

Sector Skills Assessment 2010 UK SUMMARY REPORT



Skills for Learning Professionals

Section 1: Introduction

Lifelong Learning UK is the independent employer-led Sector Skills Council responsible for the professional development of those working in the lifelong learning sector across the UK. Lifelong Learning UK represents a workforce comprising around 1.2 million people working in lifelong learning in England, Northern Ireland, Scotland and Wales and is the voice of employers in this sector on skills issues. Lifelong Learning UK provides the strategic perspective for workforce planning and development and influences and shapes relevant policy across the four UK nations. It leads the collection of workforce data and provides analysis on workforce characteristics and trends to inform future workforce planning.

All Sector Skills Councils produce an annual Sector Skills Assessment (SSA) for the whole of the UK as well as each of the four nations. Lifelong Learning UK's SSA builds on Stage 1 of the Sector Skills Agreement (LLUK 2007) and serves as a 'state of the nation report' identifying employer skills needs in the existing and future workforce within the social, economic and political landscapes. It provides employers with intelligence on future skills needs so that skills development can be prioritised for the short, medium and long terms.

The SSA identifies four key elements:

- Drivers of skills demand
- Current skills needs including skills gaps and shortages
- Future skills
- Four nation perspective

Within this context, Lifelong Learning UK has developed the Lifelong Learning Sector Skills Assessment 2010 which:

Gathers information from across the four UK nations, paying specific attention to geographical differences in the sector and highlighting where specific skills issues are manifest

Provides a comprehensive overview of current and future skills and drivers of skills demands in Lifelong Learning UK's sectors, namely:

- Career guidance (CG)
- Community learning and development (CLD) – which includes the seven strands of community based adult learning; community development; community education; development education; family learning; working with parents, and youth work
- Further education (FE) – within this report, this focuses specifically on FE Colleges
- Higher education (HE)
- Libraries, archives and information services (LAIS)
- Work based learning (WBL)

Makes practical recommendations, based on the evidence collected, about how the skills priorities within the lifelong learning sector should best be addressed

Section 2: Methodology

Guided by the UK Commission for Employment and Skills' (UKCES) *Common Labour Market Information (LMI) Framework* (UKCES 2009), the Sector Skills Assessment follows a mixed methods approach incorporating primary and secondary information analysis, including the following strands of work:

Qualitative group discussions and interviews

15 semi-structured group discussions covering over 115 employers and stakeholders about the drivers of skills and future skills and what employers may be doing in order to deal with future skills issues.

Survey A sample survey, based on a proportional allocation of employers in each sector in each nation. The survey, which was hosted on the Lifelong Learning UK website, started in mid June and a data cut was taken in mid September for the purpose of the SSA 2010, receiving 396 responses from organisations across the UK. The survey will remain open throughout the year so that data accumulates.

Secondary analysis Literature was analysed from various sources including policy documents, stakeholder and government reports (from each of the Devolved Administrations), inspectorate reports from each nation and skills research papers. Data has been reviewed from the most recently available Employer Skills Survey in each nation; Labour Force Survey (ONS 2009), and other sectoral datasets such as the staff records from the FE and HE workforces.

Analysis and interpretation All the information from the sources mentioned was analysed to develop common skills themes in terms of current skills gaps and shortages as well as future skills requirements.

In the current economic and political climate, many policies, headline statistics and trends are changing rapidly. All the information presented in this report is accurate at the time of publication.

Section 3: An overview of the UK employment and skills landscape

The UK Commission for Employment and Skills (UKCES) has reported on the UK's progress towards being one of the top eight countries in the world for skills, jobs and productivity - the world class skills ambition (UKCES 2010). The UKCES notes that if the UK is to achieve these ambitions it must have an excellent skills supply system, which includes the lifelong learning sector.

In order to understand the skills position of the lifelong learning sector it is essential to understand the skills position of the UK as a whole, taking into account any differences across the four nations. It is also essential to view the international picture which reveals how the UK compares to other nations in Europe and the rest of the world.

3.1 Productivity

The UK is the sixth largest economy in the world and the fourth largest in the Organisation for Economic Co-operation and Development (behind the USA, Japan and Germany). In recent years, despite the impact of the economic downturn, the UK has enjoyed robust growth overall, averaging around three per cent per annum (UKCES 2010).

The UK ranks 11th out of the 30 OECD countries in terms of productivity, measured by Gross Domestic Product (GDP) per hour worked. This is outside the top quartile of OECD performance.

3.2 Employment rate and Gross Value Added (GVA)

The UK workforce across all sectors was just over 29.1 million people between May and July 2010 (ONS 2010). During this period, the employment rate for the working age population (aged between 16 and 64) was 70.7 per cent (ibid.).

Gross Value Added (GVA) per head is the standard measure of regional economic success and prosperity and is expressed as an index calculated on the UK value of 100. National variations of GVA in 2008 ranged from 74.3 in Wales to 102.4 in England (see table below).

GVA index in the four nations:

United Kingdom	100
England	102.4
Northern Ireland	78.9
Scotland	97.9
Wales	74.3

Source: UKCES 2010

3.3 Skills

Data is collected by the Employers Skills Survey in each nation to understand the position on recruitment and skills for all sectors. The following table summarises data relating to vacancies, hard to fill vacancies, skills shortage vacancies, and skills gaps as faced by all employers in the four nations.

Comparison of vacancies and skills in the four nations

	Vacancies as percentage of total employed	Hard to Fill Vacancies as a percentage of total employed	Skills Shortage Vacancies as a percentage of total employed	Percentage of employers reporting skills gaps	Skills gaps as a percentage of total employed
England	1.7	0.4	0.3	19	7
Northern Ireland	2.4	0.7	0.4	14	8
Scotland	3.1	1.6	0.7	20	8
Wales	3.5	1.2	0.5	18	6

Sources: England, National Employer Skills Survey 2009; Northern Ireland, Skills Monitoring Survey 2009; Scotland, Scottish Employer Skills Survey 2008; Wales, Future Skills Wales 2005

As seen in the table above, only a minority of employers across all sectors report having skills gaps and the proportion of the workforce that has skills gaps does not vary greatly across the four nations. Skills gaps are reported far more frequently than skills shortages, although employers tend to report a greater negative impact from skills shortages. The implication is that employers would rather have an individual with skills gaps in a given post, rather than the post remaining vacant.

3.4 Qualifications

According to data from the Organisation for Economic Co-operation and Development (OECD 2009), 36.5 per cent of the working age population in the UK have intermediate skills (QCF Level 2-3). This ranks the UK in 21st position in the international skills table out of the 30 OECD countries, ahead of Belgium, Ireland, Australia and New Zealand. For high level skills (QCF Level 4-8), the UK has 31.8 per cent qualified to that level, which ranks the UK 12th in the international skills position, ahead of Sweden, France, Germany and Italy.

Recent research by UKCES on progress across the four nations towards 2020 ambitions for qualifications (UKCES 2010) reported that the S/NVQ Level 4 targets would be achieved:

UK Qualifications – current and projected attainment 2008-2020 (Ambition 2020)

Qualification levels (S/NVQ)	Percentage of workforce at the qualification level in 2008	Target percentage of workforce to be at the qualification level	Projected attainment of percentage of workforce at the qualification level	Gap
Level 4+	31%	Increase to 40%	42%	Above target (by 2% points)
Level 3	20%	Increase to 28%	19%	Below target (by 9% points)
Level 2	20%	Increase to 22%	20%	Below target (by 2% points)
Below Level 2	18%	Reduce to 6%	14%	Below target (by 8% points)
No qualifications	11%	Reduce to 4%	5%	Below target (by 1% point)

Source: UKCES 2010

Section 4: Profile of the lifelong learning sector

The lifelong learning sector provides employment for over 1.2 million people in the UK, with approximately 53,000 employers in the sector contributing to local economies, as well as meeting the learning and skills needs of millions of people across the UK.

Number of employers in the lifelong learning sectors across the four nations

	CG	CLD (including YW)	FE	HE	LAIS	WBL	Total
UK	624	50,004	437	167	1,083	2,096	54,411
England	508	41,568	365	131	869	1,515	44,956
Northern Ireland	12	1,000	6	5	34	110	1,167
Scotland	64	5,019	43	20	126	389	5,661
Wales	40	2,417	23	11	54	82	2,627

Source: Lifelong Learning UK SIR 2008/09; Universities UK; LLUK archives profile study 2008; LLUK and stakeholder estimates.

Number of employees in the lifelong learning sectors across the UK

	CG	CLD (including YW)	FE	HE	LAIS	WBL	ESA	Total
UK	17,599	417,955	305,243	382,275	64,493	41,525	50,654	1,279,744
England	14,107	273,073	268,310	314,805	56,631	30,000	43,277	1,000,203
Northern Ireland	210	26,724	6,357	7,595	1,059	1,625	892	44,462
Scotland	2,019	61,879	21,748	39,780	5,434	6,900	5,165	142,925
Wales	1,263	56,280	13,565	20,095	2,089	3,000	1,321	97,612

Source: LFS 2009; LLUK SIR 2008/09; SFC staff record for Scotland's colleges 2008/09; WAG SIR 2008/09; HESA staff record for 2008/09; Libraries NI; LLUK archives survey 2008; stakeholder estimates.

Characteristics of the lifelong learning workforce include gender, ethnicity, diversity and qualifications profiles, as well as working patterns and occupational levels.

Approximately 61 per cent of staff working in the lifelong learning sector across the UK are female and 39 per cent are male. Variation across the four nations is slight: in England, 61 per cent of the workforce is female; in Northern Ireland, 65 per cent; in Scotland 62 per cent and in Wales, 63 per cent.

50 per cent of the lifelong learning workforce across the UK is aged 45 and above, whereas only 26 per cent are below 35. The age profile does not differ considerably across the four nations.

93 per cent of the workforce across the lifelong learning sector as a whole is white. Overall, the percentage of staff who are from Black and Minority Ethnic groups varies among sectors, ranging from approximately five per cent in educational support activities (ESA) to approximately nine per cent in LAIS and higher education. There is some variation across the four nations: in England, just over eight per cent of the workforce are from BME groups; in Scotland, approximately three per cent and in Wales, approximately two per cent. In Northern Ireland, the total workforce numbers are too low to accurately report the ethnicity profile.

15 per cent of the lifelong learning workforce across the UK has a disability. This is slightly higher than the figure for the workforce across all sectors in the UK (13 per cent). There is some variation across the four nations: in England, 15 per cent of the workforce have a disability; in Scotland, 12 per cent and in Wales, 13 per cent. In Northern Ireland, the total workforce numbers are too low to accurately report on disability.

Approximately 69 per cent of staff in the lifelong learning sector across the UK work full-time and 31 per cent work part-time. This average is similar to the figure in all four nations.

More than half of the UK lifelong learning workforce is employed in professional occupations, which include lecturers in further and higher education; professional youth workers; librarians and archivists, and training consultants amongst others. Around 12 per cent are in associate professional and technical occupations which include youth and community workers; learning support staff; HE instructors; library and archive assistants, and recruitment officers amongst others. The profile is generally similar for the lifelong learning sector across the four nations.

Overall, the UK lifelong learning workforce is a highly qualified workforce, with 69 per cent of staff qualified to an S/NVQ level 4 or above. There is some variation across the four nations: in England, 69 per cent of the workforce is qualified to this level; in Northern Ireland and Scotland, approximately 73 per cent and in Wales, approximately 75 per cent.

Section 5: What Drives Skills Demand?

The demand for skills is driven by a variety of factors including economic, political, social, technological and environmental changes. Since the publication of the 2009 Sector Skills Assessment, some of the biggest drivers of change in the lifelong learning sector (and indeed the labour market in general) have been the formation of a new Coalition Government in Westminster and a recession-hit economy. Moreover, as Coalition Government in Westminster is implementing its policies for reduced public funding and each devolved administration is reviewing spending, there are many unknowns. However, what is certain is that change is inevitable – in policy, economic climate and society – and all of these will have an impact on the skills demands of the UK workforce as a whole, as well as in the lifelong learning sector.

5.1 Economic drivers

Reduced funding: In May 2010, soon after its formation, the Coalition Government in Westminster spelled out the need for immediate action to cut the UK fiscal deficit. Overall, the UK Government is making £81 billion of cuts to public spending which will reduce the amount of Government funding across the lifelong learning sector as a whole and will have a significant impact on funding levels across the Devolved Administrations.

Globalisation: The increased integration of education across Europe (“Single European Market in Education”) and the growing need to access the international market will have implications on staff skills. As institutions encourage learners from abroad to study in the UK, staff will require skills that enable them to support learners and customers from diverse backgrounds and countries.

5.2 Political drivers

One of the primary drivers of skills demand in the lifelong learning sector is government policy. In the UK, skills policies are the responsibility of each of the four nations.

Skills strategy for England: *Skills for Sustainable Growth* (BIS 2010), which replaces the *Skills for Growth* strategy (BIS 2009), sets the overall policy context for the lifelong learning sector in England. The strategy aims to simplify the skills landscape and empower individuals to have ‘consumer choice’ over the skills they wish to develop.

Apprenticeships serve a central role in the strategy. The number of Apprenticeships is set to increase, and the progression routes from Level 3 to Level 4 Apprenticeships and higher education will be clearer. Alongside this will be a wider and more flexible system of vocational qualifications and protected funding for informal adult and community learning. The strategy also emphasises the importance of investment in training by employers and individuals.

Skills strategy for Northern Ireland: The two key policy documents from the Department for Employment and Learning (DEL NI), *Success Through Skills* (DEL NI 2006) and *Success Through Skills Progress Report* (DEL NI 2007), set out the vision for the skills strategy and its contribution to Northern Ireland’s productivity and competitiveness in the global economy. The vision is that, by 2015, Northern Ireland’s economy is highly

competitive in global terms. The Department for Employment and Learning is consulting on a revised Skills Strategy for Northern Ireland – Success through Skills 2, which will provide the overarching strategy for skills development in Northern Ireland over the next decade.

Skills Strategy for Scotland: The overarching policy that impacts on the lifelong learning sector in Scotland is *Skills for Scotland: A Lifelong Skills Strategy* (Scottish Government 2007), which had laid out the Scottish Government's plan to develop a cohesive lifelong learning system centred upon the individual but also responsive to employer needs. This key policy document asked learning and training providers to fulfil specific actions, including the need for providers to consider themselves as part of one system geared towards helping people develop the skills they need, where articulation, integration and working with other providers are the norm.

In October 2010, the Scottish Government published a refreshed *Skills for Scotland: Accelerating the Recovery and Increasing Sustainable Economic Growth* (Scottish Government 2010), which recognised the progress made since 2007 and identified how the Government plans to reposition their skills policy to accelerate economic recovery and to realise their long-term economic aspirations for Scotland.

Skills strategy for Wales: *Skills that work for Wales* (Welsh Assembly Government 2008) is a skills and employment strategy and action plan that builds upon and replaces the Skills and Employment Action Plan that was published in 2005. The strategy provides a response to the Leitch Review of Skills in the UK and the independent review of the mission and purpose of further education in Wales. The strategy and action plan include: new approaches to funding; a more demand responsive skills and business support service; integrated skills and employment services delivered through partnership between the Assembly Government and Department for Work and Pensions, and the transformation of the learning network. This document was produced prior to the recession and is currently being reviewed.

Other than the primary skills strategies, there are various other specific policies, legislation and regulations (both new and existing) that have an impact on the lifelong learning sector, particularly to address the identified skills needs of partnership and collaborative working and new ways of delivering learning to widen participation.

5.3. Social drivers

Demographic changes: With the impending abolition of the default retirement age and an increase in the age at which the state pension is payable, there will be a larger number of people in the active workforce for a longer period. This ageing workforce will need skills to compete in and contribute to a rapidly changing labour market. Recent research suggests that employers across the UK are under-prepared for the issues raised by the ageing workforce, despite the impending changes and the fact that a third of the UK workforce will be aged over 50 by 2020 (CMI and CIPD 2010). A related issue is around skills post-retirement for those that want to continue to work or volunteer, perhaps in a different field or trade. This is likely to result in an increased number of older adults accessing learning provision.

Inward migration: The last decade has seen a substantial increase in the movement of people between countries, both within Europe, and on a global scale. Inward migration to the UK will result in an increasingly diverse population, and there is a role for the lifelong learning sector in helping migrants to learn the language where required, integrate into their new communities and acquire skills and cultural knowledge to play a productive role in UK society. There is also a role for the sector in helping those communities welcome and adapt to their new members (NIACE 2009).

Anyone who delivers learning and information to such a diverse population will require skills in overcoming the issues around social exclusion, as well as cultural knowledge and sensitivity so that learning and information delivery is effective and appropriate.

Increasing number of volunteers in the workforce: The Coalition Government's agenda of 'Big Society' (Cabinet Office 2010) will see a change in the makeup of the workforce with volunteers playing a larger role. Reports from across the four nations are already noting the increasing numbers of volunteers along with increasing numbers of participants and learners.

Bilingualism: In Wales, one of the most important social drivers is the demand to create a Bilingual Wales. In the last ten years, there has been a rise of Welsh medium schools and general statistics for Wales show that in January 2009, 99.8 per cent of pupils in maintained primary schools were taught Welsh as either a first or second language (Statistics for Wales 2009), thereby indicating a rise in the demand for Welsh language skills. There is also a strong will to ensure equal treatment of the Welsh language in Wales.

The Scottish Government is promoting Gaelic and stimulating demand for Gaelic language skills as an integral part of Scotland's heritage, national identity and current cultural life. The Scottish Government has introduced structures and initiatives to ensure that Gaelic has a sustainable future in Scotland.

5.4 Technological drivers

With new electronic technologies being introduced regularly, the workforce will need relevant skills to use digital technology effectively in order to help deliver creative and inspiring learning experiences. The workforce will need to be agile to adapt and learn how to use digital learning resources and platforms in order to deliver e-learning, distance learning and blended learning in a way that engages and stimulates learners from diverse backgrounds.

5.5 Environmental drivers

The Governments in Westminster as well as the Devolved Administrations confirm that the green agenda is a key driver and has potential to impact on the lifelong learning workforce. The two main impacts of this will be that frontline delivery staff will need to be up-skilled in the applications of green technology in order to deliver relevant and up-to-date provision and that all staff will need knowledge and awareness of environmental sustainability.

5.6 Conclusions

As public funding faces a squeeze, there will be the need for more efficient use of material and human resources. More will have to be done by effective collaboration both within and outside the sector. New ways of working in order to deliver learning and information should be introduced. All these changes will require strategic planning and leadership to ensure organisations, management and the total workforce are prepared to work competitively in a world where public funding is limited and technology is rapidly advancing.

Section 6: Current Skills Needs

The tables below depict the incidence and density of skills issues in the four nations.

Incidence of vacancies, skills shortages and skills gaps

	Percentage of lifelong learning employers reporting vacancies	Percentage of lifelong learning employers reporting hard-to-fill vacancies	Percentage of lifelong learning employers reporting skills shortage vacancies
England	24	5	4
Northern Ireland	27	4	NA
Scotland	26*	NA	NA
Wales	24	6	4

Density of skills shortages and skills gaps

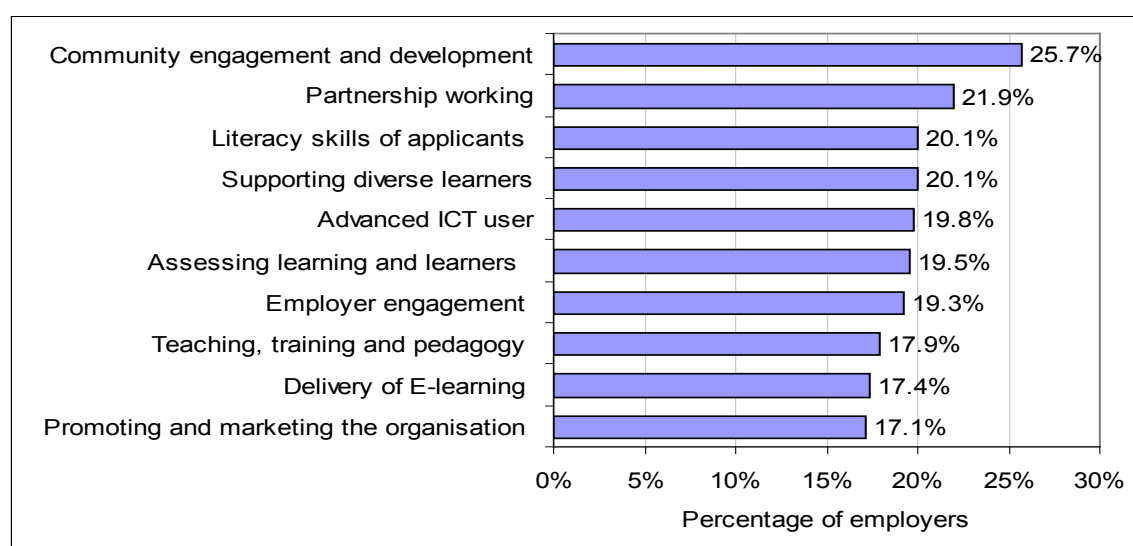
	Hard-to-fill vacancies as a percentage of total in employment in lifelong learning	Skills shortage vacancies as a percentage of total in employment in lifelong learning	Skills shortage vacancies as a percentage of hard-to-fill vacancies in lifelong learning
England	0.2	0.2	76
Northern Ireland	0.4	0.4	92
Scotland	0.5	0.3*	51*
Wales	0.4	NA	NA

Sources (both tables above): England, National Employer Skills Survey 2009; Northern Ireland, Skills Monitoring survey 2009; Scotland, Scottish Employer Skills Survey 2008 *data to be treated with caution, as it is not fully robust by Futureskills Scotland's own criteria; Wales, Future Skills Wales 2005

6.1. Recruitment and skills shortages

According to the Employer Skills Survey in each of the four nations, vacancies were reported by between 24 and 27 per cent of lifelong learning employers across the UK. Between four and six per cent of employers reported that some vacancies were hard to fill, most of which were skills shortage vacancies.

Skills shortages identified through LLUK's SSA 2010 survey



Source: Lifelong Learning UK 2010 SSA survey, base 374 (Example: 25.7 per cent of 374 employers reported that “community engagement and development” was a skill that was lacking among applicants)

6.2. Skills gaps

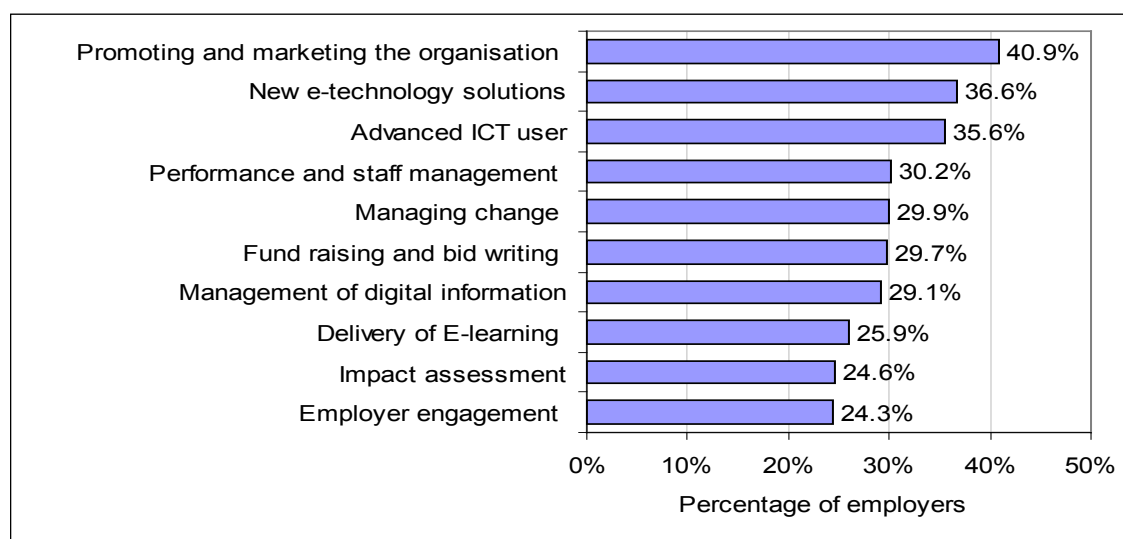
According to the data from the Employer Skills Survey across the four nations, the majority of employers in the lifelong learning sector regard their staff as fully proficient with only between 17 and 28 per cent of lifelong learning employers across the UK reporting that they had staff with skills gaps. The national breakdown of skills gaps across the lifelong learning sector can be seen in the table below.

Skills Gaps

	Percentage of lifelong learning employers reporting skills gaps	Skills gaps as a percentage of total in employment in lifelong learning
England	21	6
Northern Ireland	20	3
Scotland	28*	7
Wales	17	3

Sources: England, National Employer Skills Survey 2009; Northern Ireland, Skills Monitoring survey 2009; Scotland, Scottish Employer Skills Survey 2008 *data to be treated with caution as it is not fully robust by Futureskills Scotland's own criteria; Wales, Future Skills Wales 2005

Skills gaps identified through LLUK's SSA 2010 survey



Source: Lifelong Learning UK 2010 SSA survey, base 374. (Example 40.9 per cent of employers reported that “promoting and marketing the organisation” was a skills gap within their existing workforce.)

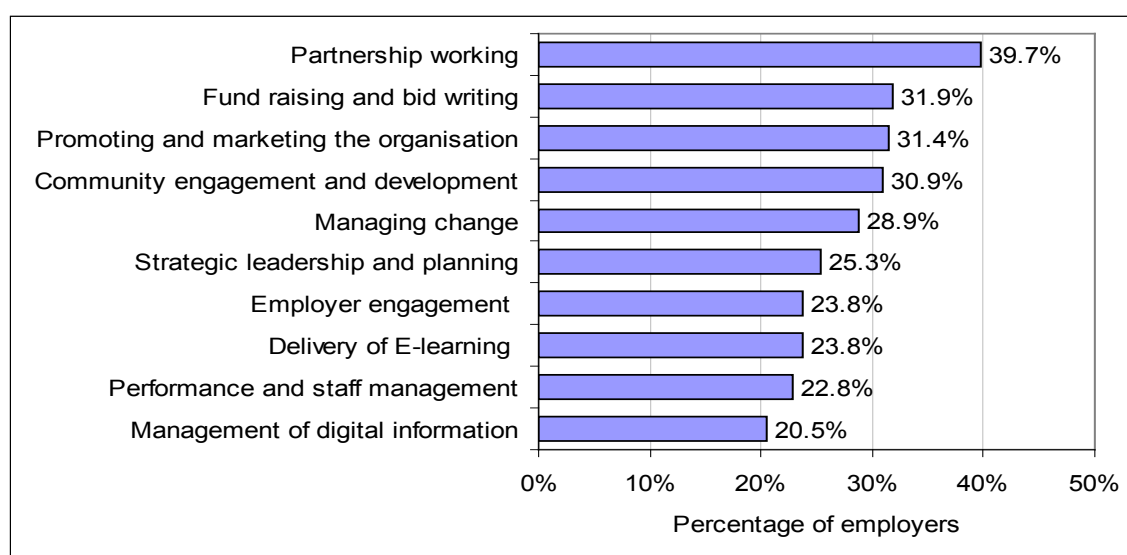
Section 7: Anticipating What Lies Ahead

7.1. Working Futures projections

According to IER's Working Futures projections, overall employment levels in the lifelong learning sector are expected to rise by approximately 3.5 per cent between 2007 and 2017, compared with 6.2 per cent across all sectors. The increase in employment is predicted to be higher across all sectors than in the lifelong learning sector, with the exception of Scotland, where the rise in levels of staff is expected to be similar to the increase in the economy as a whole. It is predicted that approximately 40 per cent of the lifelong learning workforce across the UK will need to be replaced over the next ten years due to retirements.

7.2. Future skills

Future skills identified through LLUK's SSA 2010 survey



Source: Lifelong Learning UK 2010 SSA survey, base 395. (For example: 39.7 per cent of employers reported that “partnership working” was likely to be a future skills need.)

7.3. Future Scenarios

The decline in public funding projected over the next four years and beyond will inevitably accelerate the reform of the lifelong learning sector. A likely scenario is the creation of one overarching framework that would streamline standards to one common set of skills and competences, while providing individuals with more flexibility for career progression along multiple pathways, thereby increasing professionalism across the sector. The framework would allow for geographical and national differences to be incorporated in order to support different skills requirements, while allowing employers to plan for specific workforce development activity.

Although integration across the sector will drive future developments, each part of the sector will face specific challenges. Volunteers will begin to play a significant role in service delivery, while changes in the activities of providers will require strategic leadership to deliver meaningful learning experiences for an increasingly diverse learner community.

Section 8: Conclusions and Skills Priorities

Skills priorities identified for the UK wide lifelong learning sector are similar to those identified in 2009 (LLUK 2010), even though they have to be viewed in the changing economic and political climate. The priorities are:

- Collaboration, partnership working, including engagement with communities
- Skills relating to the utilisation of e-technology
- Management skills
- Basic skills of literacy and numeracy as well as ICT skills
- Welsh language skills across Wales
- Transferable skills, including communications, interpersonal and ICT skills
- Skills relating to strategic leadership and planning

8.1 Recommendations for employers in lifelong learning

The impact of these issues can be addressed by creating a landscape in which various approaches to skills development are facilitated, encouraged and valued. In order to achieve this, employers in the lifelong learning sector across the UK should:

- Continue to increase collaboration and partnership working to share effective practice and take advantage of economies of scale. The lifelong learning sector needs to improve relationships and interfaces among sectors to ensure that the sector really does operate as one system.
- Develop more short courses, bite-sized training and on-line access for learners, while continuing to ensure staff have the skills to deliver and support these new methods.
- Continue to improve the quality of methods of identifying staff training and development needs – National Occupational Standards can be useful here.
- Focus on continuing professional development, despite the current economic situation, in order to keep pace with change and prepare the lifelong learning workforce to support the skills needs of the rest of the workforce and drive economic recovery of the UK as a whole.
- Continue to embed equality and diversity into working policy and practice – a diverse workforce is better able to support the demands of an increasingly multicultural and diverse population.

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