



# Monthly Labour Market Report

## Welcome

The Monthly Labour Market Report from the Learning and Skills Observatory Wales (LSO) aims to provide the main headlines on the Welsh labour market and is based on the latest data available.

This month's issue puts the spotlight on **Employer Investment in Skills**.

This report was produced by the Centre for Economic and Social Inclusion (known as *Inclusion*), commissioned by Welsh Government to blend Wales's available labour market information (LMI) (from the various sources) and produce a monthly analysis. Whilst the report is owned by Welsh Government it is not validated in terms of its specific content or interpretation.

*Inclusion* has an unrivalled understanding of the labour market based on over 28 years of experience of working with the range of stakeholders involved in delivering employment and skills services. We collect and analyse both national and local labour market data through our well developed Local Labour Market Information System, conduct research on employment and skills issues at the local level, run events that bring together policymakers and providers in the skills and employment sector, and produce weekly e-briefings that summarise what is new in employment and skills for our subscribers.

We currently supply monthly employment and skills data to the Greater London Authority, as well as providing labour market tools and analysis for Greater Manchester.

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# Latest labour market trends

## Employment

Employment data from the Labour Force Survey (LFS) – estimates published by the Office for National Statistics (ONS) obtained from a large sample quarterly rolling survey of households – show that Wales performed less well than all the other UK nations and all of the English regions in the rolling quarter February-April 2014. However, the relative performance of Wales in the first quarter of the year looks much better on the ONS's alternative (and largely employer survey based) Workforce Jobs measure.

The (seasonally adjusted) Labour Force Survey estimate of the number of people aged 16 and over in employment in Wales fell by 17,000 (-1.2%) compared to the previous quarter (November 2013-January 2014) to a total of 1.373 million. The quarterly net fall in employment in Wales is comprised entirely of a fall in the number of men in employment. Male employment fell by 22,000 (-3.0%) to 710,000 while female employment increased by 5,000 (0.8%) to 663,000.

The total quarterly fall in employment in Wales contrasts with a corresponding increase in total UK employment of 345,000 (+1.1%). In contrast to the fall in Wales, employment increased by 330,000 (+1.3%) in England, by 16,000 (+0.6%) in Scotland and by 15,000 (+1.8%) in Northern Ireland. The net increase in England comprised an increase in employment in the North East (15,000, +1.2%), the North West (46,000, +1.5%), Yorkshire and Humberside (36,000, +1.4%), the East Midlands (39,000, +1.8%) the West Midlands (24,000, +1.0%), the East of England (27,000, +0.9%), London (73,000, +1.8%), the South East (13,000, +0.3%) and the South West (59,000, +2.3%).

The working age employment rate for Wales (i.e. the proportion of the population aged 16-64 in employment) fell by 1.0 percentage points in the quarter to 70.1%. This compares with an increase of 0.7 percentage points in England, 0.5 percentage points in Scotland and 0.5 percentage points in Northern Ireland. The employment rate in Wales is 2.8 percentage points lower than the UK average (72.9%) and lower than the employment rate in both England (73.2%) and Scotland (73.4%) but higher than the rate in Northern Ireland (68.1%).

The Office for National Statistics commented as follows on the quarterly fall in employment in Wales:

“The latest estimates for Wales have been below the record high levels recorded toward the end of last year and start of this year, but are still higher than the levels reported for a year ago.”

Each calendar quarter the ONS also publishes an estimate of jobs in the economy which complements the LFS estimate of the number of people in employment. The (seasonally adjusted) Workforce Jobs estimate is obtained from a combination of employer surveys and administrative data in addition to the LFS. The number of jobs in the economy will not necessarily equal the number of people in employment given that some people will hold more than one job. The LFS and Workforce Jobs estimates can also differ because of differences in the method of obtaining the respective estimates.

The latest Workforce Jobs estimate shows that there were 1.415 million jobs in Wales as of March 2014, 44,000 (+3.2%) more jobs than in December 2013. This compares with a quarterly increase of 325,000 (+1.2%) in England, 1,000 (+0.04%) in Scotland and 9,000 (+1.1%) in Northern Ireland. By contrast with LFS, the Workforce Jobs measure of employment thus suggests a relatively strong jobs performance in Wales at the start of 2014. A breakdown of the latest quarterly percentage change in Workforce Jobs for both Wales and the UK is shown in table 1.

**Table 1 Percentage changes in Workforce Jobs by main industrial sector, Wales and UK average, quarter to March 2014 (seasonally adjusted)**

	Wales – quarterly % change	UK – quarterly % change
Agriculture, forestry and fishing	+15.8%	+9.1%
Mining and quarrying	-2.1%	-7.1%
Manufacturing	+0.3%	+0.4%
Electricity, gas, steam conditioning and air supply	+1.0%	-0.4%
Water supply, sewerage, wastes and remediation activities	-4.0%	-0.5%
Construction	+2.3%	+0.7%
Total services	+3.4%	+1.2%
All jobs	+3.2%	+1.2%

Source: ONS

### Unemployment and economic inactivity

The number of people in Wales who are unemployed on the International Labour Organisation (ILO) Labour Force Survey definition fell by 3,000 to 97,000 between the quarters November 2013-January 2014 and February-April 2014. Total unemployment also fell by 147,000 in England, by 7,000 in Scotland and by 4,000 in Northern Ireland.

The quarterly fall in unemployment in Wales occurred despite the corresponding 17,000 fall in the number of people in employment because of an offsetting decrease of 19,000 in the number of people active in the labour market. Moreover there was divergence in the change in unemployment by gender. The number of unemployed men increased by 5,000 (+9.6%) to 62,000 while the number of unemployed women fell by 8,000 (-19.3%) to 35,000.

The ILO unemployment rate in Wales fell by 0.1 percentage points to 6.6% in the quarter. The UK average rate of ILO unemployment fell by 0.5 percentage points to 6.6%. The unemployment rate in Wales was equal to that in both England and in Scotland (6.6%) but lower than in Northern Ireland (6.9%). Within England, the North East (9.8%), the North West (7.6%), Yorkshire and Humberside (8.2%), the West Midlands (7.5%), and London (7.5%) had a higher unemployment rate than Wales. South East England (4.8%), the East of England (5.3%) and South West England (4.9%) had the lowest unemployment rates.

The administrative count of people unemployed and claiming Jobseeker's Allowance (JSA) is somewhat lower (60,100 in Wales in May 2014, a JSA claimant count rate of 4.2%) than ILO unemployment because non-JSA claimant jobseekers are excluded. The number of JSA claimants in Wales decreased by 1,200 between April and May 2014. However care should be taken in interpreting change in the claimant count since this can be influenced by changes to the benefit system as well as underlying change in the labour market.

The number of economically inactive people of working age in Wales increased by 20,000 between the quarters November 2013-January 2014 and February-April 2014. As the LMI scorecard shows the working age rate of economic inactivity in Wales (24.8%) is 3 percentage points higher than the UK average (21.8%).

Within the UK nations and regions only Northern Ireland (26.7%) had a higher inactivity rate than Wales in the quarter February-April 2014. The lowest inactivity rates are in the South East (19.7%) and the East of England (19.7%).

## LMI scorecard

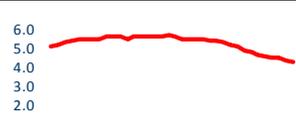
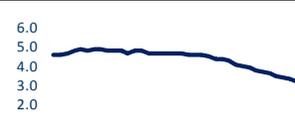
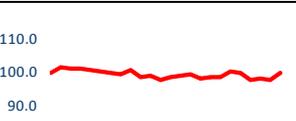
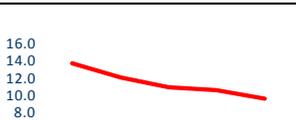
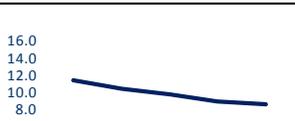
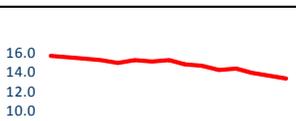
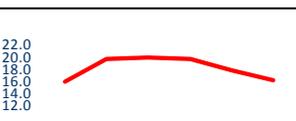
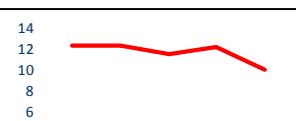
The scorecard presents recent trends and figures for a number of core labour market indicators, using a variety of different sources:

	Source
Working age employment rate	1
Working age male employment rate	1
Working age female employment rate	1
ILO unemployment rate 16+	1
Claimant count as a proportion of the working age population	2
Working age economic inactivity	1
Index of workforce jobs	3
Proportion of the working age population with no qualifications	4
Proportion of the working age population qualified to NQF4+	4
Proportion of the working age population who claim out of work benefits	5
Children living in workless households	6
Proportion of 16–18 year olds who are not in employment, education or training	7

- 1 LFS, ONS: subject to sampling variability and should be used with caution
- 2 Claimant count seasonally adjusted, NOMIS: trends can be affected by changes to benefit rules
- 3 Employer surveys, household surveys and administrative sources, ONS
- 4 Annual Population Survey/Annual Local LFS, ONS. Data is subject to sampling variability and should be used with caution.
- 5 Department for Work and Pensions, NOMIS
- 6 Household LFS, ONS: subject to sampling variability and should be used with caution
- 7 Source: ONS, Higher Education Statistics Agency, Welsh Government Lifelong Learning Wales Record, Pupil Level Annual School Census, Annual Population Survey.

# LMI Scorecard

June 2014

		Wales		Difference between Wales and National (latest figures): Better Worse	NATIONAL (UK or GB depending on indicator)	
		Trend (Three to four years)	Latest result & trend		Latest result & trend	Trend (Three to four years)
Supply of Labour	Working age employment rate (%)		70.1% ↑	-2.8 Charts cover: Feb-Apr 11 to Feb-Apr 14	72.9% ↑	
	Working age male employment rate (%)		72.9% ↓	-5.0 Charts cover: Feb-Apr 11 to Feb-Apr 14	77.9% ↑	
	Working age female employment rate (%)		67.2% ↑	-0.6 Charts cover: Feb-Apr 11 to Feb-Apr 14	67.9% ↑	
	ILO Unemployment rate 16+ (%)		6.6% ↓	0.0 Charts cover: Feb-Apr 11 to Feb-Apr 14	6.6% ↓	
	Claimant Count as a proportion of the workforce, seasonally adjusted (%)		4.2% ↓	1.0 Charts cover: May 11 to May 14	3.2% ↓	
	Working age economic inactivity (%)		24.8% ↑	3.0 Charts cover: Feb-Apr 11 to Feb-Apr 14	21.8% ↓	
Demand	Index of workforce jobs. 2008 Q1=100		103.0% ↑	0.0 Charts cover: 2008 Q1 to 2014 Q1	103.0% ↑	
Skill gaps	Proportion of the working age population with no qualifications (%)		9.7% ↓	1.0 Charts cover: Year to Dec 09 to year to Dec 13	8.7% ↓	
	Proportion of the working age population qualified to NQF4+ (%)		33.6% ↑	-4.0 Charts cover: Year to Dec 09 to year to Dec 13	37.6% ↑	
Worklessness & NEETS	Proportion of the working age population who claim out of work benefits		13.4% ↓	2.8 Charts cover: May 10 to Nov 13	10.6% ↓	
	Children living in workless households (%)		16.1% ↓	2.9 Charts cover: Oct-Dec 2008 to Oct-Dec 2013	13.3% ↓	
	Proportion of 16-18 year olds who are NEET (%)		10% ↓	0.5 Charts cover: 2008 to 2012	10% England ↔	

## Employer Investment in Skills

### Introduction

The importance of having a highly skilled workforce to maintain a competitive economy has never been higher. While the Welsh Government continues to invest heavily in education and skills provision, employers in Wales invest less in training than those in the other UK countries. The Welsh Government launched its policy statement on skills in January 2014, which outlined a number of funding principles for post-19 skills delivery built upon the concept of co-investment between government, employers and, in some cases, individuals. A consultation about how co-investment might be implemented in Wales closed in May 2014<sup>1</sup>.

This month's report focuses on the benefits to employers of investing in skills, and why it is advantageous for them to take more responsibility for developing the skills and competencies of their own workforce that are needed in a global economy.

### Welsh Employer Investment in Skills

Table 1 shows that employers in Wales invested around £1.6 billion on staff training in 2013, up from £1.5 billion in 2011 (at the time of the last UKCES employer skills survey). This investment paid for 5.6 million days of training, up from 4.9 million in 2011 for a total of 724,000 members of staff, of whom around 200,000 trained towards a nationally recognised qualification. This represented 62% of the total workforce employed in Wales, in line with the UK average.

In terms of days per person trained and per employee, Wales has seen an increase between 2011 and 2013, whereas the UK as a whole has seen a fall. However, despite Welsh employers increasing their total investment in skills training, the amount spent per person trained and per employee remains lower than the UK average. Training spend per employee was 85% of the UK average in 2013, although the gap has closed somewhat between 2011 and 2013, when it was just 76% of the UK average.

**Table 1: Investment in Training, Wales vs UK, 2011 and 2013**

Training Activity	Wales		UK	
	2011	2013	2011	2013
Total training days	4.9m	5.6m	114.6m	113.2m
Days per person trained	7.5	7.7	7.8	6.7
Days per employee	4.2	4.8	4.2	4.2
Total Spend	£1.5bn	£1.6bn	£45.3bn	£42.9bn
Spend per person trained	£2,280	£2,180	£3,080	£2,550
Spend per employee	£1,280	£1,350	£1,680	£1,590

Source: *Employer Skills Survey Wales Report, Tables 5.3 and 5.5*

### Barriers to employers providing training

Across Wales, only 62% of employers had arranged training for any of their staff in the 12 months prior to the 2013 survey, the lowest level of the UK nations. In terms of the reasons given for why employers had

<sup>1</sup> <http://wales.gov.uk/consultations/education/proposals-for-co-investment-in-post-19-adult-skills-delivery/?lang=en>

not provided training, Welsh responses were in line with the rest of the UK, and the most common reasons were as follows:

• All our staff are fully proficient / no need for training	68% <sup>2</sup>
• No money available for training	10%
• Training is not a priority for the establishment	10%
• No training available in relevant subject area	5%
• Managers have lacked the time to organise training	3%
• Employees are too busy to undertake training	3%
• Employees are too busy to give training	3%
• External courses are too expensive	1%
• Learn by experience/as you go	1%
• Business not operating long enough/New business	1%
• Small firm/training not needed due to size of establishment	1%
• Trained staff will be poached by other employers	1%
• Courses interested in not available	1%
• No particular reason	3%

In addition, half of those employers who had provided training would have liked to provide more training if they could. The main barriers to providing more training were:

• Lack of funds/ training expensive	62% <sup>3</sup>
• Can't spare time for employees to be training	51%
• Hard to find time to organise training	15%
• Difficulty finding provider to deliver where and when we want	6%
• Lack appropriate training / qualifications in the subjects we need	4%

## Benefits of Employer Investment in Skills

Supporters of employer investment in skills highlight a number of improvements to businesses that fully engage with workforce development. Taking the Investors in People standard, the Welsh Government

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<sup>2</sup> % of employers who had not provided any training in last 12 months

<sup>3</sup> % of employers who would have liked to provide more training

states that 'employers today see a number of real business benefits in connecting with their workforce through working with Investors in People'<sup>4</sup> :

- Improved service delivery and business performance
- Focus and structure when going through organisational change
- Improved employee engagement and performance
- Business development and growth
- Return on investment through increased efficiency and profitability.

The CBI hold a similar view on the importance of skills to growth and competitiveness:

*'In a global market, the UK must push ahead in high skill, high value sectors, and employers know they must take responsibility for continuing to invest in the training and development of their staff. Increasing skills will be crucial to achieving growth in the short and medium term by boosting business competitiveness and developing an attractive skills base for investors.'*<sup>5</sup>

### **The links between skills and productivity**

According to a review of research by UKCES<sup>6</sup>, 'researchers have attempted to identify whether higher skill levels among the workforce contribute to the success of business and improved performance of the economy. Overall, the relationship is considered a positive one'. Since 2001 the Treasury have focused on workforce skills alongside innovation, enterprise, investment and competition as the five drivers of productivity.

In terms of impact on company performance, the UKCES Almanac states that:

*'Using productivity as a proxy for organisational performance, top performing manufacturing companies were associated with a workforce with, on average, an extra qualification level (a proxy for skills) than the workforce of bottom performing companies, and also noted those in the UK's top 10% of productive firms had workers with on average 2 years additional education than firms in the bottom 10%. This skill difference accounted for around 8% of the productivity gap between the top and bottom 10% of firms. This is explained by the higher level of skills within these high performing manufacturing companies which leads to innovation and more sophisticated production processes, in turn leading to higher quality and higher value products.'*

The UKCES also cite a range of studies going back to the late 1980s and 1990s by the National Institute for Economic and Social Research (NIESR) on the links between skills and productivity. These studies consistently showed 'a clear connection between higher skills and higher productivity was identified, particularly at the intermediate level of skills. All the studies found that the higher than average labour productivity levels elsewhere in Europe were related to higher skills and levels of knowledge.' In a

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<sup>4</sup> <http://wales.gov.uk/topics/educationandskills/skillsandtraining/investorsinpeople/?lang=en>

<sup>5</sup> CBI (2011) Business Investment in Skills

<sup>6</sup> UKCES Almanac Online  
<https://almanac.ukces.org.uk/productivity/What%20is%20the%20impact%20of%20productivity%20on%20company%20perf/Forms/AllItems.aspx>

comparison of automotive sectors in different countries, it was reported that value added per employee was 15%-25% higher in Germany than in the UK, due to significant differences in investment in human capital and levels of qualification.

The UKCES review goes on to highlight from other published research:

- Half of businesses felt that the training they provide increased their profit margins.
- Data from the Skills for Business Survey of employers showed that the second most common benefit of training, given by a quarter of respondents, was improved labour productivity.
- Around two thirds of employers in England that provided training for their employees over the previous 12 months attributed an increase in productivity to that training.

The link between higher productivity and skills is not restricted to developed economies. A World Bank study of skills in developing economies<sup>7</sup> found that:

*'Skills are at the core of improving individuals' employment outcomes and increasing countries' productivity and growth. This is particularly relevant as today's developing and emerging countries seek higher sustained growth rates.'*

*'As countries become richer and move up the value-added chain, the skills demanded will change. Bottlenecks will become more evident, constraining growth. Increasingly, labour productivity will depend on high-level cognitive skills (such as analysis, problem solving, and communication) and behavioural skills (such as discipline and work effort). These higher productivity skills are what employers now demand.'*

## The importance of basic skills

It is not just higher level skills where employer investment can have a positive effect on business performance. Research by the NRDC, highlighted that (while there are no systematic data available for the UK on the benefits to employers of investing in basic skills training), some international evidence studies have suggested that employer-provided literacy and numeracy courses may raise productivity, improve the use of new technology in the workplace, contribute to enhanced customer satisfaction, save time, and reduce costs. The same research highlighted that 'labour market studies indicate that very few jobs could be performed properly without basic skills, and that skills requirements, and especially the numeracy requirements of jobs, will further increase in coming years'

According to National Numeracy, while it is 'difficult to quantify the exact extent to which improving numeracy skills would result in higher economic growth but the 2010 OECD report, 'The High Cost of Low Educational Achievement', projected a potential increase of 0.44% on the UK's annual GDP if the 10% of 15-year-olds who failed to reach the OECD minimum standard were brought up to that minimum level.'<sup>8</sup>

## Returns on employer investment

A 2012 BIS study into the costs and returns on employer investment in Apprenticeships and other forms of workplace learning found that while some encounter substantial costs in delivering training to their employees, especially to new recruits, 'employers could point to a number of benefits deriving from their training investment.' These benefits were grouped around a number of themes:

<sup>7</sup> World Bank (2010) Stepping Up Skills

<sup>8</sup> <http://www.nationalnumeracy.org.uk/why-is-numeracy-important/index.html>

### Skills supply

- the need to maintain an inflow of young people being trained in the occupations on which the organisation is dependent;
- an inflow of new skills – which can be cascaded through the existing workforce – which result from completing a Framework or an NVQ;
- obtaining an optimum fit between the skills of the employee and the needs of the workplace by being able to shape apprentices' and trainees' approaches to their work and the organisation in which they are employed. This relates primarily to younger apprentices and trainees without much prior experience of employment;
- providing a pool of skilled employees from which supervisors and managers could be internally recruited;
- a more effective means of meeting both current and future skill demand than recruiting from the external labour market.

### Recruitment and retention

- a means of attracting the best quality recruits by being able to offer a period of training leading to a widely recognised qualification;
- a recognition that people who undertake their initial vocational education and training with a given employer are more likely to stay with that employer;
- a means of retaining existing staff by providing on-going training designed either to raise their skill levels, and / or accredit existing ones.

### Motivation and reward

- where training is being delivered to existing employees this was described by some employees as a reward insofar as it provided an externally accredited qualification;
- training also acted to motivate employees in that it was a sign that the employer considered the employee worth investing in. This could be interpreted as a signal that the individual's future lay with the company and employees responded accordingly.

### Meeting industry norms

- in sectors such as engineering and construction, Apprenticeships were seen as the primary means of supplying initial vocation education and training, hence employers needed to adopt this form of training if they wanted to take on the most able trainees.

### Corporate social responsibility

- by conferring upon the local community a public good – especially in relation to the recruitment and training of young people – organisations were able to raise their profile as an employer of choice.

The same study also looked at the amount of time it takes for employers to recoup their investment in Apprenticeships, on the assumption that a flow of monetary benefits accrue to the employer over time resulting from an increase in the productivity of trainees. While there was some significant variation between sectors (due to differences in the amount of formal, structured learning required and in the amount of learning that can be done on the job), the study found that in general, employers are able to recoup their costs within one or two years after the training has been completed.

## Summary

This brief analysis has sought to demonstrate the benefits to employers of investing in the development of their own workforce, which statistics suggest is an area where Wales lags behind the rest of the UK, despite relative improvements in recent years.

Higher level skills have long been seen as a driver for economic growth in an increasingly competitive global economy, and research dating as far back as the 1980s has consistently shown a positive link between investment in education, skills and qualifications and increased productivity of the workforce.

Aside from the gains associated with productivity and growth, employers also benefit from better retention and motivation of staff, and demonstrating their corporate social responsibility. The imminent introduction of co-investment in Wales should provide opportunities to further improve the delivery of workforce skills for the future in times of continued austerity for public spending.

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