

SW REGION SECTOR SUMMARY

SKILLFAST-UK

SECTOR FOOTPRINT

Skillfast-UK is the Sector Skills Council for Apparel, footwear and the textile supply chain, which splits into the three broad areas of manufacturing, trading and services (<http://www.skillfast-uk.org>).

- The specific activities in the supply chain are: materials production and processing, which include processing of raw fibres, spinning and weaving of fibres, tanning of leather, finishing of textiles, manufacture of knitted and crocheted fabrics, production and processing of man made fibres, and production of non-wovens.
- The sector includes product design, the manufacturing of articles, wholesale trading and servicing in textiles, clothing and fashion sub sectors,.

SKILLFAST-UK LABOUR MARKET

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

Sector size & business unit size

- In 2005 there were 1,590 Skillfast-UK business units in the SW – a 7% reduction since 2000.
- A total of 16,600 employees.
- Estimated output (GVA) of £480m
- SW companies contribute 5% of the UK sector output but 9% of total export, weighted towards footwear, leather and leather products as well as textiles.
- SME dominated (95% of employers have less than 50 employees and 87% have 10 or less)
- The Servicing sub sector, including dry cleaning, laundry and repair, accounts for a third of the total employment in the region
- Forecasts of employment growth suggest that from 2004 to 2014 there will be 5,000 jobs lost due to a contraction of the sectors employment although an additional 7,000 jobs will need to be filled due to replacement demand (created by people leaving this sector of employment or retiring).

Profile of the workforce

- Gender split is 58% female and 42% male
- There are varying gender patterns within sector (e.g. men dominate shoe repair and women dominate clothing manufacture)
- The sector has an ageing workforce with approx 32% aged 50 plus and almost 12% are under 25
- Operator and elementary roles make up 34% of the workforce and management and professional roles account for 35%.

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Vacancies & recruitment

- Employing establishments within Skillfast-UK in the SW reported 350 vacancies in 2007, accounting for 1% of the total number of vacancies in the region.
- Of those vacancies 38% were hard-to-fill, higher than the overall average for the SW of 35%.
- In 2007 there were 100 vacancies that were as a result of skills shortage accounting for 27% of all vacancies. Skills shortage vacancies also account for 72% of all hard-to-fill vacancies, higher than the SW average of 62%.
- 15% of Skillfast-UK establishments in the SW reported skills gaps amongst their existing workforce, in line than the regional average of 16%.

Qualifications in the workforce

- Nearly 42% of the workforce do not have a Level 2 or no qualification.
- Almost 35% of the workforce have a Level 3 and above.
- 53% of Skillfast-UK establishments in the SW provided on or off the job training in the 12 months prior to the NESS07 survey, lower than the average for all industries as a whole in the SW (68%).

KEY DRIVERS AND ISSUES

- The sector has an increasingly high volume of manufacture off-shore, whilst SW companies undertake the technical and specialist finishing or production of bespoke items.
- There is a need to improve leadership and management skill levels in this sector as a means of improving competitiveness due to the industry changing from high volume, low margin manufacturing to increased value, higher margin through diversification into evermore specialist markets.
- Key challenges facing the sector are the need to attract young people into the industry and to up-skill those already employed.
- Recruitment problems / skills shortage in designers and technologists.
- Skills gaps in technical skills, multi-skilling, IT, management and sales/marketing
- There is a need to reduce the importance of operator roles and grow the importance of management, technical and commercial roles.
- There is very limited training provision in the SW, especially for footwear and textiles, therefore very little LSC funding is used to upskill in this sector; this presents a challenge for engaging employers who see no solutions to their skills needs.
- This lack of specialist learning provision severely limits the take up of NVQs, even though there are now sub-sector specific qualifications at Levels 2 and 3 available. This is exacerbated by employers who are reluctant to invest in training linked to formal qualifications because of perceived inflexibility and bureaucracy.
- PMO is not considered to be a suitable option for this sector as more specific qualifications are available.

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- Business Improvement Techniques has some value to the sector but as manufacturing is in decline, this is not a priority.
- Due to sector diversity, the preference is for a unitised approach to learning and unit bundling opportunities where employer buys units required but employee can build to Level 2 and above.
- There are key opportunities for niche markets (eg Mulberry in Shepton Mallet), overseas sourcing and international trade as well as technical products (eg John Heathcoat in Tiverton).

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

CoVES

There are currently no sector based CoVEs in the SW

National Skills Academy (NSA)

The business plan for a National Skills Academy was deferred recently and is like to be re-submitted in early 2008

Skillfast-UK is looking to form a Skills HQ in the region. This will be a group of employers working in partnership with a college to form a specialist centre offering 'blended learning', using both peripatetic and in-house trainers. Bridgwater College is working closely with Skillfast-UK to develop a centre of excellence for Laundry Operations. There are several initiatives that underpin the Skills HQ at National level: Flexi –Techs: A programme to help textile technicians build a more flexible range of skills, building on training provided by machine manufacturers; Cascade: A programme to build a training infrastructure for operatives in the apparel and knitwear industries using proven best practice techniques; Expert witness: Nominated employees with expert knowledge are used as initial assessors in order to reduce the cost and burden of implementing NVQs.

KEY EMPLOYERS

These are predominantly SMEs, craft (relying on tourism), lifestyle and internet businesses (looking for business support).

However, the SW does feature larger companies that are leaders in their respective sectors, such as Mulberry, Clarks, Pittard and John Heathcoat.

Traditional clusters are carpets, footwear, leather production and leather goods.

Key industries in the SW are carpet manufacturing, leather goods manufacture, clothing manufacture, wholesale clothing & footwear, laundry & dry cleaning.

- Pittards Ltd, Yeovil – leather manufacturing. Supplier of high performance leather to the world's leading brands of gloves, shoes, luxury leather goods and sports equipment (import skins, dye and export for manufacturing)
- Relyon, Wellington – bed manufacturers
- Mulberry, Shepton Mallet – leather goods
- Clarks, Street – design and prototype only (outsource manufacturing offshore - e.g. China / Eastern Europe)

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- Swisstulle, Chard – manufacture of bobbinet tulle for a wide variety of technical and fashion applications
- Technical Textiles company in Bridgwater
- Morlands (Glastonbury) Ltd, Street - Manufacture of sheepskin products
- John Heathcote, Tiverton, Devon - Technical textiles
- Triumph, Swindon
- High Street shoe repairers and dry cleaners
- Commercial, Hospital and Prison Laundries
- Wilton Carpets
- Axminster Carpets
- Burfield Gloves, Martock, Somerset.

LOCAL AND REGIONAL PROJECTS/ NETWORKS

Mulberry, Bridgwater College and Bath Spa University are working with Skillfast-UK and have put in place a new leather production apprenticeship programme, based on the Skills HQ model. They have revised the occupational standards for leather production and leather goods to form an Apprenticeship in Handbag Making.

Bridgwater College, working with Skillfast-UK and Johnsons, has set up a new upskilling programme for laundries, delivering a newly developed NVQ in Laundry Operations through Train to Gain.

Bath Spa University, City of Bath College and Skillfast-UK are working on validating Foundation Degree programmes in Fashion Design and Textiles.

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.

Skillfast Starts 06/07		
Starts	NVQ in Leather Goods	1
	NVQ in Manufacturing Textiles	23
Total Starts		24

Some qualifications delivered in this sector are collated into the broader engineering sector (eg: Performing Manufacturing Operations) and so specific volumes for this are unavailable at this time.

SUMMARY OF DEMAND

Emerging Priorities 1:

- To assist sector employers in operative recruitment, retention and increasing skills

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- Occupational profile for the SW of key current recruitment needs at Level 2 and Level 3 are:
 - Textile process operators
 - Sewing machinists
 - Leather goods skilled trades
 - Leather production operatives
 - Launderers & dry cleaners
- To increase sector capacity in respect of international trade and supply chain
- To ensure graduate entrants have appropriate technical and commercial skills
- To address the technical skills deficit at operative and craft/technician level by developing the capacity of external providers and employers themselves.

Emerging Priorities 2:

- To build a fit for purpose qualifications infrastructure, including greater modularisation
- To deliver a realistic picture of the sector to teaching and careers professionals – Information, Advice and Guidance (IAG)
- To ensure employers have access to flexible and appropriate management and leadership development opportunities.

There are a number of proposals and strategic developments to support the above.

There is no provision in the SW for footwear and very little LSC-funded provision for apparel or textiles.

Bridgwater College is the regional lead for development of laundry & dry cleaning for key employers such as Johnsons.

Qualifications Strategy

Skillfast is one of 10 SSCs working with the LSC, QCA and Awarding Bodies to fast track some of their qualifications into the Qualifications & Credit Framework (QCF). Their strategy involves some of their current qualifications (listed below) undergoing some adaptation to meet the design principles to enable the units of competence to form full qualifications within the QCF. The SSC also plans to develop new qualifications to meet the needs of employers in the areas such as specialist warehousing and distribution, lingerie design and tailoring. (see Addendum to the Statement of Priorities – *Aligning Public Funding with Priority Vocational Qualifications in England in 2008/9*)

Current qualifications

The following table lists full qualifications that have currency in the sector.

<i>Qualification number</i>	<i>Title</i>
10028432	NVQ in Footwear Manufacture
10028444	NVQ in Footwear Repair
10028456	NVQ in Leather Goods
10028468	NVQ in Leather Production
10033014	NVQ level 2 in Manufacturing Textiles
10033026	NVQ level 3 in Manufacturing Textiles
Q1027860	NVQ level 2 in Manufacturing Sewn Products
10050565	Diploma in Art and Design
50011650	NVQ level 2 Laundry operations

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50011649	NVQ level 2 Support service in laundry
50011662	NVQ level 2 Dry cleaning operations
50011674	NVQ level 2 Dry cleaning service support
10056762	Diploma in Apparel & Footwear Production level 3
10032836	Apparel Manufacturing Technology level 3
10062543	Certificate in Apparel Product Development level 3
10062532	Certificate in Apparel Product Development level 2
10032149	Certificate in the principles and practices of textiles manufacture level 3