

SW REGION SECTOR SUMMARY

LANTRA

SECTOR FOOTPRINT

Lantra is the Sector Skills Council for the environment and land based sector (www.lantra.co.uk). It represents 17 sub sectors: animal care; animal technology; equine; farriery; veterinary nursing; agricultural crops; agricultural livestock; production and amenity horticulture; floristry; fencing; trees and timber; landscaping(hard and soft); land based engineering; aquaculture(incorporating fisheries management); environmental conservation; game and wildlife management.

- Lantra's Sector Skills Agreement was launched on November 1 2006. The South West report was published in January 2007.

LANTRA LABOUR MARKET

Sources: SLIM SW Sector balance sheet, June 2008, Lantra SSA, NESS 2007 data derived from LSC SW research team.

Sector size & business unit size

- There are around 23,600 businesses or organisations that operate wholly or principally in the land-based sector within South West.
- 56,000 people work within the sector equating to 14% of the UK's land based workforce and 2.2% of the total employment for the region (these figures possibly an underestimate due to lack of data on migrant and casual workforce).
- 99% of businesses in the sector employ less than 10 staff.
- 70% businesses employ no staff at all.
- 69% of the workforce are sole proprietors and 80% of these are over 45.
- Majority of land-based workforce in SW is in Agriculture (57.2%). Production Horticulture (11.6%), Landscape (9.1%), Equine (5.3%), Environmental conservation (4.6%), Animal Care (4.3%), Trees & Timber (2.2%), Floristry (1.7%), Land based Engineering (1.5%), Fencing (1.4%), Veterinary Nursing (0.8%), Game and Wildlife Management (0.5%), Farriery (0.4%) and Aquaculture (0.1%).

Profile of the workforce

- The workforce is predominately male. 68% of those working in the sector are male compared to an average for all industries in the region of 53%.
- The age profile of workers within this industry sector is older than the average for the region as a whole. 38% of the Lantra workforce in the SW is aged 50+ compared to 30% for the SW as a whole.
- 46% of the workforce is aged 25-49 compared to 57% regionally.
- The average age of an English farmer is 58.
- There was a 17% change between 1998 and 2003 in this sector of employment in the SW. Forecasts of employment suggest that from 2004 to 2014 there will be a loss of 14,000 jobs due to contraction in this sector's employment although an additional 22,000 jobs will need to be filled due to replacement demand (created by people leaving that sector of employment or retiring).

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Vacancies & recruitment

- Employing establishments within Lantra in the SW reported 1,475 vacancies in 2007, accounting for 3% of the total number of vacancies in the region.
- Of those vacancies 56% were hard-to-fill, significantly higher than the overall average for the SW of 35%.
- In 2007 there were 575 vacancies that were as a result of skills shortage accounting for 39% of all vacancies. Skills shortage vacancies also account for 70% of all hard-to-fill vacancies, higher than the SW average of 62%.
- 12% of Lantra establishments in the SW reported skills gaps amongst their existing workforce, marginally lower than the regional average of 16%.

Qualifications in the workforce

- Low proportion of the labour force with nationally recognised qualifications at the higher level, 12% qualified to Level 4+ compared to 31% for the SW as a whole.
- High amounts of practical and technical training is undertaken but not recognised as it falls under non-accredited provision.
- This non-accredited provision is highly valued within the sector.
- 15% of the Lantra workforce in the SW are without qualifications compared to an average for all industries in the SW of 8%.
- 48% of Lantra establishments in the SW provided on or off the job training in the 12 months prior to the NESS07 survey, 20 percentage points lower than the average for all industries as a whole in the SW (68%).

KEY DRIVERS AND ISSUES

- The South West region has a population of over 5 million and is the largest and most rural of all English regions.
- 52.1% of establishments report that they put workers on general training courses
- 37.4 % of establishments have either a written business plan or a written training and development plan, of which 10.0% hold both a business and training plan
- Nationally 29% of employees have trained within the last 13 weeks, yet for Lantra the percentage is just 12%

The Sector Skills Agreement identifies the following key issues for the sector:

New approaches to land management and stewardship

- Implementation of CAP (Common Agricultural Policy) reforms, single farm payments and cross compliance
- Implementation of new Rural Development Regulation and the RDPE (Rural Development Programme for England)
- Alternative renewable energy sources

Changes in Business practice

- Improved business advice and guidance relevant to micro-businesses
- Quality assurance schemes

All information and data contained in this sector summary is accurate up to 31May 2008

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- Customer relationship management
- Improved access to and recognition of, diverse forms of lifelong learning and continuing professional development

Rural and urban regeneration

- Development of regeneration programmes
- Lasting legacy in the form of parks and green spaces
- Supporting Olympic infrastructure and development of world-class equine competitors

Impact of animal welfare legislation

- Higher professional standards and duty of care required of all people handling animals

Demographics

- Attracting new entrants of all ages
- Providing opportunities for career progression and development
- Influencing migration policy and operation of control mechanisms

Importance of voluntary organisations and social enterprises

- Improving visibility of these business within mainstream support programmes
- Importance of social enterprises in supporting regeneration and inclusion

Health and Safety

- Legislative requirements
- Safer working environments
- Reduction in ill health

Modernisation of rural delivery

- Establishment of new agencies to support environmental and rural development and deliver Public Service Agreement targets
- Devolution of decision making and resources to regional organisations
- Streamlining of funding support mechanisms

Lantra's proposed solutions to address these issues include:

- **On-line competency framework**
Better aligned and recognised qualifications, learning programmes and funding with the needs of employers
- **Skills Passport**
Ensuring the workforce has recognised, recorded and transferable Skills
- **Small Business Club**
Ensuring the transfer of information, business skills and networking
- **Lantra Course-Finder website**
A continually updated and interactive method of finding the right training
- **Management Centres**
Transfer of ideas and knowledge at a higher level
- **Greater integration of FE/HE**

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Ensuring availability and delivery of courses at a local level

- **Maintain and develop specialist network**
Strength of approved and quality delivery mechanisms
- **Land Based Observatory**
Central point where information can be shared and disseminated for all
- **Matching overseas and UK Qualifications**
To enable overseas workers skills to be properly recognised and gain employment
- **On-Line Job Shop**
Database populated by industry to reach the sector easily
- **Specific migrant training**
Especially in the area of Health and Safety
- **Trades Union activity**
To create links with the unions to create fair working and training, as required, for all
- **Lantra Skills check**
A means by which a business can be assessed and monitored as part of a Business Planning Process.
- **Train to Gain service**
Improved awareness and use of the Train to Gain service by the sector

This list is not exhaustive but provides a flavour of some of the proposed activities and strategies.

NSAS/COVES /14-19 DIPLOMA/HE (NATIONAL SKILLS ACADEMIES AND CENTRES OF VOCATIONAL EXCELLENCE)

There is no National Skills Academy under development. The network of colleges in the South West is recognised for its specialist nature.

The six Land based colleges in the South West are:

- Hartbury College, Gloucestershire
- Kingston Maurward College, Dorset
- Bicton College, Devon
- Wiltshire College, (Lackham), Wiltshire
- Bridgewater College, (Cannington), Somerset
- Cornwall College (Duchy), Cornwall

The region also hosts two HE funded establishments:

- The Royal Agricultural College at Cirencester
- The Faculty for Seale Hayne, now based at Plymouth University.

CoVEs

National CoVE for Equine - Hartbury and Duchy.

KEY EMPLOYERS

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The most significant employers in the Sector are probably the Colleges, given the profile of the Employer base.

LOCAL & REGIONAL PROJECTS/NETWORKS

Projects

The following are known and anticipated projects/initiatives:

- **Rural Renaissance project**
Circa £13m (RDA funded). Intervention rate (capital and training) at 50%. Ends September 2008.
- **Women in Rural Isolation**
Just coming to the end of a 2 year project with Lantra and Somerset LSC (ESF) - 247K. A very successful project exceeding all outputs, outcome and beneficiaries
- **VTS in the SW**
Just completed - Colleges had a joint fund of circa £980,000 - to be replaced by the new SWRIP (Regional Implementation Plan) commencing this year (VT historically run through SWELBEC and led by Hartbury)
- **Cornwall/OBJ1**
Several projects running and being managed by the new Cornwall Rural Business School run by Duchy College, out of Rosewarne Campus in Camborne

Networks

The following are known networks (not in order of priority):

- **SWELBEC**
An association of the 6 Land-based Colleges from across the Region
- **SW Food and Farming Futures Group (SWFFFG)**
Set up by Sir D Curry in 2001, following F/M. Supported by DEFRA staff and funds ,but only for facilities and staffing, not for members
- **SW CORE**
A body independent of Government, which communicates the SWFFFG to over 100 members
- **Rural Enterprise Gateway (SWREG)**
Launched in 2004 to provides a one-stop shop for information and funding and to encourage collaboration and training. In excess of 250 current groups.
- **SWFD Network**
Business network shared with Improve SSC to recognise the cross over from the food production gate to the plate
- **SW Network of private Land-based Training Providers and Instructors**
- **Migrant Workers Group SW**
Inaugural meeting on 10 November 07 with SSC, TUC, SWELBEC, HSE, RDA and LSC
- **Rural Skills Group Cornwall/Devon**
Meets quarterly. Colleges, LSC, Obj1 team, GOSW, Lantra and Industry Partners
- **British Wool Marketing Board**
Meets 3 times a year. Now at the end of a regional Obj2 project
- **SW Trees and Timber Strategic Group**

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Meets in Cornwall. Membership includes FE, FC, Colleges, HSE and Industry Employers and Operators.

This list is not exhaustive but provides a flavour of some of the key networks already in place.

Lantra also works closely with the following other partners in the region:

- The Business Links
- County Landowners Association
- NFU and other unions
- Cornwall Agrifood Council
- Dartmoor National Park
- English Heritage
- Environment Agency
- Wild Life Trusts
- National Trust
- Farm Crisis Network
- Federation of Small Businesses
- Smiths Gore
- Silvanis Trust
- Job Centre Plus

SUMMARY OF SUPPLY

Source: LSC IPOL data (ILR extract)

Analysis of further education and work based data by Sector Skills Council footprint is not yet available for 2006/07. The data presented below relates to Train to Gain activity which can, in most cases, be attributed to a specific sector.

LANTRA Starts 06/07		
Starts	NVQ in Amenity Horticulture	22
	NVQ in Animal Care	7
	NVQ in Floristry	1
	NVQ in Horse Care	4
	NVQ in Horse Care and Management	1
	NVQ in Livestock Production	21
	NVQ in Racehorse Care	2
	NVQ in Racehorse Care and Management	4
Total Starts		62

HEFC Activity

HE specialist provision at The Royal Agriculture College, Cirencester and Plymouth University (Seale Hayne Faculty).

Also, 50% of HE and degree courses are delivered via the 6 land based colleges within the sector.

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SUMMARY OF DEMAND

Lantra's Annex to the Sector Skills Agreement for South West England dated January 2007 identifies that agriculture, production horticulture, landscape, environmental conservation, equine and trees and timber are all priority industries in terms of the regional economy, environmental value and concentrations of businesses. The needs which apply across the nation too, are broadly grouped as:

Skills to support business development and diversification to improve the performance and competitiveness of businesses including higher level skills in:

- Management and leadership, developing business strategies, business law, human resource management and development, managing migrant labour, financial and risk management, global trading background, European policy and funding opportunities, negotiation skills and contract management
- Problem solving and creative planning.
- Improving business and business diversification skills, marketing and sales techniques for new enterprises and niche market initiatives.

Skills for the workforce – enhanced/updated technical skills to ensure flexible, multi skilled individuals including:

- Coaching, mentoring and supervisory skills such as team building, delegation, networking, supporting apprentices, migrant, casual and temporary workers and volunteers.
- Customer service, in particular managing customer expectations around quality and traceability and understanding customers needs.
- High level sector-specific technical skills including specialist machinery operations, plant husbandry skills and design skills.
- Increasing levels of environmental management in both the urban and rural context.
- Animal welfare skills in response to new legislation and associated duty of care. Animal behaviour in light of increasing customer demands, especially nutrition and alternative therapies.

Skills for those entering the workforce including:

- Employability Skills – problem solving, willingness to learn, flexibility and initiative
- Development of new lines of learning to meet changing business needs and also ensure enhanced employability and mobility between related employments.

Skills for Life including:

- Communications at high level, literacy and numeracy at intermediate.
- ICT skills at intermediate and high level with financial planning e-commerce/on-line selling, networking and teleworking.

Skills for Volunteers and voluntary organisations including:

- Management skills such as planning and organisation, governance, project management, strategic planning and performance improvement.

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- Team working and leadership skills.
- Fundraising skills.
- Skills for Life including ICT and customer service.

In addition to these broad groupings, Lantra's Skills Qualification Strategy (SQS) and resulting action plans will continue to inform the LSC as to which qualifications should continue to be supported as priority qualifications for the sector.

Currently there are a wide range of qualifications across all levels (listed as an Annex to the SQS) and Lantra offers 15 Apprenticeships across its different industries.