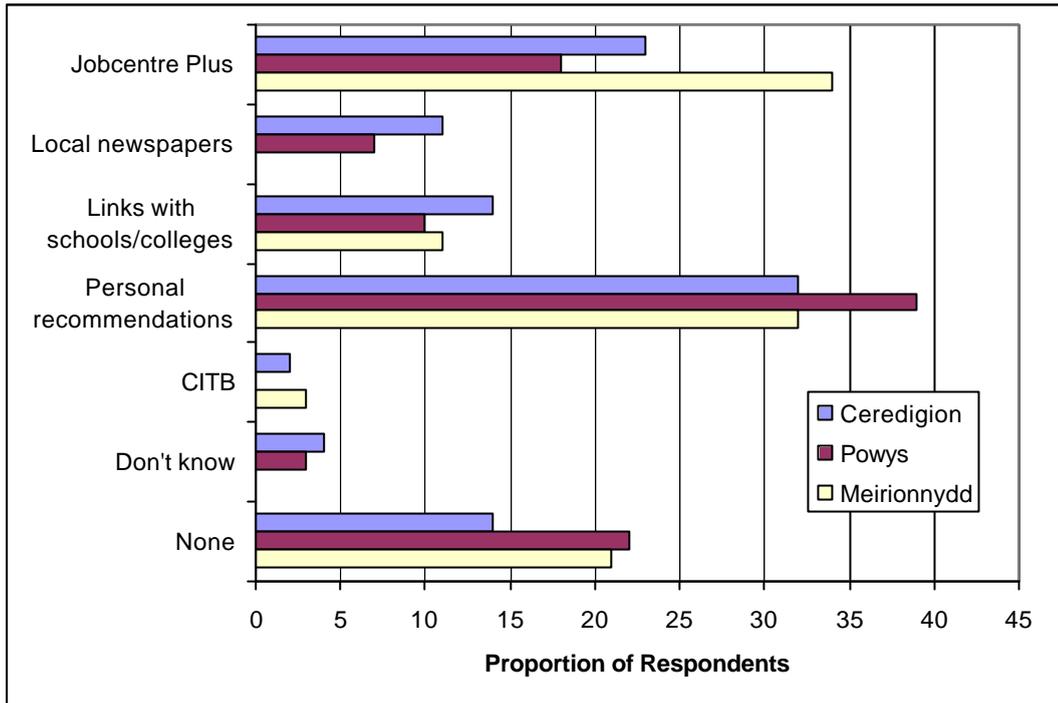
7.3 The sub-regional data presented here is selected from the employer survey where there are perceived to be noticeable and relevant differences between local areas. It should be noted, however, that even in these cases there is a significant margin of error at sub-regional level.

Recruitment and Skills

7.4 Almost one-third of Ceredigion employers recruited last year, ahead of Powys (26%) and Meirionnydd (24%).

7.5 When advertising for new recruits, firms in all areas and especially Powys were most likely to use personal recommendation. Those in Meirionnydd were more likely than others to use Jobcentre Plus.

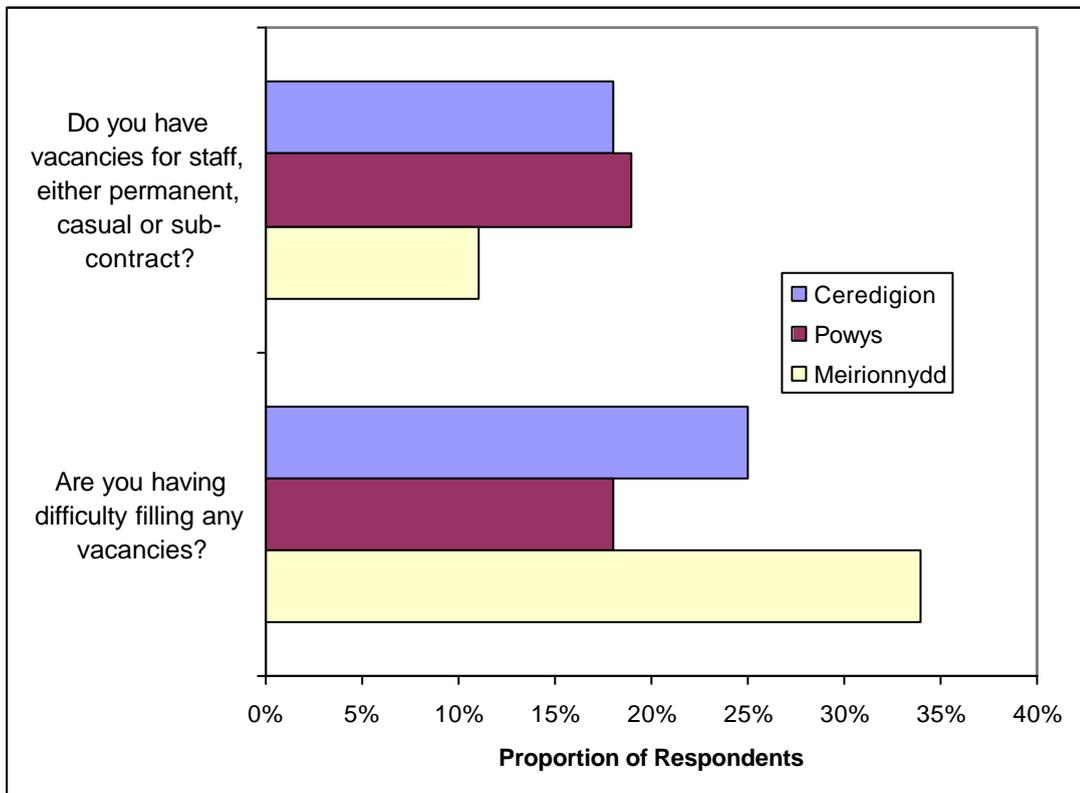
Figure 58 When Recruiting, What Means of Advertising do You Use?



Source: Employer Survey Q16. Base=101 Respondents

7.6 Just under 20% of employers in Powys had current vacancies for staff, slightly more than in either Ceredigion or Meirionnydd.

Figure 59 Vacancies – Current and Hard to Fill



Source: Employer Survey Q18/19. Base=101 Respondents

7.7 Those in Meirionnydd were the most likely to have experienced hard to fill vacancies over the last 12 months. Hard to fill vacancies in Ceredigion and Meirionnydd were for permanent staff, whereas in Powys, there were some difficulties in recruiting sub-contractors and seasonal staff as well.

7.8 In all areas, the most common reason for hard to fill vacancies was a shortage of applicants with either the skills or qualifications.

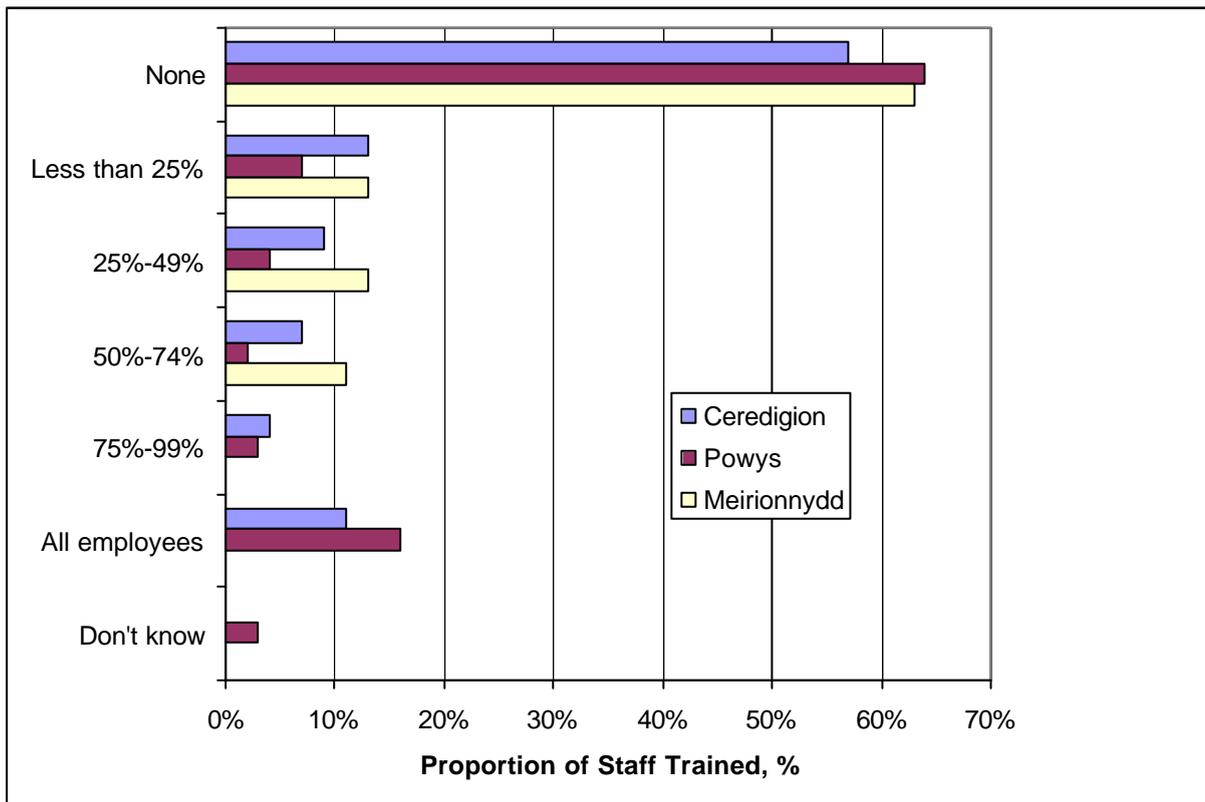
7.9 Ceredigion employers were the most likely to report a skills gap in their existing workforce (29% of employers), followed by Meirionnydd (21%) and Powys (19%).

7.10 In Ceredigion, technical skills accounted for half of identified skills gaps, whilst employers in Meirionnydd were most likely to identify a shortage of CORGI registered gas installers. Powys employers identified skills gaps in a number of areas, but most significantly in practical ability.

Involvement in Training

7.11 Employers in Powys were the most polarised in term of training staff: 65% trained no staff at all, whilst 16% trained all their staff.

Figure 60 Proportion of Staff Trained, by Area

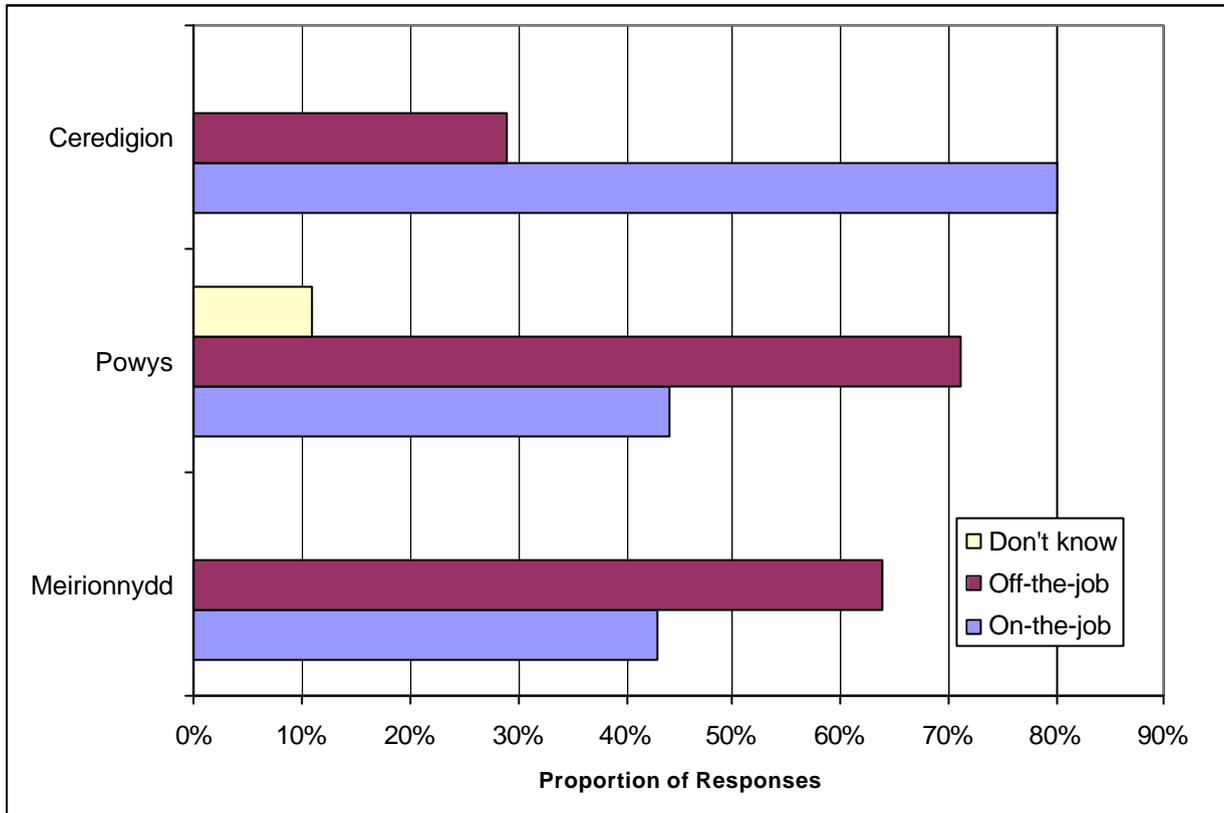


Source: Employer Survey q 28. Base=101 responses

7.12 In terms of the type of training used by employers – those in Powys and Meirionnydd were significantly more likely to use off the job training, whilst Ceredigion firms strongly favoured on the job training.

7.13 Where employers had used external training providers, those in Ceredigion were least likely to have used local providers.

Figure 61 – Proportion of Training by Type and Area



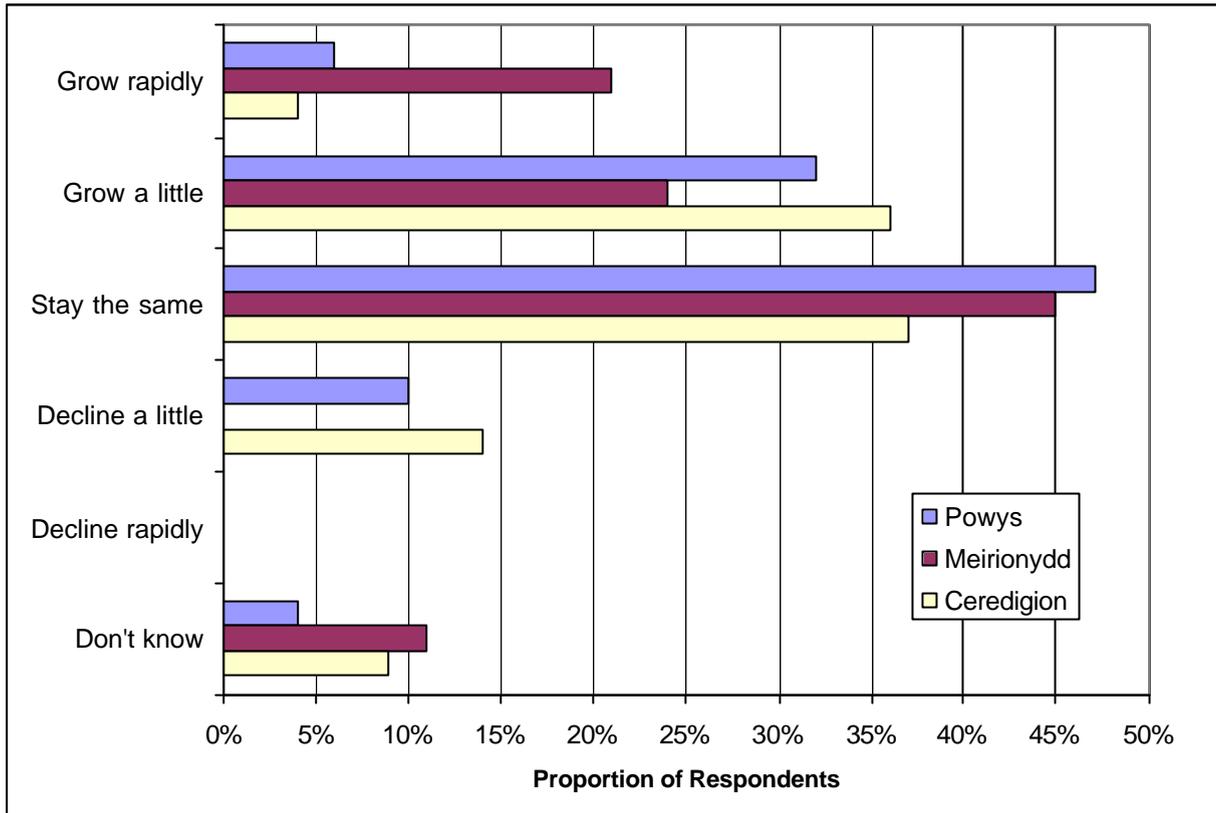
Source: Employer Survey q 30. Base=36 responses

Markets

7.14 Firms in Meirionnydd were most likely to have a customer base within 10 miles of their location, whilst those in Ceredigion were proportionately more likely to operate across the UK.

7.15 Employers in Meirionnydd were the most optimistic in terms of their expectations of market change over the next 12 months. Those in Ceredigion were the most likely to expect a slight decline in market conditions.

Figure 62 Business Optimism – Changes in Next 12 Months



Source: Employer Survey q 40. Base=101 responses

The Position in South Ceredigion

7.16 The construction sector in South Ceredigion will experience a significant boost from the Cardigan and South Ceredigion Regeneration Plan. Current capital projects include:

- Heritage initiative (£5-10m budget)
- Cardigan town improvement grants
- Townscape amenity schemes for town centre enhancement, Upper St Mary Street improvements and lighting for Cardigan Bridge
- Blaenannerch Technology Park (£7m budget)
- Parc Teifi Business Park development
- Llandysul Groesffordd Business Park
- Tourism enhancement – infrastructure and accommodation enhancement

7.17 These developments present substantial opportunities for local employers and tradespeople. In addition to the major capital works (prime responsibility for which is likely to go outside the region) projects such as the housing renewal scheme (£800K per annum over 10 years) are more likely to be accessible to Ceredigion firms.

7.18 The challenge is to maximise the share of this work accruing to local employers and thus increasing retention and impact of spend in the South Ceredigion economy.

7.19 However, Ceredigion employers consulted in the telephone survey were the most likely of any in Mid Wales to recognise skills gaps in their workforce, but were the least likely to have provided training to more than one-quarter of their workforce last year. They were also the least optimistic regarding sector prospects of any in the region.

7.20 This suggests that there may be a lack of vision amongst Ceredigion firms to take full advantage of the opportunities available to them.

7.21 Providers in the area report significant increases in applications for full-time courses over the last two years, with particular demand for plumbing courses. This may reflect an improvement in individuals' perceptions of construction as a career choice, but employers need to be encouraged to take on more staff if newly qualified tradespeople are to be retained in the area.

8 Conclusions

Conclusions

Industry Background

- 8.1 The current construction industry profile in Mid Wales is characterised by micro businesses working in a comparatively local area, mainly on repair, maintenance and restoration in the private sector.
- 8.2 Relatively buoyant market conditions mean that sufficient work is available for the majority to be both satisfied with their performance and optimistic about the future.
- 8.3 Many of the businesses are likely to be lifestyle enterprises, with little ambition to develop or expand. Levels of training are very low and this will be exacerbated by a significant proportion of firms being too small to be in scope with the CITB. Firms with a wage bill of less than £61,000 per annum are exempt from Construction Skills levy and hence may not engage with them for training, help or advice.
- 8.4 Small firms and sole traders in particular may find it difficult to devote the time to offer trainees or work placements a full range of experience. In addition there is anecdotal evidence of employers being reluctant to train young people for fear of creating competition for themselves.
- 8.5 Networking within the sector is largely limited at present to sub-contracting and project-based collaboration. There is no evidence of collective activity with regard to training.
- 8.6 There is some evidence of skills shortages and skills gaps in the existing workforce, mainly relating to technical and practical skills. However, the proportion of businesses experiencing hard to fill vacancies is comparatively low, at around 20% over the last year.
- 8.7 Significant levels of development in South Ceredigion are likely to create skills shortages, especially if local companies secure the work. There is currently no provision for training in plastering, painting and decorating or stonemasonry in Ceredigion and in these areas the current supply of new employees may be insufficient for the needs of the industry.
- 8.8 In summary, the construction sector in Mid Wales is currently structured around maintaining the status quo. It is largely ill-equipped to deal with changes or to take full advantage of opportunities in the region. One of the key structural challenges for the industry is moving from the "sole trade / low training" archetype towards a "growth businesses / high training" culture.

Future Performance

- 8.9 The performance of the construction sector in Mid Wales over the short to medium term will be significantly influenced by the continuing availability of EU Objective One funding in Ceredigion and Meirionnydd. These funds will act to directly stimulate demand for the next five years, including the "winding down" period after the main programme ends, post 2006.
- 8.10 Current drivers of change include significant planned spend in South Ceredigion, as a result of the regeneration initiative, along with a boom in the private housing sector and an increasing emphasis on traditional building and restoration techniques.
- 8.11 The Green Building Sector offers an opportunity to develop a specialist sectoral expertise in line with the available resources and image of Mid Wales. The construction sector will need to respond to "A Winning Mid Wales", the economic development strategy commissioned by the Mid Wales Partnership and due to be released during 2004.
- 8.12 The ability of local firms and the available labour force to meet demand will depend to some extent on the amount of "leakage" to other areas of Wales, the UK and Ireland.
- 8.13 It might be expected that growth in demand in Mid Wales will lead to greater retention of skills in the region. However, this will depend on the extent to which existing employers are willing to take advantage of the opportunities available to them, or the willingness to those currently working outside the area to set up businesses in Mid Wales.

Current Learning Provision

- 8.14 A total of 24 providers were delivering construction-related learning to Mid-Wales residents in 2000/01. Several of these were acting as managing agents, with the statutory sector providing the majority of delivery.
- 8.15 Within the region, there appears to be effective demarcation along Unitary Authority lines, with learners attending institutions within their local authority. There is also some leakage to providers outside the region, either for geographic convenience or to access courses unavailable in Mid Wales.
- 8.16 There are few specialist courses available within Mid Wales and providers are understandably cautious about the possibility of creating viable specialist provision in a sparsely populated, geographically dispersed rural area. However, there are examples of initiatives, such as the proposed plumbing training centre at Ceredigion Training, supported by an Objective 1 bid for funding.
- 8.17 The changing emphasis away from classroom learning to on-site delivery implies that providers will need to become more flexible, responsive to employer needs and increasingly concentrate on assessment and the training of work-based assessors.

8.18 Imminent changes in the arrangements for funding work based learning in Wales are likely to have an impact on current provision in the region. ELWa wishes to achieve a full range of training options for learners, whilst maintaining a balance between removing unnecessary competition between providers and retaining learner choice across Mid Wales.

Supply of Learners

8.19 The greatest drivers of learning within the industry are legislation and industry requirements. The current move towards employees on larger sites having CSCS cards and the impending introduction of legislation on corporate killing will both lever an increase in demand for industry training.

8.20 Other legislation with substantial impact on the industry includes the CORGI gas registration requirement, along with the more recently introduced standard for oil fitters. Existing requirements for electricians have maintained levels of training in this sector.

8.21 Funding for employers, such as that provided by the CITB, also acts to increase levels of training in the industry. Conversely, those trades within the remit of Summit Skills do not enjoy the benefit of funding support and hence employers may be more reluctant to train these employees.

8.22 There has been an increase in demand for learning from young people and other potential industry entrants. This growth has been driven by perceptions of relatively high earnings in the industry, along with the availability of jobs at a local level. However, some stereotypical images of construction remain true, with a workforce heavily biased towards white middle-aged males.

Comment

Redesigning Delivery

8.23 It is clear that a greater degree of regional planning of training provision is desirable in Mid Wales. Learners need to be offered a full range of construction-related courses within a reasonable distance of their home or workplace, provided at times and through channels acceptable to both individuals and employers.

8.24 The learning network should allow for high levels of collaboration amongst providers, whilst retaining an element of learner choice where possible.

8.25 In some cases this is likely to require collaboration with providers from outside the region. If the best interests of learners are to be served, it may be obstructive to prioritise the creation of a strictly regional model.

8.26 The geographically dispersed nature of Mid Wales implies a need for essentially local solutions to learner needs. In some ways this works against the desire to increase

levels of specialist training in the region, in that smaller areas mean smaller numbers. Hence an innovative, tailored approach to delivery needs to be adopted. This could include a mix of a factors, for example including:

- Development of the Mid Wales learning network to create a true partnership in learning provision.
- Identification of core expertise within provider organisations and assignment of sub-sectoral leads on areas of specialist training - earmarking certain institutions or sites as centres for certain trades.
- Increasing the extent of OSAT to relocate delivery into the workplace.
- Increasing training for assessors to support OSAT.
- Reinforcing local provision through the use of mobile centres.
- Taking control of gaps in provision by jointly buying in expertise from outside the region and allocating it to where it will have most impact.

Case Study 2 Mobile Provision in Rural Areas - the Leek e-Bus

One of example of flexible mobile learning provision in a relatively remote rural area is the Leek e-Bus. The vehicle was developed from a former mobile library in a joint venture between two North Staffordshire colleges. It features mobile satellite technology to link eight flatscreen computer workstations to the internet. This allows supported learning across a wide range of courses in almost any location.

The bus has been successfully used to deliver workplace-based learning, ranging from basic skills and ICT to more specialist vocational areas for rural employers.

www.ebus.org.uk

8.27 A planned system of training provision could have the benefit of making all courses potentially more viable, by offering a holistic approach to industry and career development. It may also attract additional learners by reversing the leakage to neighbouring areas that Mid Wales is currently experiencing. One well-rehearsed question is whether provision should be in relation to learner / employer demand, or whether it should be designed to train for stock in occupational areas where skills and labour shortages are forecast.

8.28 ELWa is currently committed to creating learner-centred delivery, which would suggest the former approach. This is somewhat in contrast to the approach taken by LSC in England, where provision is now being structured more around the needs of employers and priority industrial sectors.

8.29 There are a number of issues with the training for stock approach:

- It can lead to creation of provision for which there is no demand from learners

- The lead times for training skilled individuals can mean that provision is reacting to out of date information
- Providing for forecast skills shortages does not address the issue of leakage to other areas.

8.30 A more appropriate approach might be to:

- Base provision on demand from learners / employees, supplemented by incremental shifts in relation to expected market conditions. (This is essentially what FEIs do at present).
- Focus heavily on engaging employers in a learning culture, to respond to their upskilling needs and to encourage them to train for succession.
- Use industry forecasts as an information and marketing resource, to encourage individuals to consider training in predicted shortage areas.

8.31 This combination of approaches could deliver provision that is appropriate in a local context and which will maximise the sustainability of the industry at a local level, whilst minimising the risk to providers in developing new courses and facilities.

8.32 The shortage of relevant work experience available to trainees is a major issue that needs addressing. This could be done by actively recruiting and attempting to retain a hard core of employers who are committed to training workers. The public sector can set an example, given its position as one of the major construction employers in the region.

8.33 The nature of the industry in Mid Wales requires employees to be multi-skilled and training provision needs to reflect this.

8.34 The lack of basic skills among younger trainees is a barrier to completion of NVO frameworks. Providers may require additional support to adapt training courses in order to make some provision for those learners whose basic skill levels need substantial improvement.

8.35 One issue that affects learning in Mid Wales is the difficulty trainees have in reaching learning sites. Where sufficient localised provision cannot be provided, support for transport arrangements should be investigated. This could take the form of financial support via travel or accommodation subsidies, or the co-ordination of transport from certain areas. Providers should look into helping learners reach the centres from often remote areas.

8.36 All changes in provision need to be sustainable, i.e. should be made in the context that the growth of the sector will slow at some point. Rather than undergo the "boom and bust" levels of investment which construction provision has witnessed in previous years, a relatively constant stream of investment will ensure the needs of learners are met consistently.

Increasing Demand

8.37 Levels of construction training in Mid Wales are currently very low. Employers need to be made aware of the benefits of upskilling their existing and potential workforce, in terms of the potential for:

- Increased profitability
- Greater efficiency
- Access to new markets and contracts
- Conformance to legislation, industry safety and due diligence requirements.

8.38 However, It may not be sufficient to address these issues at an individual employer level. The creation of group training associations, or training groups, has been successfully achieved elsewhere and in other sectors and may represent a good approach to construction in Mid Wales.

8.39 One existing example is the series of training groups co-ordinated by Coleg Sir Gar across SW Wales. These typically centre on a large, willing employer who can host events for a group of smaller businesses and jointly commission training or co-ordinate workshop sessions for managers.

8.40 The initiative has been very successful in drawing down funding from CITB and has significantly increased the levels of specialist and technical training available to employers.

8.41 With the large number of small firms operating in Mid Wales, the onus for greater co-ordination would appear to be on providers rather than any "flagship" employer. However, the creation of local groups, co-ordinated by FEIs could offer potential gains.

8.42 An alternative would be for the public sector, and especially local authorities, to take a lead in co-ordinating training groups within their respective areas. As major employers in the sector and customers for sub-contractors, local authorities are well placed to bring the sector together at sub-regional level.

8.43 Every effort should be made to raise awareness amongst individuals, both old and young alike, about the growing importance of acquiring formal qualifications and initiatives such as the CSCS scheme. The public sector can assist this process by adopting procurement policies that favour contractors who can prove that their workforce is formally qualified.

8.44 The industry, although reportedly becoming more attractive to potential entrants, needs to improve its image further. The sector would benefit from the recruitment of trainees who are more capable academically and who have a good grounding in basic skills. This can be influenced by continuing to improve the image of the sector both in the eyes of young people and in the perceptions of careers advisors and other key influencers. Some potential means of achieving this might include:

- Workshops for careers guidance officers on the benefits of a career in the construction industry
- Presentations to schools of careers in the construction industry and site visits where possible.

9 Recommendations

- 1. Establish an effective sectoral learning network in Mid Wales supported by Construction Skills, to collaborate on provision.** This will allow Mid Wales and its sub-regions to develop provision that meets the needs and aspirations of learners, employers and the economy.
 - The challenge here is to remove unnecessary competition between providers, whilst maximising learner choice and ensuring quality of provision.
 - The process of developing the network should begin with the steering group established for this project meeting to address issues raised in this report.
 - The sectoral network could initially collaborate to deliver training driven by legislation and voluntary standards in the industry, possibly through mobile provision.
- 2. Identify key competences and allocate lead providers for key specialisms.**
 - As part of a network approach, it will be beneficial to identify specialisms within Mid Wales and promote investment in regional centres of excellence. Appendix 3 of this report lays out the range of provision available from FEIs in the region. The identification of specialisms should be based upon this.
- 3. Investigate the formation of employer-focused training groups led by colleges or Local Authorities, as part of recommendation 1. This should be piloted on South Ceredigion and led by Coleg Ceredigion.**
 - Effective training groups will allow successful partnerships to be developed amongst employers and between employers and providers. The example in Carmarthenshire relied on the commitment of some larger employers to achieve critical mass. Whilst this may not be possible in Mid Wales, it may be feasible to develop an alternative model, using a committed nucleus of active small employers.
 - Alternatively, the public sector may provide an appropriate lead. Coleg Ceredigion should lead the initial pilot, with the support of Construction Skills.
 - The process can be started by holding a workshop event for employers in South Ceredigion, to inform them of the possibilities offered by training groups.
- 4. Conduct feasibility study for mobile training provision for the delivery of OSAT and bite-sized courses in Mid Wales, through recommendation 1.**
 - A mobile centre could be jointly developed and facilities shared across the Mid Wales region. Existing examples, such as the Leek e-Bus should be used to benchmark designs for delivery.
- 5. Support the development of increased OSAT in the region.**

- Mid Wales currently has no Construction Skills accredited OSAT centres. Individual providers, or the provider network as a whole, should investigate development of one or more accredited centre, possibly linked to the mobile delivery cited in the previous recommendation.
- 6. Commission provision in areas not currently provided for –**
- Especially multi-skilled general builders, plastering, stonemasonry, plumbing and painting and decorating.
 - Where the viability of new provision may be difficult to establish in the short term, alternative means of funding risk need to be identified.
- 7. Improve provision of effective work experience to school pupils and increasing the availability of work placements for WBL students through:**
- Investment in illustrating potential benefits to employers and
 - Providing administrative support and advice to employers considering the provision of work experience. The lack of availability of quality work placements and work experience opportunities are identified as a key barrier to developing work-ready students for the industry.
- 8. Increase demand for learning by informing employers of impending legislation and industry requirements.**
- Much of the training accessed by employers is driven by the legislative needs of the sector, or in order to comply with voluntary standards on larger construction sites. Anecdotal evidence suggests that workers can boost their earnings by as much as 100% by gaining accreditation for their skills.
- 9. Respond to the potential for Green Building sector.**
- Consider the opportunities identified in A Winning Mid Wales, when it is released. The Green and heritage sectors have been identified as offering opportunities ideally suited to the characteristics of construction firms in the region.
- 10. Work with Construction Skills to identify and develop training and development activities relevant to Mid Wales, considering:**
- That the region is characterised by micro businesses
 - The current record of low engagement with learning.
- 11. Develop additional workplace support for first-time employees who have not yet been able to reach level 2**
- It has been identified that some industry entrants have low levels of essential skills, which prevent them achieving vocational qualifications at level 2.
- 12. Action to address negative perceptions of the industry and to increase its attractiveness to academically more able students.**

- Increase the quality of regionally accessible learning, including the franchising of HE level provision into the region
- Increase the promotion of careers in the industry to school pupils
- Develop better education industry links to increase understanding of the modern construction sector.
- Boost sector image through presentations to schools, careers advisors and other key influencers, including parents. The construction sector still suffers from negative perceptions from these groups in particular. There is, however, evidence that young people themselves are more likely to favour a career in construction and this should be capitalised upon.
- Develop role models and associated literature, possibly highlighting the lifestyle benefits of a construction career in Mid Wales

13. Improve data availability to identify learner numbers per qualification aim and location of learning.

- Investigate ways of making learner data held by ELWa more accessible to partner organisations, especially CCETs and sector working groups, to facilitate more effective planning.
- Engage with Construction Skills to revise employment models to fit with current Welsh sub-regions

14. Develop trainer skills in retiring tradespeople to encourage skills transfer through work-place mentoring or by their becoming tutors

15. Develop school activities such as artisan's clubs

- Existing activities have demonstrated the value of engaging young people at school. However, sustainable funding sources need to be identified if clubs are to maximise their impact.

16. Work within the new credit and qualification framework to deliver bite-sized courses – encouraging training through gaining credits.

- Employers state a preference for short courses. The possibilities offered by the credit based framework need to be communicated to employers and employees.

17. Address current need for general builders to maintain the sector as retirements occur.

- Many existing micro businesses in the industry are unlikely to continue when the current employer retires. Hence a steady flow of new, multi-skilled builders and electricians needs to be produced in order to maintain the sector at its current size.

- 22% of interviewees acknowledged a skills gap in their existing workforce, mainly affecting electricians and skilled general builders. The main skills lacking were technical and practical.

18. Develop a regional approach to planning

- There is little evidence of a regional approach to planning at present and limited evidence of planning at a UA level through CCETs.
- A need for regional planning may be best served by a regional or sectoral level approach, reporting to CCETs and making recommendations to other key planning bodies, such as 14-19 Networks

19. Investigate franchising HE construction courses into Mid Wales.

- There is currently no HE provision in any built environment subject in the region.

Summary of Recommendations

| No. | Action | Timescale | Responsibility |
|------------|--|------------------|--|
| 1 | Establish an effective sectoral learning network in Mid Wales supported by Construction Skills, to collaborate on provision. | Urgent | ELWa, Providers, CCETs, Construction Skills |
| 2 | Identify key competences and allocate lead providers for key specialisms | Short | ELWa, Providers, CCETs |
| 3 | Investigate formation of employer-focused training groups led by colleges or Local Authorities, as part of recommendation 1. This should be piloted on South Ceredigion and lead by Coleg Ceredigion. | Short | Providers, Construction Skills, |
| 4 | Conduct feasibility study for mobile training provision for the delivery of OSAT and bite-sized courses in Mid Wales, through recommendation 1. | Short | Providers, ELWa, Construction Skills |
| 5 | Support the development of increased OSAT in the region | Medium | Providers, ELWa |
| 6 | Commission provision in areas not currently provided for – especially multi-skilled general building, plastering, stonemasonry, plumbing and painting and decorating | Medium | Provider Network |
| 7 | Improve provision of effective work experience to school pupils and increasing the availability of work placements for WBL students through (1) investment in illustrating potential benefits to employers and (2) providing administrative support and advice to employers considering the provision of work experience | Medium | Careers, Employers, Construction Skills |
| 8 | Increase demand for learning by informing employers of impending legislation and industry requirements | Medium | Providers, Construction Skills and Employer Groups |
| 9 | Respond to the potential for Green Building sector, and consider the opportunities identified in A Winning Mid Wales, when it is released | Medium | All Partners |
| 10 | Work with Construction Skills to identify and develop training and development activities relevant to and targeted at the requirements of a region characterised by micro businesses with a current record of low engagement with learning. | Medium | ELWa, Providers, Construction Skills |
| 11 | Develop additional workplace support for first-time employees who have not yet been able to reach level 2 | Medium | ELWa, Providers |
| 12 | Action to address negative perceptions of the industry and to increase its attractiveness to academically more able students. | Longer | ELWa, Construction Skills, Careers, Providers, |

| | | | |
|----|--|--------|--|
| | <ul style="list-style-type: none"> • Increase the quality of regionally accessible learning, including the franchising of HE level provision into the region • Increase the promotion of careers in the industry to school pupils • Develop better education industry links to increase understanding of the modern construction sector. • Develop role models and associated literature, possibly highlighting the lifestyle benefits of a construction career in Mid Wales • Boost sector image through presentations to schools, careers advisors and other key influencers, including parents | | |
| 13 | <p>Improve data availability to identify learner numbers per qualification aim and location of learning. Engage with Construction Skills to revise employment models to fit with current Welsh sub-regions</p> | Short | ELWa, Construction Skills, Providers |
| 14 | Develop trainer skills in retiring tradespeople to encourage skills transfer through work-place mentoring or their becoming tutors | Medium | Construction Skills, Providers, Employers. |
| 15 | Develop school activities such as artisan's clubs | Medium | Providers, Schools, Careers, Construction Skills |
| 16 | Work within the new credit and qualification framework to deliver bite-sized courses – encouraging training through gaining credits | Medium | Construction skills, Providers, ELWa, employers |
| 17 | Address current need for general builders and electricians to maintain the sector as retirements occur. Actions to address skills gaps. 22% of interviewees acknowledged a skills gap in their existing workforce, mainly affecting electricians and skilled general builders. | Medium | Construction Skills, Providers, Employers, ELWa |
| 18 | Develop a regional approach to planning. A need for regional planning may be best served by a regional or sectoral level approach, reporting to CCETs and making recommendations to other key planning bodies, such as 14-19 Networks | Medium | Providers, Employers. |
| 19 | <p>Investigate franchising HE construction courses into Mid Wales.</p> <ul style="list-style-type: none"> • There is currently no HE provision in any built environment subject in the region | Medium | ELWa, Construction Skills, Providers |

Appendix 1 Further Education Courses in Construction Related Subjects, Mid Wales and Borders, 2003/4

Figure 63 Construction courses Available at Coleg Ceredigion, Cardigan

| Programme | Level |
|---|-------|
| Wood Occupations (Sitework and Benchwork) NVQ | 2 & 3 |
| Trowel Occupations NVQ | 2 & 3 |

Figure 64 Construction courses Available at Coleg Powys

| Course | Term | Location |
|--|-----------|----------------|
| NVQ Level2 – Trowel Occupations | 2 years | Brecon/Newtown |
| NVQ Level3 – Trowel Occupations | 2 years | Brecon/Newtown |
| NVQ Level2 – Wood Occupations | 2 years | Brecon/Newtown |
| NVQ Level3 – Wood Occupations | 2 years | Brecon/Newtown |
| NVQ Level2 – Decorative Occupations | 2 years | Newtown |
| NVQ Level3 – Decorative Occupations | 2 years | Newtown |
| Intermediate Construction Award | 2 years | Brecon/Newtown |
| Advanced Construction Award | 2 years | Brecon/Newtown |
| CG 6081 Basic Bricklaying Skills | 1-2 years | Brecon/Newtown |
| CG 6135 Basic Woodworking Skills | 1-2 years | Brecon/Newtown |
| CG 6091 Basic Painting & Decorating | 1-2 years | Brecon/Newtown |
| Foundation Certificate in Building Craft Operations | 1 year | Brecon/Newtown |
| BTEC National Award Construction | 2 years | Newtown |
| BTEC National Certificate Construction | 3 years | Newtown |
| UFI LearnDirect Construction Related Courses | Variable | Brecon/Newtown |
| CG 2361 Part1 – Electrical Installation (Theory) | 1 year | Newtown |
| CG 2361 Part1 – Electrical Installation (Competences) | 1 year | Newtown |
| CG 2361 Part2 – Electrical Installation (Theory) | 1 year | Newtown |
| CG 2290 Fabrication and Welding Competences Level2 | 2 years | Newtown |
| CG 2290 Fabrication and Welding Competences Level2 | 2 years | Newtown |
| City & Guilds 6081 Basic Brickworking Skills | 1 year | Brecon/Newtown |
| City & Guilds 6135 Basic Woodworking Skills | 1 year | Brecon/Newtown |
| City & Guilds 6091 Basic Painting & Decorating Skills | 1 year | Newtown |
| AVCE Single Award Construction & the Built Environment | 1 year | Newtown |
| AVCE Double Award Construction & the Built Environment | 2 years | Newtown |
| BTEC National Certificate in Construction | 2 years | Newtown |
| BTEC National Award in Construction | 1 years | Newtown |

Figure 65 Construction courses available at Coleg Meirion Dwyfor

| |
|---|
| Evening taster course in brickwork |
| Basic course in welding, |
| NVQ 1, 2 and 3 in brickwork (full or part time.) |
| City and guilds 6081 in brickwork, |
| NVQ 1, 2 and 3 in carpentry and joinery, (full or part time.) |

Figure 66 Construction courses available at Ceredigion Training

| |
|--|
| NVQ1 in wood trades, NVQ 2 in Carpentry & Joinery. |
| NVQ 2 & 3 in plumbing. |
| NVQ 3 in Electrical installations. |
| City & Guilds 6135 Basic Woodworking Skills |
| City & Guilds 6111 Basic Carpentry & Joinery |

Figure 67 Construction courses available at Pembrokeshire College

| |
|--|
| Foundation/pre-apprenticeship construction, national certificate/ diploma in construction and civil engineering, |
| HNC computer aided in architectural technology (2 years part time.) |
| HND/ foundation degree architectural and building conservation, (2 years, full or part time.) |
| HNC/foundation degree in computer aided design (CAD, 2 years, part time.) |
| Foundation degree in sustainable architecture, (2 years full time, 3 years part time.) |
| BSc in project construction management, (part time, not currently running.) |
| OCN brickwork (full or part time.) |
| NVQ 2, 3 and ICA in bricklaying, (full or part time.) |
| NVQ 2, 3 and ICA in carpentry and joinery, |
| NVQ 2, 3 and ICA in painting and decorating,(full or part time.) |
| OCN, NVQ 2 and 3 in foundation certificate plumbing (full or part time 1 year for each level.) |
| OCN interior décor. |

Figure 68 Construction courses available at Coleg Menai

| |
|---|
| Brickwork NVQ Level 1 Foundation Course (Full time 1 year.) |
| Bricklaying NVQ Level 2 (Full time 2 years, 3 days college, 2 days site.) |
| Brickwork - NVQ Level 2 (Part time 1 day a week 2 years RORO basis need NVQ level 1 in brickwork.) |
| Building Studies - HND Top up (Part time 1 day a week 1 year.) |
| Building studies – BTEC HNC (part time 1 day a week 2 years existing workers.) |
| Brickwork C&G Intermediate Construction Award (Full time 2 years.) |
| Brickwork - NVQ Level 3 (Part time 1 day a week 1 year RORO basis need NVQ 1 and 2 in brickwork.) |
| Carpentry & Joinery - NVQ Level 1 Foundation Course (Full time 1 year.) |
| Civil Engineering BTEC HNC (Part time 1 day a week 2 years.) |
| Construction - NVQ 3 Advanced Professional Certificate (Bridging Course) (Part time 1 day a week 1 year.) |
| Construction and the Built Environment - EDEXCEL GNVQ Foundation (Part time 1 day a week 1 year.) |
| Construction and the Built Environment - Edexcel GNVQ Intermediate (Full time 1 year.) |
| Construction and the Built Environment - Edexcel Advanced VCE - 6 or 12 Units (Full time 1-2 years need 4 GCSEs at grade C or above or GNVQ Intermediate or Craft NVQ.) |
| Construction National Certificate (Part time 1 day a week 1 year existing workers.) |
| Craft Mason C&G Intermediate Construction Award (Full time 2 years.) |
| Foundation Degree in Building Studies (Full time 2 years.) |
| Gas Water Heating Appliances - ACS (Part time 2 days a week 1 year.) |
| Stonemasonry - C&G Intermediate Construction Award (Full time 2 years for those wanting to enter the industry.) |
| Site & Bench Route - C&G Intermediate Construction Award (Full time 2 years for those wanting to enter the industry.) |
| Plastering - NVQ Level 3 (Part time 1 day a week 1 year RORO basis need NVQ 1 and 2 in plastering.) |
| Plastering - NVQ Level 2 (Full time 2 years need NVQ 1 in plastering.) |
| Plastering - NVQ Level 2 (Part time 1 day a week 2 years RORO basis needs NVQ 1 in plastering.) |
| Plastering - NVQ Level 1 Foundation Course (Full time 1 year.) |
| Plastering - C&G Intermediate Construction Award - (Full time 2 years for those not already employed in the industry.) |
| Mechanical Services (Plumbing) - NVQ Level 3 (Part time 1 day a week RORO basis need NVQ Level 2 Mechanical Services Plumbing.) |
| Mechanical Services (Plumbing) - NVQ Level 2 Foundation Course (Full time 1 year designed for school leavers.) |
| Mechanical Services (Plumbing) - NVQ Level 2 (Part time 1 day a week RORO basis need NVQ level 1 in mechanical services (plumbing).) |
| Mechanical Services (Plumbing) - NVQ level 1 (Part time 1 day a week 1 year RORO basis.) |
| Wood Occupations (Site Work) - NVQ Level 3 (Part time 1 day a week 1 year RORO basis.) |

| |
|--|
| Stonemasonry - NVQ Level 2 (Full time 2 years.) |
| Stonemasonry - NVQ Level 2 (Part time 1 day a week 2 years RORO basis existing workers.) |
| Wood Occupations (Site Work) - NVQ Level 2 (Part time 1 day a week 1 year RORO basis existing workers.) |
| Wood Occupations (Site or Bench Work) - NVQ Level 2 (Full time 2 years must be employed within the construction industry working at a site or bench carpentry and joinery. Learner must fulfil CITB criteria.) |
| Wood Occupations (Bench Work) - NVQ Level 3 (Part time 1 day a week 1 year RORO basis need NVQ level 2 wood occupations aimed at existing workers.) |
| Wood Occupations (Bench Work) - NVQ Level 2 (Part time 1 day a week 2 years RORO basis need NVQ level 1 wood occupations aimed at existing workers.) |
| Stonemasonry NVQ level 3 (Part time 1 day a week a year RORO basis existing workers.) |

Figure 69 Construction courses Available at Shrewsbury College of Art & Technology (SCAT)

| Programme | Level | Method |
|---|-------|-----------|
| Plumbing Craft C&G 6019 NVQ 2 Yr 1 | 2 | Part-time |
| Plumbing Craft C&G 6019 NVQ 2 Yr 2 | 2 | Part-time |
| Plumbing Craft C&G 6019 NVQ 2 Yr 3 | 2 | Part-time |
| Plumbing Craft C&G 6019 NVQ 3 Yr 1 | 3 | Part-time |
| Certificate in Plumbing C&G 6988 (Day) | 3 | Part-time |
| Certificate in Plumbing C&G 6988 (Evening) Yr 1 | 1 | Part-time |
| Central Heating Boilers A.C.S . | 1 | Part-time |
| Cooking Appliances A.C.S. | 3 | Part-time |
| Gas Core Safety A.C.S. | 3 | Part-time |
| Gas Fires & Wall Heaters A.C.S. | 3 | Part-time |
| Laundry Appliances A.C.S. | 3 | Part-time |
| Instantaneous Water Heaters A.C. S . | 3 | Part-time |
| Brickwork CITB NVQ 2 Yr 1 | 2 | Part-time |
| Brickwork CITB NVQ 2 Yr 2 | 2 | Part-time |
| Brickwork CITB NVQ 2 Yr 3 | 3 | Part-time |
| Basic Bricklaying Skills C&G 6081 | 1 | Part-time |
| Basic Bricklaying Skills C&G 6081 Yr 1 | 1 | Part-time |
| Basic Bricklaying Skills C&G 6081 Yr 2 | 1 | Part-time |
| Carpentry & Joinery Yr 1 CITB NVQ 2 | 2 | Part-time |
| Carpentry & Joinery Yr 2 CITB NVQ 2 | 2 | Part-time |
| Carpentry & Joinery Yr 3 CITB NVQ 3 | 3 | Part-time |
| Basic Carpentry & Joinery Skills C&G 6111 | 2 | Part-time |
| Basic Bench Joinery C&G 6135 | 1 | Part-time |
| Site Carpentry & Joinery Yr 1 C&G 6111 | 2 | Part-time |
| Site Carpentry & Joinery Yr 2 C&G 6111 | 2 | Part-time |
| Painting & Decorating CITB NVQ 2 Yr 1 | 2 | Part-time |
| Painting & Decorating CITB NVQ 2 Yr 2 | 2 | Part-time |
| Painting & Decorating CITB NVQ 2 Yr 3 | 3 | Part-time |
| Electrical Installation NVQ 2 Yr 1 | 2 | Part-time |
| Electrical Installation NVQ 2 Yr 2 | 2 | Part-time |
| Electrical Installation NVQ 3 | 3 | Part-time |
| Electrical Installation C&G 2360-1 Yr 1 | 2 | Part-time |
| Electrical Installation C&G 2360-1 Yr 2 | 2 | Part-time |
| Construction Skills for Employment NPTC Certificate | 0 | Part-time |
| Building Studies BTEC National Certificate Yr 1 | 3 | Part-time |
| Building Studies BTEC National Certificate Yr 2 | 3 | Part-time |

| | | |
|---|---|-----------|
| Building Studies BTEC HNC Yr 1 | 4 | Part-time |
| Building Studies BTEC HNC Yr 2 | 4 | Part-time |
| Building Foundation Construction Award City & Guilds / CITB | 1 | Full-time |
| Intermediate Construction Award City & Guilds / CITB | 2 | Full-time |
| Construction BTEC National Diploma | 3 | Full-time |

Figure 70 Construction courses available at Herefordshire College of Technology

| |
|--|
| Construction Crafts & Supplementary Studies Yrs 1 & 2 |
| EdExcel / BTEC National Diploma in Construction |
| Electrical Installation Engineering (Full Time) |
| Furniture Skills & Woodcrafts Yr 1 & 2 |
| Introduction to Furniture Painting |
| Modern Apprenticeship in Carpentry and Joinery (NVQ Levels 2, 3) |
| Modern Apprenticeship in Painting and Decorating (NVQ Levels 2, 3) |
| Modern Apprenticeship in Bricklaying (NVQ 2 & 3) |
| NVQ 2 Bricklaying |
| NVQ 2 Brickwork |
| NVQ 2 Furniture Yr 1 & Yr 2 |
| NVQ 2 Painting & Decorating (Day) |
| NVQ 2 Painting & Decorating (Eve) |
| NVQ 2 Wood Occupations |
| NVQ 2 Wood Occupations (Eve) |
| NVQ 3 Painting & Decorating |
| NVQ 3 Wood Occupations |
| NVQ Levels 1 to 3 in Bench Joinery |
| NVQ Levels 1 to 3 in Bricklaying |
| NVQ Levels 1 to 3 in Carpentry and Joinery |
| NVQ Levels 1 to 3 in Painting and Decorating |
| NVQ Welding Level 2 |
| NVQ Wood machining |
| OCN Basic Brickwork |
| OCN Carpentry |
| OCN Foundation in Decorative Techniques |
| Welder Approval (coding) |
| Wood Machinery Training |

Source: <http://www.herefordtech.co.uk>

Appendix 2 Qualifications in Construction

Figure 71 Vocational Qualifications in Construction

| NVQ Title | Level | Awarding Body |
|---|-------|-----------------------|
| Accessing Operations and Rigging (Construction) | 1 | CITB-C&G |
| | 2 | CITB-C&G |
| | 3 | CITB-C&G |
| Applied Waterproof Membranes | 2 | CITB-C&G |
| Architectural Technology | 4 | EDEXCEL-BIAT-CIOB-ICE |
| Building Control | 4 | ABBE |
| Building Maintenance and Estate Service | 3 | C&G |
| | 4 | C&G |
| Building Services Engineering - Design | 4 | EDEXCEL-CIBSE-SUMMIT |
| Building Services Engineering - Site Supervision | 3 | EDEXCEL-CIBSE-SUMMIT |
| Chimney Engineering | 2 | CITB-C&G |
| Conservation Consultancy | 5 | EDEXCEL-CIOB-ICE |
| Conservation Control | 4 | EDEXCEL-CIOB-ICE |
| Construction & Civil Engineering Services | 2 | CITB-C&G |
| Construction and Civil Engineering Services | 1 | C&G |
| | 1 | CITB-C&G |
| | 2 | C&G |
| Construction and Civil Engineering Services (Road Building) | 2 | EPIC |
| Construction Contracting | 3 | ABBE |
| | 3 | EDEXCEL-CIOB-ICE |
| | 4 | ABBE |
| | 4 | EDEXCEL-CIOB-ICE |
| Construction Contracts Management | 5 | ABBE |
| | 5 | EDEXCEL-CIOB-ICE |
| Construction Plant and Equipment Management | 4 | EDEXCEL |
| Construction Plant and Equipment Supervision | 3 | EDEXCEL |
| Construction Site Management | 4 | EDEXCEL |
| Construction Site Supervision | 3 | EDEXCEL |
| Decorative Occupations (Construction) | 2 | CITB-C&G |
| | 3 | CITB-C&G |
| Demolition (Construction) | 2 | CITB-C&G |
| | 3 | CITB-C&G |
| Domestic Natural Gas Installation | 2 | C&G |
| | 3 | C&G |
| Domestic Natural Gas Installation and Maintenance (ACS) | 2 | C&G |
| | 3 | C&G |
| Domestic Natural Gas Maintenance | 2 | C&G |
| | 3 | C&G |
| Electrical Machine Repair and Rewind | 3 | C&G |
| Electrical Panel Building | 3 | C&G |
| Electrotechnical Services | 3 | C&G |
| Facade Maintenance | 2 | CITB-C&G |
| Fencing | 2 | LA |
| | 3 | LA |
| Fenestration Installation and Surveying | 2 | GOA |

| | | |
|---|---|------------------|
| | 3 | GOA |
| Fitted Interiors | 2 | CITB-C&G |
| Floor Covering (Construction) | 1 | CITB-C&G |
| | 2 | CITB-C&G |
| | 3 | CITB-C&G |
| Form Working | 1 | CITB-C&G |
| | 2 | CITB-C&G |
| | 3 | CITB-C&G |
| Gas Emergency Service Operations (ACS) | 3 | C&G |
| Gas Network Operations | 1 | C&G |
| Gas Network Operations - Craft | 3 | C&G |
| Gas Network Operations - Main laying | 2 | C&G |
| Gas Network Operations - Service laying | 2 | C&G |
| Gas, Service Installation and Maintenance | 3 | C&G |
| Glazing Installation and Maintenance | 2 | GOA |
| | 3 | GOA |
| Highways Maintenance | 4 | OU-TVG |
| Installing Electro-technical Systems | 2 | C&G |
| Insulation and Remedial Maintenance Operations (Construction) | 2 | C&G |
| Insulation Installing | 1 | C&G-NEACT |
| Interior Systems | 1 | CITB-C&G |
| | 2 | CITB-C&G |
| | 3 | CITB-C&G |
| Land Drilling | 1 | CITB-C&G |
| | 2 | CITB-C&G |
| Maintenance Operations | 2 | CITB-C&G |
| Mastic Asphaltting | 2 | CITB-C&G |
| | 3 | CITB-C&G |
| Passive Fire Protection (Construction) | 2 | CITB-C&G |
| Piling Operations | 2 | CITB-C&G |
| Plastering (Construction) | 1 | CITB-C&G |
| | 2 | CITB-C&G |
| | 3 | CITB-C&G |
| Production of Glass Supporting Fabrications | 2 | GOA |
| Properties Manufacture | 3 | EAL |
| Property and Caretaking Supervision | 3 | ABBE |
| Property Management | 4 | ABBE |
| Provide Energy Efficiency Services | 2 | C&G-NEACT |
| Quantity Surveying Practice | 4 | ABBE |
| Refractory Installations (Construction) | 2 | CITB-C&G |
| Road Safety | 3 | OU-TVG |
| | 4 | OU-TVG |
| Roof Sheeting and Cladding | 2 | CITB-C&G |
| | 3 | CITB-C&G |
| Roof Slating and Tiling | 2 | CITB-C&G |
| | 3 | CITB-C&G |
| Roofing Occupations | 1 | CITB-C&G |
| Set Crafts | 3 | CITB-C&G |
| Site Logistics (Construction) | 2 | CITB-C&G |
| Site Technical Support | 3 | EDEXCEL-CIOB-ICE |
| Spatial Data Management | 4 | ABBE |
| Specialised Plant and Machinery Operations | 1 | CITB-C&G |

| | | |
|---|---|-------------|
| | 1 | QFI |
| | 2 | CITB-C&G |
| | 2 | EPIC |
| | 2 | QFI |
| Specialised Plant and Machinery Operations (Lifting and Transferring) | 2 | C&G |
| Specialist Operations | 3 | CITB-C&G |
| Steel Fixing | 2 | CITB-C&G |
| Stonemasonry | 2 | CITB-C&G |
| | 3 | CITB-C&G |
| Structural Waterproofing (Construction) | 2 | CITB-C&G |
| Surveying Support | 3 | ABBE |
| Technical Design (Built Environment) | 3 | EDEXCEL |
| Thatching | 3 | CITB-C&G |
| Thatching (Construction) | 2 | CITB-C&G |
| Thermal Insulation | 2 | C&G-NJCTICI |
| Town Planning | 4 | ABBE |
| Town Planning Support | 3 | ABBE |
| Traffic Management and Systems Engineering | 4 | OU-TVG |
| Transport Technical Support | 3 | OU-TVG |
| Trowel Occupations (Construction) | 1 | CITB-C&G |
| | 2 | CITB-C&G |
| | 3 | CITB-C&G |
| Tunnelling Operations | 2 | CITB-C&G |
| Underpinning Operations | 1 | CITB-C&G |
| | 2 | CITB-C&G |
| | 3 | CITB-C&G |
| Valuation | 4 | ABBE |
| Wall and Floor Tiling | 2 | CITB-C&G |
| | 3 | CITB-C&G |
| Water Jetting (Construction) | 2 | CITB-C&G |
| Wood Machining (Construction) | 2 | CITB-C&G |
| | 3 | CITB-C&G |
| Wood Occupations (Construction) | 1 | CITB-C&G |
| | 2 | CITB-C&G |
| | 3 | CITB-C&G |
| Wood Preserving - Industrial Pre Treatment (Construction) | 2 | CITB-C&G |

Vocationally Related Qualifications

| Qualification | Type | Level | Awarding Body |
|---|------|-------|---------------|
| AQA Advanced VCE (Double Award) in Construction and the Built Environment | VCE | 3 | AQA |
| AQA Advanced VCE in Construction and the Built Environment | VCE | 3 | AQA |
| AQA Foundation GNVQ in Construction and the Built Environment | GNVQ | 1 | AQA |
| AQA Intermediate GNVQ in Construction and the Built Environment | GNVQ | 2 | AQA |
| EDEXCEL Advanced VCE (Double Award) in Construction and the Built Environment | VCE | 3 | EDEXCEL |

| | | | |
|---|------|---|---------|
| EDEXCEL Advanced VCE in Construction and the Built Environment | VCE | 3 | EDEXCEL |
| EDEXCEL Foundation GNVQ in Construction and the Built Environment | GNVQ | 1 | EDEXCEL |
| EDEXCEL Intermediate GNVQ in Construction and the Built Environment | GNVQ | 2 | EDEXCEL |
| OCR Advanced VCE (Double Award) in Construction and the Built Environment | VCE | 3 | OCR |
| OCR Advanced VCE in Construction and the Built Environment | VCE | 3 | OCR |
| OCR Foundation GNVQ in Construction and the Built Environment | GNVQ | 1 | OCR |
| OCR Intermediate GNVQ in Construction and the Built Environment | GNVQ | 2 | OCR |
| ABBE Level 5 NVQ in Construction Contracts Management | NVQ | 5 | ABBE |
| AQA Advanced VCE (Double Award) in Construction and the Built Environment | VCE | 3 | ABC |
| AQA Advanced VCE in Construction and the Built Environment | VCE | 3 | AQA |
| AQA Foundation GNVQ in Construction and the Built Environment | GNVQ | 1 | AQA |
| AQA Intermediate GNVQ in Construction and the Built Environment | GNVQ | 2 | AQA |
| Building Control | NVQ | 4 | AQA |
| Construction Contracting | NVQ | 4 | AQA |
| Construction Contracting | NVQ | 3 | AQA |
| EDEXCEL Advanced VCE (Double Award) in Construction and the Built Environment | VCE | 3 | AQA |
| EDEXCEL Advanced VCE in Construction and the Built Environment | VCE | 3 | ABBE |
| EDEXCEL Foundation GNVQ in Construction and the Built Environment | GNVQ | 1 | EDEXCEL |
| EDEXCEL Intermediate GNVQ in Construction and the Built Environment | GNVQ | 2 | EDEXCEL |
| OCR Advanced VCE (Double Award) in Construction and the Built Environment | VCE | 3 | OCR |
| OCR Advanced VCE in Construction and the Built Environment | VCE | 3 | OCR |
| OCR Foundation GNVQ in Construction and the Built Environment | GNVQ | 1 | OCR |
| OCR Intermediate GNVQ in Construction and the Built Environment | GNVQ | 2 | OCR |
| Property and Caretaking Supervision | NVQ | 3 | ABBE |
| Property Management | NVQ | 4 | ABBE |
| Quantity Surveying Practice | NVQ | 4 | ABBE |
| Spatial Data Management | NVQ | 4 | ABBE |
| Surveying Support | NVQ | 3 | ABBE |
| Technical Design (Built Environment) | NVQ | 3 | EDEXCEL |
| Town Planning | NVQ | 4 | ABBE |
| Town Planning Support | NVQ | 3 | ABBE |
| Valuation | NVQ | 4 | ABBE |

Appendix 3 – Construction Qualifications Available in and Around Mid Wales

| Qualification Aim | Coleg Ceredigion | Coleg Powys | Coleg Meirion Dwyfor | Ceredigion Training | Pembrokeshire College | Coleg Menai | SCAT | Hereford CT | Count |
|---|------------------|-------------|----------------------|---------------------|-----------------------|-------------|------|-------------|-------|
| Bricklaying NVQ level 2 | | | | * | * | * | | * | 4 |
| Bricklaying NVQ level 3 | | | | * | * | | | * | 3 |
| Carpentry and joinery NVQ level 2 | | | * | | * | | | * | 3 |
| Carpentry and joinery NVQ level 3 | | | * | | * | | | * | 3 |
| Painting & Decorating NVQ 2 | | * | | | * | | | * | 3 |
| Painting & Decorating NVQ 3 | | * | | | * | | | * | 3 |
| Wood Occupations NVQ level 2 | * | * | | | | * | | | 3 |
| Wood Occupations NVQ level 3 | * | * | | | | * | | | 3 |
| Basic Brickwork Skills C&G | * | * | | | | | * | | 3 |
| Basic Woodworking Skills C&G | * | * | | * | | | | | 3 |
| Basic Carpentry and Joinery Skills C&G | * | | | * | | | * | | 3 |
| Basic Bench Joinery C&G | | * | | | | | * | | 2 |
| Brickwork NVQ level 1 | | | * | | | * | | | 2 |
| Brickwork NVQ level 2 | | | * | | | * | | | 2 |
| Brickwork NVQ level 3 | | | * | | | * | | | 2 |
| Carpentry and joinery NVQ level 1 | | | * | | | * | | | 2 |
| Craft mason C&G intermediate construction | | * | | | | * | | | 2 |
| Electrical Installations C&G | | * | | | | | * | | 2 |
| Trowel occupations NVQ level 2 | * | * | | | | | | | 2 |
| Trowel occupations NVQ level 3 | * | * | | | | | | | 2 |
| BTEC national diploma in construction | * | * | | | | | | | 2 |
| Foundation Construction Award C&G | * | | | | | | * | | 2 |
| Advanced Construction Award | | * | | | | | | | 1 |
| AVC DA construction & the built environment | | * | | | | | | | 1 |
| AVC SA construction & the built environment | | * | | | | | | | 1 |
| Basic Painting and Decorating C&G | | * | | | | | | | 1 |
| Basic Brickwork OCN | | | | | | | | * | 1 |
| Basic course in welding | | | * | | | | | | 1 |
| Bench Joinery NVQ 1 | | | | | | | | * | 1 |
| Bench Joinery NVQ 2 | | | | | | | | * | 1 |
| Bench Joinery NVQ 3 | | | | | | | | * | 1 |
| Bricklaying ICA | | | | | * | | | | 1 |
| Bricklaying NVQ 1 | | | | | | | | * | 1 |
| Brickwork C&G intermediate Construction | | | | | | * | | | 1 |
| Brickwork CITB NVQ 2 | | | | | | | * | | 1 |
| BTEC National Cert. in construction | | * | | | | | | | 1 |
| Building studies BTEC HNC | | | | | | * | | | 1 |
| Building Studies BTEC Nat. Cert. | | | | | | | * | | 1 |
| Building studies foundation degree | | | | | | * | | | 1 |
| Building studies HND top up | | | | | | * | | | 1 |
| C & G 6081 Basic brickwork Skills | | | * | | | | | | 1 |
| Carpentry and Joinery CITB NVQ 2 | | | | | | | * | | 1 |
| Carpentry and Joinery CITB NVQ 3 | | | | | | | * | | 1 |
| Carpentry and joinery ICA | | | | | * | | | | 1 |

| | | | | | | | | |
|--|---|--|---|---|---|---|---|---|
| Carpentry OCN | | | | | | | * | 1 |
| Central Heating Boilers A.C.S. | | | | | | | * | 1 |
| Cert. In Plumbing C&G | | | | | | | * | 1 |
| Civil engineering BTEC HNC | | | | | * | | | 1 |
| Construction and the built environment advanced VCE | | | | | * | | | 1 |
| Construction and the built environment GNVO foundation | | | | | * | | | 1 |
| Construction and the built environment GNVO intermediate | | | | | * | | | 1 |
| Construction BTEC Nat. Diploma | | | | | | * | | 1 |
| Construction Crafts & Supplementary Skills | | | | | | | * | 1 |
| Construction national certificate | | | | | * | | | 1 |
| Construction NVQ level 3 | | | | | * | | | 1 |
| Construction Skills for Employment NPTC | | | | | | * | | 1 |
| Cooking Appliances A.C.S. | | | | | | * | | 1 |
| Decorative Techniques OCN | | | | | | | * | 1 |
| Electrical Installation Engineering | | | | | | | * | 1 |
| Electrical Installations NVQ level 2 | | | | | | * | | 1 |
| Electrical installations NVQ level 3 | | | * | | | | | 1 |
| Evening taster course in brickwork | | | * | | | | | 1 |
| Fabrication & Welding Competences Level 2 | * | | | | | | | 1 |
| Fabrication & Welding Competences Level 3 | * | | | | | | | 1 |
| Foundation certificate in Building Craft Operations | * | | | | | | | 1 |
| Foundation certificate plumbing NVQ 2 | | | | * | | | | 1 |
| Foundation certificate plumbing NVQ 3 | | | | * | | | | 1 |
| Foundation certificate plumbing OCN | | | | * | | | | 1 |
| Foundation construction | | | | * | | | | 1 |
| Foundation degree in sustainable architecture | | | | * | | | | 1 |
| Furniture NVQ 2 | | | | | | | * | 1 |
| Furniture Skills & Woodcrafts | | | | | | | * | 1 |
| Gas Core Safety A.C.S. | | | | | | * | | 1 |
| Gas Fires & Wall Heaters A.C.S. | | | | | | * | | 1 |
| Gas water heating appliances ASC | | | | | * | | | 1 |
| HNC architectural technology | | | | * | | | | 1 |
| HNC in computer aided design | | | | * | | | | 1 |
| HND architectural and building conservation. | | | | * | | | | 1 |
| Instantaneous Water Heaters A.C.S. | | | | | | * | | 1 |
| Interior décor OCN | | | | * | | | | 1 |
| Introduction to Furniture Painting | | | | | | | * | 1 |
| Laundry Appliances A.C.S. | | | | | | * | | 1 |
| Mechanical services NVQ 1 | | | | | * | | | 1 |
| Mechanical services NVQ 2 | | | | | * | | | 1 |
| Mechanical services NVQ 3 | | | | | * | | | 1 |
| National cert. Construction & civ. Eng. | | | | * | | | | 1 |
| National diploma in construction & civ. Eng. | | | | * | | | | 1 |
| Painting & Decorating NVQ 1 | | | | | | | * | 1 |
| Painting and Decorating CITB NVQ 2 | | | | | | * | | 1 |
| Painting and decorating ICA | | | | * | | | | 1 |
| Plastering C&G intermediate | | | | | * | | | 1 |
| Plastering NVQ 1 | | | | | * | | | 1 |
| Plastering NVQ 2 | | | | | * | | | 1 |
| Plastering NVQ 3 | | | | | * | | | 1 |
| Plumbing Craft C&G NVQ 2 | | | | | | * | | 1 |
| Plumbing Craft C&G NVQ 3 | | | | | | * | | 1 |
| Plumbing NVQ level 2 | | | * | | | | | 1 |

| | | | | | | | | | |
|--|--|---|--|---|--|---|---|---|---|
| Plumbing NVQ level 3 | | | | * | | | | | 1 |
| Site and bench route C&G intermediate | | | | | | * | | | 1 |
| Site Carpentry & Joinery C&G | | | | | | | * | | 1 |
| Stonemasonry C&G intermediate | | | | | | * | | | 1 |
| Stonemasonry NVQ 2 | | | | | | * | | | 1 |
| Stonemasonry NVQ 3 | | | | | | * | | | 1 |
| Trowel Occupations NVQ level 1 | | | | * | | | | | 1 |
| UFI Learndirect Construction Related Courses | | * | | | | | | | 1 |
| Welding NVQ 2 | | | | | | | | * | 1 |
| Wood trades NVQ level 1 | | | | * | | | | | 1 |
| C & G 6091 Basic Painting and Decorating | | | | | | | | | 0 |
| C & G 6135 Basic Woodworking skills | | | | | | | | | 0 |

Appendix 4 Estyn Inspection Grades for Mid Wales FE Providers in Construction

| FEI | Previous Inspection Cycle | Current Inspection Cycle |
|----------------------|----------------------------------|---------------------------------|
| Coleg Ceredigion | 3 | 3 |
| Coleg Meirion Dwyfor | 2 | 3 |
| Coleg Powys | 2 | 3 |

Key. Grade 2: Good features with no important shortcomings. Grade 3: Good features outweigh shortcomings

Appendix 5 Employer Survey Questionnaire

**B2378 MID WALES CONSTRUCTION SKILLS SURVEY
(21/10/03)**

REVISED QUESTIONNAIRE

RESPONDENT NAME _____

RESPONDENT JOB TITLE _____

COMPANY NAME _____

COMPANY ADDRESS _____

POSTCODE _____

TEL NO. _____

SIZE

1-10 employees **1**

11-24 employees **2**

25+ employees **3**

ASK TO SPEAK TO PERSON RESPONSIBLE FOR TRAINING AND RECRUITMENT AT THAT ADDRESS (PROMPT IF NECESSARY: Managing Director, Owner, Personnel Director, Personnel Manager, Human Resources Manager)

ASK RESPONDENT

Good morning/afternoon. My name is from Beaufort Research. We recently wrote to you regarding a survey we are conducting on behalf of ELWa to identify the future skills needs of the construction industry in Mid Wales.

S1 Can I just check, are you the person with overall responsibility for personnel and training at this location?

Yes

CONTINUE

No

ASK TO SPEAK TO PERSON

RESPONSIBLE

S2 In which unitary authority/county is your business located?

Ceredigion

Powys

Gwynedd – Meirionnydd

CHECK AGAINST SAMPLE LIST &

QUOTAS

Elsewhere

THANK & CLOSE

Would you mind taking part in the study? The interview will take approximately 15 minutes. If it's not convenient to speak to you now, we can call back.

I declare that this interview was conducted within the Code of Conduct of the Market Research Society and that the respondent was unknown to me. I declare that all information given to me must be kept confidential.

Interviewer Sign

Date

Interviewer Print

SECTION A – COMPANY BACKGROUND**ROUTE****READ OUT: Firstly, a few questions about your business**

Q1 How would you describe your business?
(SINGLE CODE)

Bricklayers
 Civil engineers
 Electricians
 Floorers
 General builders
 Glaziers
 Maintenance workers
 Painter & decorators
 Plant mechanics/fitters
 Plasterers
 Plumbers
 Plumbers accredited to work on gas
 Roofers
 Steel erectors/structural fitter
 Wood trades, eg carpentry, joinery

Other (please specify)

Q2

Q2 Which one of the following is your company's main area of activity?
(READ OUT - SINGLE CODE)

Repair & Maintenance
 House building
 Restoration
 Infrastructure/Civil Engineering
 Industrial/Commercial
 Other (please specify)

Q3

Q3 Do you work mainly in the private or the public sector?

(SINGLE CODE)

- Mainly private sector
- Mainly public sector
- Both equally
- Don't know

Q4

Q4 Is the business at this location..?

(READ OUT – SINGLE CODE)

0

- A single proprietorship / sole trader
- A partnership
- A private limited company
- A public limited company
- An in-house public sector organisation

1

2

3

4

5

Something else (PLEASE SPECIFY)

Q5

Q5 And is the business at this location..?

(READ OUT – SINGLE CODE)

0

Independent

1

of a larger group

Part
2

Q6

ROUTE

Q6 Are the major decisions regarding the recruitment and training of staff taken at this location or elsewhere? **(SINGLE CODE)**

0

- At this location
- At another location that is not your Head Office
- At Head Office
- Depends
- Don't know

1

2

3

4

5

Q7

SECTION B – YOUR WORKFORCE

READ OUT: I'd now like to ask you some questions about your workforce.

Q7 How many **permanent** staff, including yourself and any unpaid staff, do you employ in total? Can I remind you that all responses are completely confidential and results will be anonymous.
(WRITE IN NUMBER BELOW)

Q8

Q8 In which occupations are they employed?
(RECORD NUMBER EMPLOYED IN EACH OCCUPATION BELOW – ENSURE TOTAL EQUALS NUMBER GIVEN AT Q7)

INSTRUCTION

INSTRUCTION: FOR EACH OCCUPATION LISTED, ASK Q9-Q11. IF DON'T KNOW, SKIP TO Q12

Q9 Are they qualified or skilled employees or are they trainees or apprentices who are not yet qualified?
(RECORD NUMBER OF QUALIFIED/SKILLED EMPLOYEES AND TRAINEES/APPRENTICES IN EACH OCCUPATION BELOW)

| | Q8 | Q9 | |
|--|---|----------------------------------|--------------------------------------|
| | Nos. Employed in Each Occupation | Nos. of Skilled/Qualified | Nos. of Trainees/ Apprentices |
| Managers | | | |
| Clerical Staff | | | |
| Professional Staff | | | |
| Technicians | | | |
| Skilled general builders | | | |
| Unskilled general operatives / labourers | | | |
| Wood trades | | | |
| Bricklayers | | | |
| Painters | | | |
| Plasterers | | | |
| Roofers | | | |
| Floorers | | | |
| Glaziers | | | |
| Other specialist operatives | | | |
| Plant mechanics / fitters | | | |
| Steel erectors / structural fitters | | | |

| | | | |
|---|--|--|--|
| Other civil engineering operatives | | | |
| <i>Maintenance workers</i> | | | |
| <i>Electricians</i> | | | |
| <i>Plumbers</i> | | | |
| <i>Plumbers accredited to work on gas</i> | | | |
| <i>Non-construction operatives</i> | | | |
| Other (please specify) | | | |
| None | | | |
| Don't know | | | |

ROUTE

Q10 Has the number of permanent (OCCUPATION 1) increased, decreased, or stayed the same in the last few years? **(SINGLE CODE)**

Q11 Over the next 12 months, do you expect the number of permanent staff employed in this occupation to increase, decrease or stay the same? **(SINGLE CODE)**

Q12

| | Q10 | | | | Q11 | | | |
|--|-----------------------|-------|------|----|----------------------|------|------|----|
| | How Nos. Have Changed | | | | How Nos. Will Change | | | |
| | Inc'd | Dec'd | Same | DK | Inc | Dec. | Same | DK |
| Managers | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |
| Clerical Staff | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |
| Professional Staff | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |
| Technicians | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |
| Skilled general builders | | | | | | | | |
| Unskilled general operatives / labourers | | | | | | | | |
| Wood trades | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |
| Bricklayers | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |
| Painters | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |
| Plasterers | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |
| Roofers | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |
| Floorers | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |
| Glaziers | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |
| Other specialist operatives | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| Plant mechanics / fitters | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |
| Steel erectors / structural fitters | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |
| Other civil engineering operatives | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |
| <i>General operatives / labourers</i> | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |
| <i>Maintenance workers</i> | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |
| <i>Electricians</i> | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |
| <i>Plumbers</i> | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |
| <i>Plumbers accredited to work on gas</i> | | | | | | | | |
| <i>Non-construction operatives</i> | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |
| Other (please specify) | | | | | | | | |
| None | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |

Q12 During the past 12 months, have you used any self-employed or sub-contract labour? ()

| | | |
|------------|---|----------------|
| Yes | 1 | Q13 |
| No | 2 | |
| Don't know | 3 | SECTION |

Q13 How many self-employed or subcontract staff have you used in total during this period?
(WRITE IN NUMBER BELOW)

_____ **Q14**

Q14 In which occupations are they/were they employed?
(RECORD NUMBER EMPLOYED IN EACH OCCUPATION BELOW – ENSURE TOTAL EQUALS NUMBER GIVEN AT Q13)

Q15

ROUTE

| | |
|---|--|
| | Q14 |
| | Nos. Self-Employed or Sub-Contract Labour Employed in Each Occupation |
| Managers | |
| Clerical Staff | |
| Professional Staff | |
| Technicians | |
| Skilled general builders | |
| Unskilled general operatives / labourers | |
| Wood trades | |
| Bricklayers | |
| Painters | |
| Plasterers | |
| Roofers | |
| Floorers | |
| Glaziers | |
| Other specialist operatives | |
| Plant mechanics / fitters | |
| Steel erectors / structural fitters | |
| Other civil engineering operatives | |
| <i>Maintenance workers</i> | |
| <i>Electricians</i> | |
| <i>Plumbers</i> | |
| <i>Plumbers accredited to work on gas</i> | |
| <i>Non-construction operatives</i> | |
| Other (please specify) | |
| None | |
| Don't know | |

Q15 During the next 12 months, do you expect to use more or fewer self-employed staff or sub-contract labour?

More

Fewer
 No change
 Don't know

Q16

SECTION C – RECRUITMENT

READ OUT: I'd now like to ask some questions about recruitment.

Q16 When you are recruiting new staff, which of the following means of advertising jobs or finding people do you ever use? **(READ OUT – CAN MULTICODE)**

Job Centre Plus
 Local newspapers
 Employment agencies
 Links with schools/colleges
 Personal recommendation/word of mouth
 Speculative applications
 Other (please specify)

Don't know
 None

Q17

Q17 Have you recruited any **permanent** staff during the past 12 months?

(IF BUSINESS STARTED UP DURING LAST 12 MONTHS, ALL STAFF COUNT AS NEWLY RECRUITED)

| | |
|------------|----|
| | () |
| Yes | 1 |
| Don't know | 3 |

Q18

Q18 Do you currently have any vacancies for staff, either permanent, casual or sub-contract?

()

| | |
|------------|---|
| Yes | 1 |
| No | 2 |
| Don't know | 3 |

Q19

Q19 Are you currently experiencing, or have you experienced over the past 12 months, any difficulty in filling any vacancies?

()

| | |
|------------|---|
| Yes | 1 |
| No | 2 |
| Don't know | 3 |

Q20

Q24

Q20 In what type of vacancy or vacancies have you experienced difficulty?
(READ OUT – CAN MULTICODE)

| | | |
|-------------------------------------|---|----|
| Permanent full-time staff | 1 | () |
| Permanent part-time staff | 1 | () |
| Casual or seasonal staff | 1 | () |
| Self-employed or sub-contract staff | 1 | () |
| Don't know | 1 | () |

Q21

Q21 In which occupation/s have you experienced difficulty? **PROBE:** Any others?
(CAN MULTICODE)

- Managers
- Clerical staff
- Professional staff
- Technicians
- Skilled general builders
- Unskilled general operatives / labourers
- Wood Trades, eg carpenters, joiners
- Bricklayers
- Painters
- Plasterers
- Roofers
- Floorers

-
- Glaziers
 - Other specialist operatives
 - Plant mechanics / fitters
 - Steel erectors / structural fitters
 - Other civil engineering operatives
 - Maintenance workers
 - Electricians
 - Plumbers
 - Plumbers accredited to work on gas
 - Non-construction operatives

Other (PLEASE SPECIFY)

Q22

Q22 Why has this vacancy/have these vacancies proved hard to fill? **PROMPT** Anything else?
(DO NOT PROMPT – CAN MULTICODE; CODE ALL MENTIONED)

| | | |
|--|---|---|
| Lack of applicants with required qualifications | 1 | 0 |
| Lack of applicants with required skills | 1 | 0 |
| Lack of applicants with required personal & social qualities | 1 | 0 |
| Lack of applicants with required working experience | 1 | 0 |

Q23

| | | |
|--|---|---|
| Lack of applicants with Welsh language skills | 1 | 0 |
| Lack of applicants interested in this type of work | 1 | 0 |
| Job entails shift work/unsociable hours | 1 | 0 |
| Lack of promotion opportunities | 1 | 0 |
| Higher wages/salaries offered by other employers | 1 | 0 |
| Potential applicants have poor perception of this area | 1 | 0 |
| Remote location/poor public transport | 1 | 0 |
| People reluctant to relocate to this area | 1 | 0 |
| High cost/lack of accommodation | 1 | 0 |
| General lack of applicants | 1 | 0 |

Don't know 1 0

Other (PLEASE SPECIFY)

0 0

0 0

Q24

Q23 What particular skills, qualifications or experience did applicants for this vacancy lack?

(DO NOT PROMPT – CAN MULTICODE)

| | | | |
|--------------------------------|---|---|------------|
| Ability to follow instructions | 1 | 0 | |
| Communication skills | 1 | 0 | |
| Customer care | 1 | 0 | |
| Flexibility | 1 | 0 | |
| Health & Safety | 1 | 0 | |
| Initiative | 1 | 0 | |
| Multi-Skilling | 1 | 0 | |
| Practical Ability | 1 | 0 | |
| Technical Skills | 1 | 0 | |
| ICT | 1 | 0 | |
| NVQ 2 | 1 | 0 | |
| NVQ 3 | 1 | 0 | |
| CSCS | 1 | 0 | |
| Modern Apprenticeship | 1 | 0 | |
| Welsh language skills | | | |
| Don't know | 1 | 0 | |
| Other (PLEASE SPECIFY) | | | |
| _____ | 0 | 0 | |
| _____ | 0 | 0 | Q24 |

SECTION D – SKILLS

READ OUT: Now, some questions about skills.

Q24 Thinking about your workforce generally, is there a gap between the skills of current employees and sub-contract staff and those your organisation needs to meet its business requirements now or in the near future?

| | | |
|------------|---|------------|
| | 0 | |
| Yes | 1 | Q25 |
| No | 2 | |
| Don't know | 3 | Q27 |

ROUTE

Q25 In which occupation/s is there a skills gap?
(CAN MULTICODE)

- Managers
- Clerical staff
- Professional staff
- Technicians
- Skilled general builders
- Unskilled general operatives / labourers
- Wood Trades, eg carpenters, joiners
- Bricklayers
- Painters
- Plasterers
- Roofers
- Floorers

-
- Glaziers
 - Other specialist operatives
 - Plant mechanics / fitters
 - Steel erectors / structural fitters
 - Other civil engineering operatives
 - Maintenance workers
 - Electricians
 - Plumbers
 - Plumbers accredited to work on gas
 - Non-construction operatives

Other (PLEASE SPECIFY)

Q26

Q26 What particular skills, qualifications or experience are lacking? **PROBE:** Any others?
(DO NOT PROMPT – CAN MULTICODE)

| | | |
|--------------------------------|---|---|
| Ability to follow instructions | 1 | 0 |
| Communication skills | 1 | 0 |
| Customer care | 1 | 0 |
| Flexibility | 1 | 0 |
| Health & Safety | 1 | 0 |
| Initiative | 1 | 0 |
| Language skills | 1 | 0 |
| Multi-Skilling | 1 | 0 |
| Practical Ability | 1 | 0 |
| Technical Skills | 1 | 0 |
| ICT | 1 | 0 |
| NVQ 2 | 1 | 0 |
| NVQ 3 | 1 | 0 |
| CSCS | 1 | 0 |
| Modern Apprenticeship | 1 | 0 |
| Welsh language skills | | |
| Don't know | 1 | 0 |
| Other (PLEASE SPECIFY) | | |
| | 0 | 0 |

Q27

SECTION E – TRAINING

READ OUT: Lastly, a few questions about training.

Q27 Does your company have a training plan?

| | | |
|----------------------|---|------------|
| (SINGLE CODE) | 0 | |
| Yes | 1 | |
| No | 2 | |
| Don't know | 3 | Q28 |

Q28 Approximately what proportion of your employees have been involved in training and development activities that were funded or arranged by your company in the last year? **(SINGLE CODE)**

| | | |
|---------------|---|------------|
| | 0 | |
| None | 1 | |
| 25% - 49% | 3 | |
| 50% - 74% | 4 | |
| 75% - 99% | 5 | |
| All employees | 6 | |
| Don't know | 7 | Q29 |

Q29 And around what proportion of your sub-contract and self-employed staff have been involved in training and development activities that were funded or arranged by your company in the last year? **(SINGLE CODE)**

| | | |
|---------------|---|--|
| None | 1 | |
| Less than 25% | 2 | |
| 25% - 49% | 3 | |
| 50% - 74% | 4 | |
| 75% - 99% | 5 | |
| All employees | 6 | |
| Don't know | 7 | |

INSTRUCTION

INSTRUCTION: REFER BACK TO Q28 – IF NONE (CODE 1) OR DON'T KNOW (CODE 7) SKIP TO Q35; ALL OTHERS, CONTINUE

Q30 What type of training did your employees undertake over the past year? Was it...?

| | | | |
|-----------------------------------|---|---|--------------|
| (READ OUT – CAN MULTICODE) | | | |
| On-the-job | 1 | 0 | Q34 |
| Off-the-job | | 1 | 0 Q35 |

Q31 Was this training mostly run by..?

(READ OUT – SINGLE CODE)

0

A member of staff

1

Q33

An external training provider, that is a college or a training company

2

Both equally

3

Q32

Don't know

4

INSTRUCTION ABOVE Q34

Q32 Is/are the training provider/s you usually use based locally (that is within 25 miles or so) or further afield?

Local

Further afield

Don't know

Q33

Q33 Which of the following types of courses has your company used in the last 12 months or so?

(READ OUT – CAN MULTICODE)

Distance learning

1

0

Short courses

1

0

Full-time courses

1

0

Part-time courses

1

0

Other (PLEASE SPECIFY)

0

0

0

0

INSTRUCTION

INSTRUCTION: IF ON-THE-JOB ALSO CODED AT Q30 ASK Q34; IF NOT, GO TO Q35

Q34 Was this training mostly run by..? **(READ OUT – SINGLE CODE)**

0

A member of staff

1

An external training provider, that is a college or a training company

2

Both equally

3

| | | |
|--|---|------------|
| An OSAT (On Site Assessment Test) Centre | 4 | |
| Don't know | 5 | Q35 |

Q35 What months of the year, if any, are particularly convenient for staff to undertake training, to minimise any disruption to your business? **(CAN MULTICODE)**

| | | | |
|------------|---|---|------------|
| January | 1 | 0 | |
| February | 1 | 0 | |
| March | 1 | 0 | |
| April | 1 | 0 | |
| May | 1 | 0 | |
| June | 1 | 0 | |
| July | 1 | 0 | |
| August | 1 | 0 | |
| September | 1 | 0 | |
| October | 1 | 0 | |
| November | 1 | 0 | |
| December | 1 | 0 | |
| None | 1 | 0 | |
| Don't know | 1 | 0 | Q36 |

Q36 Are there any factors which limit or present a barrier to the amount of training your organisation does? **(DO NOT PROMPT – CAN MULTICODE)**

| | | | |
|--|---|---|--|
| Cost of training in local area | 1 | 0 | |
| Quality of training offered by providers | 1 | 0 | |
| The times of day at which courses are run in local area or providers are prepared to train | 1 | 0 | |
| Do not have experienced staff to deliver training | 1 | 0 | |
| Cannot afford staff to have time off for training | 1 | 0 | |
| No one in company is skilled at identifying staff's training needs | 1 | 0 | |
| Concerns over trained staff taking jobs in other companies | 1 | 0 | |
| No one in company is skilled at buying in training | 1 | 0 | |
| Have never been able to prove benefits of training to the business | 1 | 0 | |
| Cannot find the training needed in the local area | 1 | 0 | |
| Staff are not interested in training or developing their skills | 1 | 0 | |
| Training courses take too long to complete | 1 | 0 | |

| | | | |
|--|---|---|------------|
| None of the above – training is adequate | 1 | 0 | |
| Don't know | 1 | 0 | |
| Other (PLEASE SPECIFY) | 0 | 0 | Q37 |

Q37 How much would you say you know about the following: - a great deal, a fair amount, a little or nothing ?

Q38

| READ OUT | A great deal | A fair amount | A little | Nothing | Don't know | |
|--|--------------|---------------|----------|---------|------------|---|
| NVQs (National Vocational Qualifications) | 1 | 2 | 3 | 4 | 5 | 0 |
| CSCS (Certificate of Safety on Construction Sites) | 1 | 2 | 3 | 4 | 5 | 0 |
| Modern Apprenticeships | 1 | 2 | 3 | 4 | 5 | 0 |
| OSAT (On-Site Assessment Tests) | 1 | 2 | 3 | 4 | 5 | 0 |

Q38 Which, if any, has your organisation ever used?
(READ OUT – CAN MULTICODE)

| | | | |
|--|---|---|------------|
| National Vocational Qualifications (NVQs) | 1 | 0 | |
| CSCS (Certificate of Safety on Construction Sites) | 1 | 0 | |
| Modern Apprenticeships | 1 | 0 | |
| OSAT (On-Site Assessment Tests) | 1 | 0 | |
| None | 1 | 0 | |
| Don't know | 1 | 0 | Q39 |

READ OUT: finally, some questions about your markets

Q39 Where are your main customers located?
(READ OUT – SINGLE CODE)

| | | |
|------------------------------|---|------------|
| Within 10 miles of your base | 1 | |
| Within 25 miles of your base | 2 | |
| Mid Wales | 3 | |
| Wales wide | 4 | |
| UK wide | 5 | Q40 |
| Other (please specify) | | |
| <hr/> | | |
| Don't know | | |

Q40 Over the next 12 months, would you say that the market is likely to: **(READ OUT – SINGLE CODE)**

| | |
|------------------|---|
| Grow rapidly | 1 |
| Grow a little | 2 |
| Stay the same | 3 |
| Decline a little | 4 |
| Decline rapidly | 5 |
| Don't Know | 6 |

Q41

Q41 Finally, what approximately is the current annual turnover of this business at this location?
(SINGLE CODE - PROMPT IF NECESSARY WITH SIZE BANDS) ()

| | |
|-------------------------------|---|
| Less than £100,000 per annum | 1 |
| £101,000 - £250,000 per annum | 2 |
| £250,001 - £500,000 per annum | 3 |
| Over £500,000 per annum | 4 |
| Refused | 5 |
| Don't know | 6 |

THANK AND CLOSE
