



Assessing Learning and Training Provision Serving the Automotive Industry

March 2016

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Foreword from the Minister of State for Skills

Skills are a major contributor to productivity, and as a nation we are not doing well enough. We must raise our game, in areas ranging from basic skills to high level technical and engineering capability. Employers have a central role to play in this.

The UK automotive sector is already an exemplar, leading the way as the most productive of all major European automotive producers. Investment in skills by our leading manufacturers has been a key enabler for this. But as this report shows, in a sector that is growing and transforming there are real challenges, in both the immediate and longer term, in developing the skilled workforce needed to maintain this lead.

The report and its sister report, *Employers' Views of the Jobs and Skills Required for the UK Automotive Industry*, provide valuable information on the industry's skills needs to underpin work on solutions. I welcome that leading employers have come together so effectively to progress this, and am delighted that government has been able to help.

Looking to the future, I hope in particular that employers across the automotive sector will seize the opportunities provided by apprenticeships to build a workforce for the long term.

A handwritten signature in black ink, appearing to read 'Nick Boles'.

Nick Boles MP
Minister of State for Skills



Foreword from the Industry Chairman of the Automotive Council

The automotive industry is at the forefront of the UK economy's recovery. In 2015 we built over 1.6 million vehicles and 2.4 million engines, exporting almost 80% of our production! The UK is the second largest producer of premium cars in the world, with over 40 companies making vehicles here, at some of the most productive car plants in the world. Output is rising, productivity is rising, employment is rising, and UK vehicle output is well on the way to reaching two million annually.

However, through the recession over 100,000 people left the industry through retirement, voluntary severance and redundancy, and as the industry has recovered, few of these people have chosen to return.

As the work of the Automotive Council has identified growth opportunities across the sector, so it has become apparent that this brings both opportunities and challenges for the people working in the industry. For the first time, this report and the *Employers' Views of the Jobs and Skills Required for the UK Automotive Industry* report offer an analysis of short- and long-term skills needs, and recommendations as to how a co-ordinated programme of training schemes and apprenticeships can help fill the gaps. These reports also introduce a newly defined Automotive Industry Job Framework to help bring uniformity of job descriptions across the industry. In the short term we need 2,500 people to fill immediate vacancies, and by 2020 we may need as many as 50,000 more people than currently work in the industry. Such is the scale of the challenge, but through the continuing work of the Automotive Council, taking forward the recommendations in both reports, the UK automotive industry will be able to offer increasing levels of high quality, productive employment across a range of skills and disciplines.

For more information on the work of the Council, the opportunities presented by the UK automotive industry, and the various offers of support and advice that we offer, you are invited to visit our website at www.automotivecouncil.co.uk.

I would like to thank all the businesses who gave their time to complete the surveys, the Skills Funding Agency and the Higher Education Funding Council for England for sharing their data and all those Council members and others who have contributed to this work, without whom these reports would not have been possible.

A handwritten signature in black ink that reads "Nigel Stein". The signature is written in a cursive, slightly slanted style.

Nigel Stein
Chief Executive of GKN Plc
and Industry Chairman of the Automotive Council

Executive Summary

134,000

people are employed in the automotive sector



The West Midlands account for over a third of this total The North West, North East and South East are also key drivers of automotive employment



There were over
6,000
automotive sector
job vacancies

with particularly high volumes in the West Midlands and North West



Working in partnership with employers and relevant organisations this document sets out recommendations to ensure the workforce is equipped with the skills required for a world class UK automotive industry. This report complements and builds on the report “**Employers’ Views of the Jobs and Skills Required for the UK Automotive Industry**” recently produced by the Society of Motor Manufacturers and Traders (SMMT) Industry Forum.

Around 134,000 people are employed in the automotive sector, with the West Midlands accounting for over a third of this total. The North West, North East and South East are also key drivers of automotive employment, reflecting the location of major automotive manufacturers and their supply chains. In the year to September 2015, there were over 6,000 automotive sector job vacancies, with particularly high volumes in the West Midlands and North West.

Skill shortages are most likely to impact on Manufacturing and Engineering job roles within the automotive sector. Skill shortage areas with potentially inadequate levels of provision include: Programmable Logic

Control; Robotics; Advanced Problem Solving; Programme Management; Leadership; Computer Aided Engineering; Quality Core Tools Training; Manufacturing Process Knowledge; and Welding.

Employers from a wide range of manufacturing sectors compete for graduates in key subject areas for automotive engineering job roles. Currently, specialist automotive engineering provision accounts for a relatively small proportion of all learners undertaking Higher Education (HE) provision.



Recommendation



The Automotive Industrial Partnership should support the development of cross LEP/regional initiatives to improve provision of careers advice, recruitment and skills training, targeting hard-to fill roles.

A need for more automotive specific provision has already prompted the Automotive Industrial Partnership to develop and pilot a number of specialised higher level qualifications, including the ProLead leadership and management programme. This approach could be continued for skills areas with low provision such as Design and Development and Lean Manufacturing.



Recommendation



Increase employer engagement with key local providers to ensure they have the capacity, capability and support to deliver the required skills, qualifications and learner numbers to meet employer demand.

The Improving Operational Performance and Engineering Manufacture apprenticeship frameworks account for the majority of all apprentices feeding into the automotive sector. As these frameworks also support employers in other sectors, we need more automotive tailored solutions to address skill shortages.



Recommendation



Widely promote the trailblazer automotive apprenticeship standards and Automotive Apprenticeship Matching Service, to directly address current and future skills gaps and shortages identified by employers.

The introduction of the new apprenticeship levy in England is likely to generate £19.5 million by automotive employers. The apprenticeship levy principles of everybody contributing and all employers taking apprenticeships more seriously should be applied to encourage uptake across the sector, around a range of skills.

We must ensure that employers are fully aware of the apprenticeship support available so that any benefits derived from the Apprenticeship Levy are maximised and that the OEMs and their supply chain work collaboratively.

Non-apprenticeship Further Education (FE) and private training covers a diverse range of specialist and more general provision relevant to the sector. Putting in place an accessible database to help employers identify the most relevant courses and ensuring appropriate pathways are in place to support learner progression, would help meet the specific skill requirements of the sector.

There is a strong relationship between geographical concentrations of provision serving the automotive sector in relation to apprenticeships, FE and private training provision.

FE colleges, private training providers and LEPs

should take note of local and regional employer requirements

when developing and implementing provision at Level 2, 3 and 4+



Although there are 1,700 training providers across HE and FE with learners undertaking subjects relevant to the automotive sector, a large proportion of these learners are linked to a small number of providers. This underlines the importance of automotive employers engaging effectively with the providers in each region to ensure delivery of the right types of learners, with the right type of skills and qualifications and in sufficient volumes, to meet their current and future needs.



Recommendation

The Automotive Industrial Partnership should work strategically with learning providers to increase training in those skills shortage areas with scope to improve current provision.



Some specific LEP areas with significant automotive employment lag behind other areas in meeting local employer skills demand, underlining the importance of coordinated intervention at a local and regional level to address particular shortfalls in provision. Failure to do so may constrain employment growth and further investment in the automotive sector within these

localities. For the automotive sector to be successful, underlying provision and cultural issues also need to be fixed in the wider Advanced Manufacturing and Engineering sector.

Our research has highlighted how difficult it is for employers, providers and other bodies such as LEPs to: identify the range of learning provision available to support automotive employers; understand the specific content of relevant provision that is available and the extent to which this actually addresses the specific requirements of automotive employers; and gauge the quality of this provision.



Recommendation

Develop an aggregated resource of provision serving the automotive industry, in partnership with employers and other key regional stakeholders. This would help identify relevant provision available locally, regionally and nationally, how this meets specific employer requirements and an indication of the quality of support delivered.



1 Automotive Sector Employment and Recruitment Demand

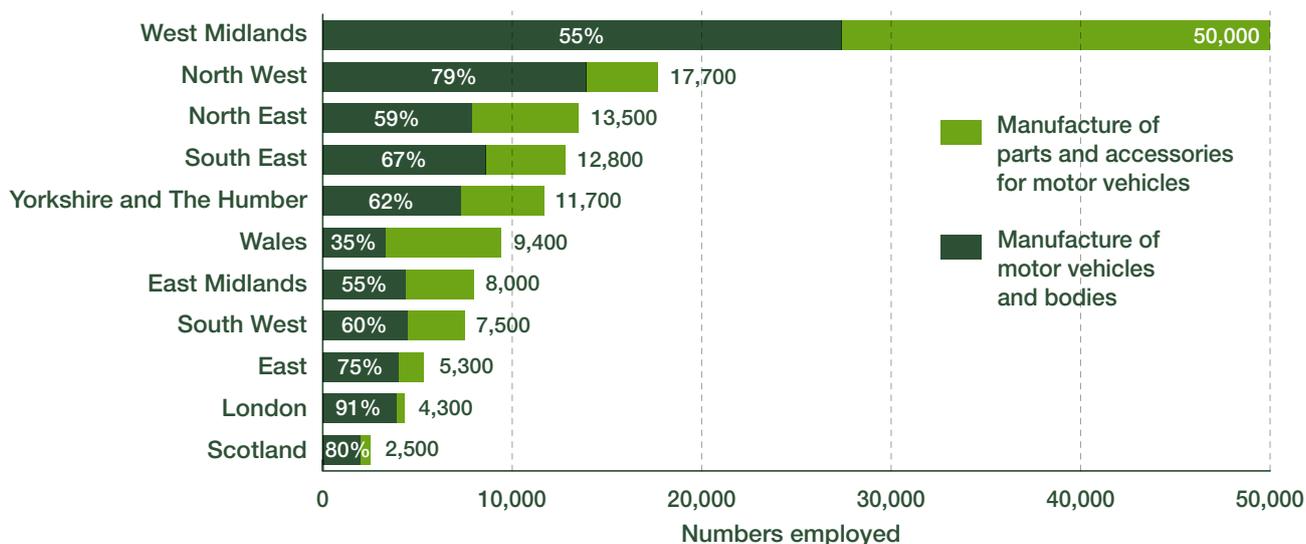
1.1 Numbers employed within the automotive sector

A total of 133,700¹ people were employed in the automotive sector in 2014. Chart 1 highlights the importance of the West Midlands, North West, North East and South East for regional automotive employment.

The focus of automotive employment by sub-sector varies by region and has an impact on the type of skills required by employers and the focus of provision on a regional or sub-regional basis.

Manufacturing vehicles and bodies is most important in London and Scotland, while manufacture of parts and accessories is important for Wales.

Chart 1: Automotive industry employment in Great Britain by region and sub-sector



Source: Business Register Employer Survey (BRES); ONS 2014

1.2 Recruitment Demand

Job vacancies posted on the internet between October 1st 2014 to September 30th 2015 have been used to assess the scale of recruitment demand within the automotive sector.² Although this approach does not capture all automotive related vacancies over this period, it provides a clear insight into the scale of demand within different job families and regions.

Within Great Britain over this period there were a total of 6,140 automotive sector vacancies, with particular concentrations of demand in the Coventry and Warwickshire LEP area (2,500 vacancies, 40% of all automotive vacancies), Cheshire and Warrington (640 vacancies, 10%) and Greater Birmingham and Solihull (580 vacancies, 9%).

More detailed analysis of automotive employment and vacancies by sub-region can be found in Appendix 2.

2 Matching National Skill Shortages to Job Families

2.1 Automotive Skill Shortages and Job Families

Work undertaken by the Automotive Industrial Partnership identified and defined a number of automotive job families, each associated with a range of specific functions and qualification levels (see Appendix 1).

Table 1 highlights the top 15 current and future skill shortages facing the sector, together with the occupational groups impacted by these skill shortages³.

Table 1: Job families impacted by top skill shortage areas

Rank	Top skill shortage area	Job families impacted by skill shortage
1	Lean Manufacturing	Manufacturing, Engineering, Quality, Purchasing
2	Computer Aided Engineering	Engineering
3	Quality Core Tools Training	Manufacturing, Engineering, Quality
4	Mechatronics	Manufacturing
5	Leadership	Manufacturing, Engineering, Quality, Purchasing Materials Planning & Logistics
6	Programmable Logic Control	Manufacturing, Engineering
7	Advanced Problem Solving	Manufacturing, Engineering, Quality Materials Planning & Logistics
8	Manufacturing Process Knowledge	Manufacturing, Purchasing
9	Robotics	Manufacturing, Engineering
10	Programme Management	Engineering, Purchasing
11	Basic Engineering	Manufacturing, Engineering
12	Welding	Manufacturing, Engineering
13	Electrification and hybrids	Manufacturing, Engineering
14	Tool making	Manufacturing
15	Logistics and procurement	Materials Planning & Logistics, Purchasing

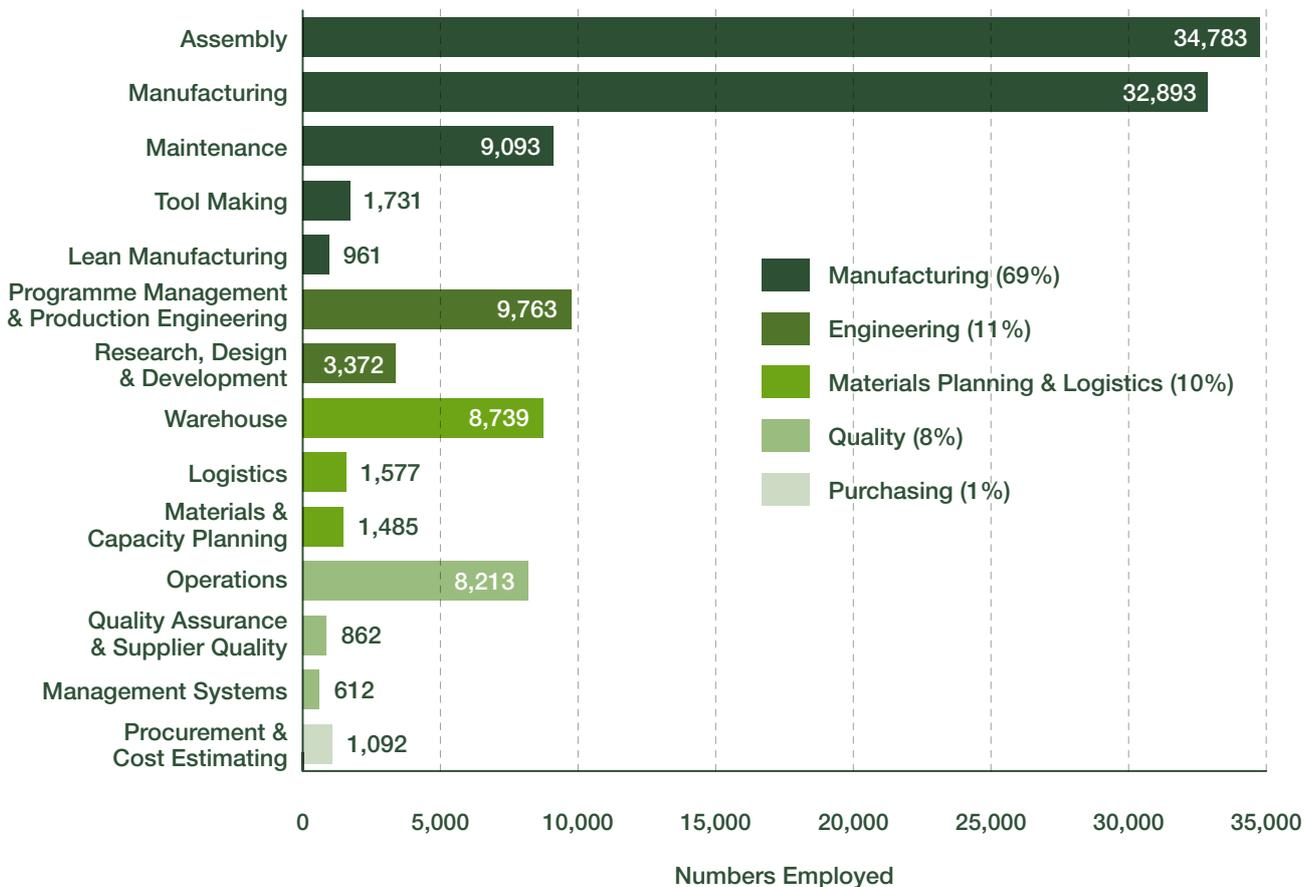
The Manufacturing and Engineering job families are most impacted by skill shortages, so a focus on these job families in particular is used to understand the relative HE, FE and private training provision available (see Chapters 3 and 4) to meet the needs of the sector.

2.2 Employment by Job Family

The numbers employed within each job family⁴ by specific occupation and sub-regional locations of employment help to understand the potential scale and impact of skills gaps and shortages. Of the 133,700 jobs identified within the automotive sector, 115,200 (86%) fit within the 5 job families:

- The overall Manufacturing job family (assembly, manufacturing, maintenance, tool making and lean manufacturing roles) accounted for nearly 80,000 jobs in 2014 (69% of employment in these 5 key job families), with the majority of these jobs being in the assembly and manufacturing sub-families (see Chart 2).
- Although the Engineering job family only consists of 13,000 jobs (11%), it is very important as it contains high-level production engineering, development and design, programmes and research roles.
- The other Manufacturing job sub-families of tool making, maintenance and lean manufacturing are small in terms of employment but key to productivity improvements.
- Just under 20% of employment across these 5 job families is accounted for by the Materials, Planning and Logistics, Quality and Purchasing job families.

Chart 2: Numbers employed within the automotive job families and sub-families



Source: Estimated from Annual Population Survey 2013

Further occupational and regional analysis for these job families is found in Appendix 2.

3 Volume of Learning Provision Addressing Key Automotive Skill Shortages

3.1 Volume of learners compared with skill shortages

SFA data for 2014/15⁵, qualifications and units (known as learning aims) undertaken through FE colleges, private training providers and apprenticeships was mapped against the top 15 current and future automotive skill shortages. This shows the total volume of courses undertaken that could potentially deliver skills priority areas for the automotive sector.⁶

In terms of the number of relevant learning aims, Mechatronics, Basic Engineering and Lean Manufacturing are the key skill shortages associated with the current learning activity.

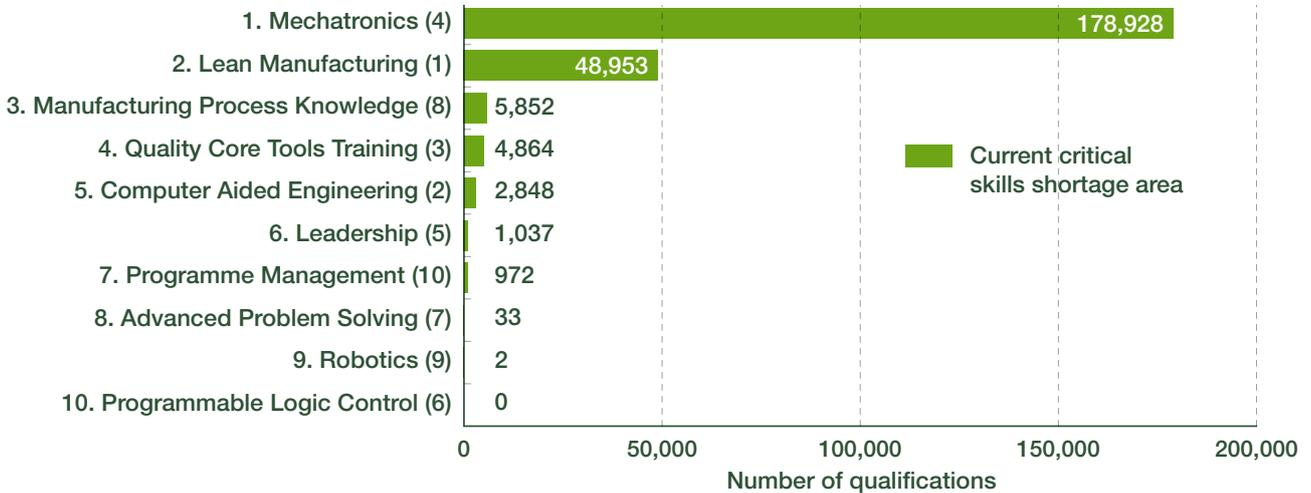
However interpreting this analysis is complex.

- Employers within the automotive industry will be competing with a range of other manufacturing sectors to recruit learners with these skills, so it is not clear that even in these areas that skills supply will meet employer demand.
- On the other hand, some courses are likely to cover specific skills required by automotive employers as part of more general courses, which will not be evident from this analysis.

Although the above analysis uses a number of assumptions, it clearly indicates that there is a lack of adequate provision across most of the skill shortage areas identified by employers.

Chart 3 compares the rank of current critical skill shortage areas with the rank of learner provision associated with each skill shortage area. The data is arranged in order of importance attached by employers to each current skill shortage, with the rank of learner provision associated with each of these skill shortages identified in brackets on the chart.

Chart 3: The focus of current provision in relation to the top 10 current critical skill shortage areas

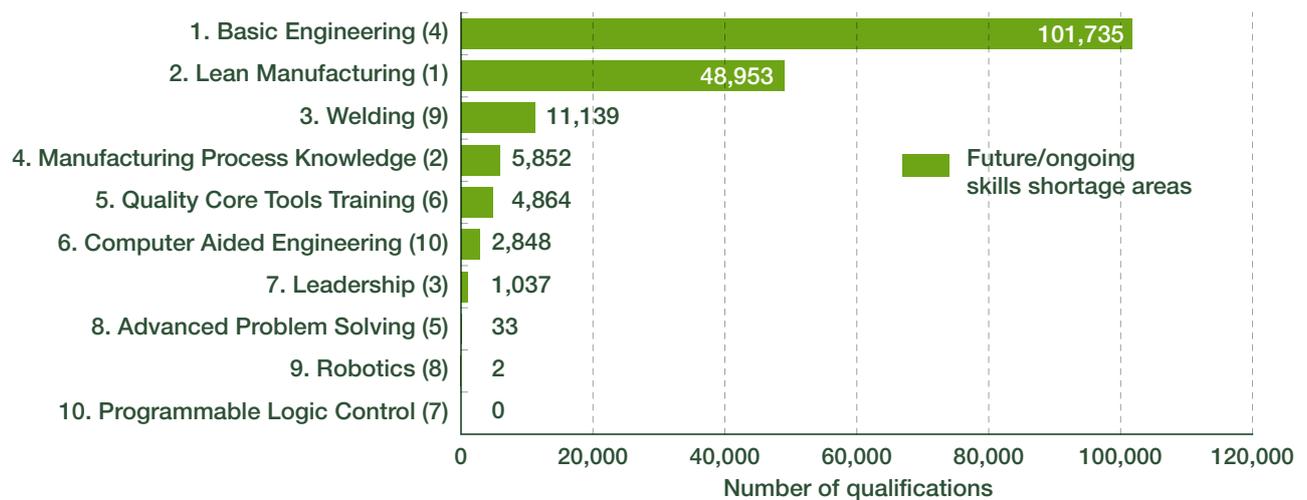


SFA Individualised Learner Record (ILR) data 2014/15/Semta Note: This analysis relates to the number of qualifications or learning units being undertaken and not number of learners.

The analysis points to a lack of adequate provision in relation to the following current key skill shortage areas: Programmable Logic Control, Robotics, Advanced Problem Solving, Programme Management, Leadership, Computer Aided Engineering, Quality Core Tools Training and Manufacturing Process Knowledge.

Chart 4 sets out a similar analysis but with respect to the top 10 future/ongoing skill shortage areas. Again, the data is arranged in order of importance attached by employers to each future/ongoing skill shortage area with the rank of learner provision associated with each of these skill shortage areas identified in brackets on the Chart.

Chart 4: The focus of current provision in relation to the top 10 current future/ongoing skill shortage areas



Source: SFA ILR data 2014/15/Semta: Note: This analysis relates to the number of qualifications or learning units being undertaken and not number of learners

The analysis points to a lack of adequate provision in the same areas as the current future skills needs, with the addition of Welding and the exclusion of Programme Management.

4 Training Provision Serving the Automotive Industry by Type of Provider

4.1 HE Provision

Data was supplied by Higher Education Funding Council for England (HEFCE) on the numbers of Full Person Equivalent (FPE) learners at Higher Education Institutions (HEIs) in England for the Engineering and Manufacturing automotive job families.⁷ It was not possible to match data for the Quality, Purchasing, and Materials Planning and Logistics job families, due to the way courses are coded for these subject areas. Based on the latest annual figures, just under 86,000 FPE learners undertook specific HE courses relevant to the Engineering and Manufacturing job families. This included:

- **Engineering Job Family** – Mechanical, Electronic and Electrical and General Engineering accounted for nearly half of learners in these roles. Employers from a wide range of other manufacturing sectors also compete for HE students doing generic courses relevant to the automotive sector. Specialist automotive Engineering courses comprise a small proportion of all learners undertaking HE provision relevant to automotive.
- **Manufacturing Job Family** - Management Studies accounted for the largest number of learners, including a wide range of management provision serving sectors other than automotive. As leadership is one of the top 10 current and future/ongoing skill shortages, this highlights the need for specialised provision to meet the demands of specific sectors, underlined by the piloting of the ProLead initiative by automotive employers.⁸

Engineering relevant provision relates predominantly to the Engineering Production sub-family (more than 90% of this provision). Although only 4% of total engineering provision relates specifically to Design and Development, this role accounts for a fifth of all automotive engineering job roles (see Chart 2), indicating a potential need for increased provision in this area. Manufacturing relevant provision relates almost entirely to the Manufacturing employment sub-family. There appears to be a potential deficit in specific provision for the Lean Manufacturing sub-family (less than 1% of learners), though Lean Manufacturing may well feature as a component of more general engineering provision.

The intake of students on HE courses is essentially national in nature, therefore the location of HE provision relevant to the automotive sector is not closely aligned with concentrations of automotive employment in each region. More detailed regional and sub-regional (LEP) analysis for both the Manufacturing and Engineering job families is likely to be of interest to employers, LEPs and individual HEIs.

4.2 Apprenticeship Provision

4.2.1 Number of Apprenticeship Learners

Data supplied by the SFA with respect to apprenticeship frameworks of particular relevance to the automotive industry indicates that during 2014/15 there were approximately 94,000 current apprentices in England.⁹ Each relevant apprenticeship framework and pathway was matched to a job family on a 'best fit' basis. Approximately 91,000 apprentices undertook training relevant to the Manufacturing job family, 1,700 apprentices fitted within the Engineering job family, and 850 apprentices aligned with the Quality job family.¹⁰

The most important apprenticeship frameworks (at various levels) supporting the sector in terms of learner numbers include Improving Operational Performance and Engineering Manufacture. These frameworks account for nearly 70% of all apprentices undertaking frameworks feeding into the automotive sector.

However, these frameworks also support a wide range of other manufacturing sectors, highlighting the importance of provision designed to meet the specific needs of the automotive sector such as the development of the trailblazer standards. A more detailed analysis of the number of learners undertaking apprenticeships of direct relevance to the automotive industry job families by sub-region can be found in Appendix 3.

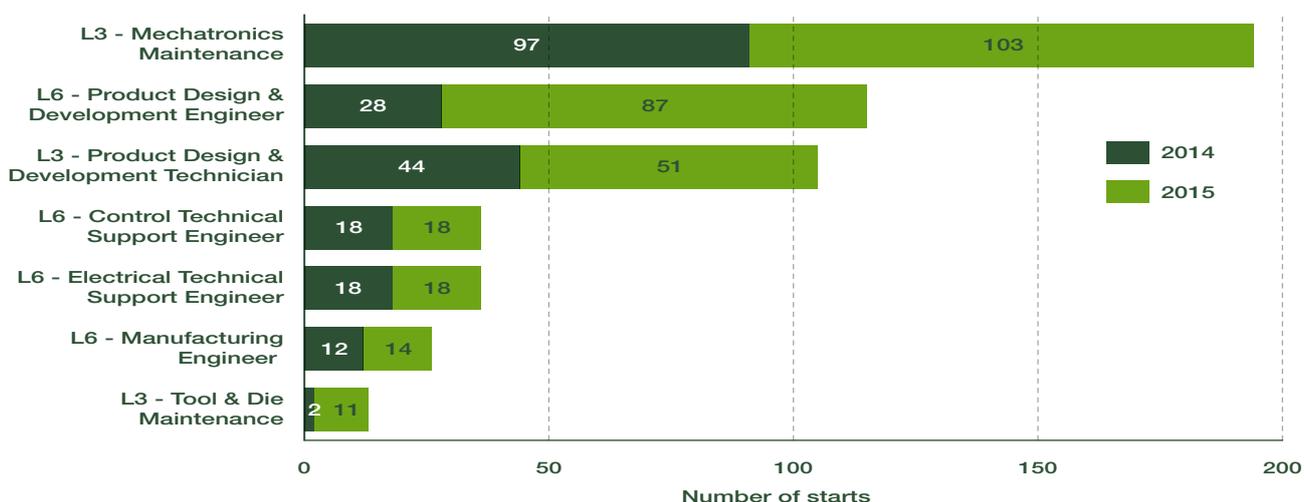
As expected, there is quite a close relationship between apprenticeship provision and regional concentrations of automotive employment, with the West Midlands, South East and North West having the greatest number of apprentices undertaking apprenticeship frameworks directly relevant to the automotive sector. This relationship also tends to be reflected at a sub-regional, LEP level, with concentrations of apprentices occurring in the North East LEP, Derbyshire and Nottinghamshire, Leeds City and Greater Birmingham and Solihull LEP areas.

4.2.3 Automotive Trailblazer Standards

Although numbers of apprentices working towards the new automotive trailblazer apprenticeship standards are relatively small at present, numbers are starting to pick up. Chart 5 shows that between 2014 and 2015, there were a total of 521 starts across a range of subject areas, with the most popular being:

- Product Design and Development (Level 3 and Level 6) - relating to the Engineering ‘Design and Development’ employment sub-family
- Mechatronics Maintenance (Level 3) - relating to the Manufacturing ‘Maintenance’ employment job family

Chart 5: Number of automotive trailblazer apprentice starts



Source: Automotive Trailblazer Group

A number of these standards will help to address some of the top current and future skill shortages impacting on the industry, particularly in relation to Computer Aided Design, Mechatronics, Manufacturing Process Knowledge and Quality Core Tools Training.

4.2.4 Apprenticeship Levy

The apprenticeship levy will come into effect in April 2017. It will be payable by employers in the UK at 0.5% of their total pay bill.

All employers will receive an allowance of £15,000 to offset against payment of the levy. This effectively means that the levy will only be payable on a wage bill in excess of £3 million per year. Based on average wages and employment size structure within the automotive sector, Semta has estimated that the annual levy payments by automotive employers within England, taking into account allowances, will be about £19.5 million¹¹. The West Midlands region will comprise about £7.5 million of this total and the North West and North East a further £2.65 million and £2.45 million respectively.

The apprenticeship levy principles of everybody contributing and all employers taking apprenticeships more seriously should be applied to encourage uptake across the sector, around a range of skills. This may help boost resources devoted to apprenticeships within the automotive sector and underlines the importance of ensuring available apprenticeship frameworks are fit for purpose to tackle current and ongoing skill shortages and recruitment needs.

4.3 Other FE and Private Training Provision

In respect to non-apprenticeship FE and private training provision relevant to the automotive industry, during 2014/15 there were a total of nearly 112,000 learners in England.¹²

Each relevant learning aim was matched to an automotive job family on a 'best fit' basis. There were 63,000 non-apprenticeship learners undertaking training relevant to the Manufacturing job family and 48,000 learners within the Engineering job family. Relatively low numbers of learners were identified for the Materials Planning and Logistics (1,250 learners) and Quality job family (140 learners)¹³, indicating a potential lack of provision in these areas.

In terms of the regional distribution of non-apprentice learners serving the automotive industry, although there is a relationship between learner numbers and employment concentrations, this is not precise, with the West Midlands (the largest concentration of automotive employment) lagging behind the North West in terms of learner numbers.

4.4 Numbers of Training Providers

In total, there are approximately 1,700 training providers across HE and FE (colleges and private training providers) that have learners studying subjects relevant to the automotive sectors. The majority of regions have approximately 200 providers, with the North East and South West having the least.

However, the importance of employers engaging with key providers is highlighted by the fact 49% of apprentices in England are linked to just 8% of providers, with 62% of non-apprentice learners linked to 12% of providers.

This underlines the importance of employers engaging effectively with key providers in each region to ensure that they deliver the right types of learners, with the right type of skills and qualifications, in sufficient volumes, to meet their current and future needs.

A more detailed regional/sub-regional LEP breakdown of total numbers of providers (FE, private training providers and HE) can be found in Appendix 5.

5 Adequacy of Training Provision Serving the Automotive Sector

5.1 Assessment of provision by type of provider

To provide a measure of the adequacy of provision serving the automotive industry in different regions and sub-regions, numbers of learners by type of provision have been compared with numbers employed within the sector in these occupations.

A low ratio indicates a poorly developed local automotive training provider infrastructure relative to numbers employed in the sector locally and a higher than average ratio, a relatively well developed local training provider infrastructure.

Table 2: Assessment of over or under-provision by type of provision and region

Region	Provision type		
	HE	Apprenticeships	Non-apprenticeships FE and Private Provision
Greater London	Well above average	Above average	Well above average
East of England	Above average	Well above average	Well above average
South West	Above average	Well above average	Above average
Yorkshire and The Humber	Above average	Well above average	Above average
South East	Above average	Well above average	Above average
East Midlands	Above average	Well above average	Above average
North West	Below average	Above average	Above average
North East	Below average	Below average	Above average
West Midlands	Well below average	Well below average	Well below average

Source: HEFCE, SFA/Semta Local Automotive Employment Model: Note: The figures are based on numbers of learners undertaking training relevant to the job families as a proportion of those employed in these job families.

5.2 Overall assessment of provision

Table 3 summarises these three strands of provision as an overall ratio (learners undertaking training relevant to the Engineering, Manufacturing, Materials Planning and Logistics and Quality automotive job families as a proportion of numbers employed in these automotive job families by region).

Table 3: Overall assessment of over or under-provision by region

Region	Overall assessment of provision
Greater London	Well above average
East of England	Well above average
South West	Above average
Yorkshire and The Humber	Above average
South East	Above average
East Midlands	Above average
North West	Above average
North East	Below average
West Midlands	Well below average

Taking all relevant provision together including higher level provision, the ratios for Greater London and East of England indicate a relatively high concentration of relevant training provision compared to numbers employed, whereas the West Midlands which has a high concentration of automotive employment is not fully reflected in overall training provision serving the automotive industry.

At a sub-regional LEP area level (further analysis can be found in Appendix 6), the overall ratio of automotive learners to employment is:

- Highest for those LEP areas with a significant automotive sector employment (more than 1,000 employed) in the LEP areas of Greater Manchester, Lancashire and Solent, all well above the national average.
- Lowest in the LEP areas of Coventry and Warwickshire, Swindon and Wiltshire, Worcestershire, Cheshire and Warrington and Greater Birmingham and Solihull, all with significant concentrations of automotive sector employment, but an automotive learner employment ratio well below the national average. These figures indicate a relatively poorly developed local automotive training infrastructure compared to the concentrations of automotive employment in these areas.

6 Conclusions and Recommendations

This project has highlighted how difficult it is for employers and providers together with other bodies such as LEPs to:

- Identify the range of provision available to support automotive employers at Level 2, 3 and 4+
- Understand the specific content of relevant provision that is available and the extent to which this actually addresses specific requirements of automotive employers
- Gauge the quality of this provision.

Use the analysis from this research to support the development of cross LEP/regional initiatives to improve provision in localities of strategic importance to the automotive industry that lag behind in the scale of provision serving local employer needs.

A number of LEP areas have significant concentrations of automotive employment, but apprenticeship, FE and other provision lags behind other areas in terms of meeting local employer skills demand. Although each locality faces its own unique circumstances, many common needs and challenges will cut across these geographies. It is proposed that this research is used to provide a strategic framework to prioritise development of cross LEP/regional initiatives to improve provision.

The evidence points to a lack of coordination across LEP areas and regions in delivery of training support to meet the needs of Advanced Manufacturing employers, including the automotive sector. For the automotive sector to be successful, underlying provision and cultural issues also need to be fixed in the wider Advanced Manufacturing and Engineering sector. While Advance Manufacturing is identified as a priority by many LEPs, there is little coordination of activity to address these issues either across LEP areas within the same region or across regions, even though employers face issues that transcend these geographies. There is an opportunity to encourage LEPs with significant automotive employment to develop a more joined up approach, such as the Midlands Engine for Growth and Combined Authorities to facilitate consistency of actions on skills across LEPs and avoid duplication of effort in addressing local skill requirements impacting on the automotive sector.

Promotion of the trailblazer automotive apprenticeship standards

A number of apprenticeship standards have been developed by key automotive employers through the trailblazer process. It will be important to ensure these new industry standards together with the Automotive Apprenticeship Matching Service are promoted widely to encourage greater apprenticeship uptake and address key skills shortages.

Employer engagement with key learning providers

Although there are a significant number of providers, the majority of learning is delivered through a relatively small number of providers. It is vital that employers and other stakeholders identify and engage with these key providers to ensure they have the capacity and capability to deliver the required skills, qualifications and learner numbers to meet employer demand. Establishment of a forum that brings together automotive employers and key providers would support this goal and help avoid duplication across LEP areas.

Improve provision focussed on identified skill shortage areas

The Automotive Industrial Partnership should work strategically with learning providers to grow provision in skills shortage areas where there is scope to improve current provision, such as Programmable Logic Control, Robotics, Advanced Problem Solving, Computer Aided Engineering, Quality Core Tools Training and Manufacturing Process Knowledge, Robotics, Welding and Management Leadership (including expanding the ProLead management and leadership programme which is currently being piloted).

Maximising the value of the Apprenticeship Levy

Ensure that employers are fully aware of the apprenticeship support available, everybody contributes and all employers take apprenticeships more seriously, so that resources from the Apprenticeship Levy are focussed on provision that maximises up-skilling in priority areas for employers. This implies coordination of the ongoing work of the Automotive Industrial Partnership with NAS, the Automotive Apprenticeship Matching Service and key employers involved in developing the Trailblazer Automotive Standards.

Implement a focussed programme of primary research building on the analysis undertaken for this report

Although the programme of work underpinning this report provides a robust basis for the findings outlined, more detailed primary research with:

- Employers would enable greater understanding of which different areas of provision actually meet employer requirements in terms of (a) tackling identified skill shortages (b) providing an adequate skills base to meet recruitment needs for different job roles.
- Providers would enable greater understanding of the content of different provision serving the automotive sector and how this content meets specific employer requirements and ways it needs to change to meet these requirements more effectively.

Develop a centralised intelligence resource on provision serving the automotive industry

This research has involved the development and implementation of innovative approaches to using data from HE, FE, apprenticeship and other provision serving the automotive sector. This has highlighted the benefits of maximising the use of information from HEFCE, SFA, NAS and others to understand the range of current provision. The research has also highlighted current difficulties in identifying the specific content of available courses, the extent this meets specific employer requirements and to gauge the quality of this provision.

This work provides a solid foundation for the further development of an aggregated resource on provision available to all regional stakeholders to underpin practical action to help the industry tackle key skills issues and changing recruitment requirements. It is recommended that the Automotive Industrial Partnership build on the work already undertaken in partnership with HEFCE, SFA, NAS and other interested bodies, building on the lessons from similar initiatives in other sectors.¹⁴ The purpose of this intelligence resource would be to provide an easily accessible way to identify relevant provision available locally, regionally and nationally, the extent to which particular provision addresses specific employer requirements and also provide an indication of the quality of support delivered.

7 References

- 1 This figure excludes manufacture of trailers and caravans.
- 2 Source: Labour Insight, Burning Glass Technologies.
- 3 Employers' Views of the Jobs and Skills Required for the UK Automotive Industry, Automotive Industrial Partnership, Sara Bettsworth, SMMT Industry Forum, Phil Davies, BIS February 2016.
- 4 The automotive job families defined by SMMT as part of this project have been used as the starting point for this analysis. These have then been matched to the nationally recognised ONS Standard Occupational Categories (SOCs) in order to undertake the analysis.
- 5 This has involved coding data relating to just over 718,000 learning aims supplied by the SFA relating to learning undertaken through FE colleges, private training providers and apprenticeships. Learning undertaken through Universities and other HEIs has not been included in this analysis as the level of detail provided by HEFCE was not adequate to match provision to areas of identified skill shortage.
- 6 It should be noted that this analysis relates to the number of qualifications or learning units being undertaken and not number of learners.
- 7 Relevant HE courses have been matched to each Automotive job family using data relating to the Joint Academic Coding System (JACS) used by Universities to code course provision.
- 8 ProLead is an innovative new training programme designed to increase the management talent pool in the automotive industry and was pioneered by BMW and Jaguar Land Rover on behalf of the Automotive Industrial Partnership. Driving up skills in critical manufacturing leadership positions will play a vital role in boosting productivity and competitiveness in the sector.
- 9 This figure excludes learners that could not be matched to a region in England in relation to the location of learning being undertaken.
- 10 Only 23 apprentices were assigned to the Materials Planning and Logistics job family.
- 11 The average salary is based on figures from the Annual Survey of Hours and Earnings 2015, which gives a mean Gross Weekly Earnings figure for Great Britain for employees within the Manufacture of Motor Vehicles sector of £823.10. This has been multiplied by 52 to get an annual figure.
- 12 This figure excludes apprentices and those undertaking higher level provision and also excludes learners that could not be matched to a region in England in relation to the location of learning being undertaken.
- 13 Learners often undertake more than one learning aim. These figures are based on the match between a learner's first learning aim and automotive job families.
- 14 The Skills for Care and Development LfL (Learn from Learning) initiative designed to address the information deficit relating to provision available to support skills development within the Care sector.

This research was carried out by Semta on behalf of the Automotive Industrial Partnership. Publication of this report was developed by Semta with support from the Higher Education Funding Council for England, the Skills Funding Agency and the National Apprenticeship Service. The research was partly supported by HM Government with Employer Ownership Funding.

Semta brings together more than 146,000 companies to deliver skills to the UK's world class advanced manufacturing and engineering sector. With over 50 years experience, our expertise makes us the go-to organisation for ensuring national occupational standards and apprenticeship frameworks are fit-for-purpose.

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Jo Lopes, Chair of the Automotive Industrial Partnership
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The North East Automotive Alliance
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Semta

Al Parkes – Chief Operating Officer
Dawn Hirst – Marketing Manager
Joanne Icton – Head of Communications and Public Affairs
Michelle Henderson – Contracts Manager
Mick Feloy – Associate
Reg D'Souza – Research and CRM Specialist

Appendices

Appendix 1

The Automotive Industry Job Framework

Job Family	Typical routes to entry	Engineering (ENG)				Materials Planning & Logistics (MPL)			
Sub Family		Research (RES)	Design & Development (DES)	Programmes (PRG)	Production Engineering (PRE)	Capacity Planning (CP)	Materials Planning (MP)	Logistics (LOG)	Warehouse (WAR)
Career Stage 6 (Executive)	Masters Degree, Degree Apprenticeship, NVQ Level 7, Institute Fellow, Chartered Status	Head of Engineering (E006) Head of Programmes (EPRG006) Head of Styling (ESTY006)				Head of Materials Planning & Logistics (MPL006)			
Career Stage 5 (Senior Management)	Honours Degree, Degree Apprenticeship, HND, Technical Certificate Level 5, NVQ Level 5, NVQ Level 6, Incorporated Status	Chief Engineer (ERES005E) Research Manager (ERES005)	Chief Engineer (EDES005) Design & Development Manager (EDESDEV005) Chief Stylist (EDESSTY005)	Programme Manager (EPRG005)	Production Engineering Manager (EPRE005)	Capacity Planning Manager (MPLCP005)	Materials Planning Manager (MPLMP005)	Logistics Manager (MPLOG005)	Warehouse Manager (MPLWAR005)
Career Stage 4 (Professional/Management)	Degree / Degree Apprenticeship, Foundation Degree, HNC, Technical Certificate Level 4, Higher Professional Diploma, NVQ Level 4, Technician Status	Principal Engineer (ERES004.2) Technical Expert Research Engineering (ERES004)	Principal Design Engineer (EDES004.2) Principal Development Engineer (EDESDEV04.2) Principal Technical Specialist Engineer (EDES004) Principal Stylist (EDESSTY004.2)		Principal Engineer (EPRE004.2) Technical Specialist Production Engineer (EPRE004)				Warehouse Shift Manager (MPLWAR004)
Career Stage 3 (Technical)	Degree / Degree Apprenticeship, HNC, A Levels, Technical Certificate Level 3, NVQ Level 3, Technician Status	Senior Research Engineer (ERES003)	Senior Design Engineer (EDES003.1) Senior Development Engineer (EDESDEV003.1) Senior Technical Specialist Engineer (EDES003.1) Senior Stylist (EDESSTY003.1) Senior Modeller (EDESSTY003.0)	Senior Project Engineer (EPRG003.1)	Senior Production Engineer (EPRE003)	Senior Capacity Planner (MPLCP003.1)	Senior Materials Planner (MPLMP003.1)	Logistics Analyst (MPLOG003)	Warehouse Supervisor (MPLWAR003)
		Research Engineer (ERES003)	Design Engineer (EDES003) Development Engineer (EDESDEV003) Technical Specialist Engineer (EDES003) Stylist (EDESSTY003)	Project Engineer (EPRG003)	Production Engineer (EPRE003)		Materials Planning Analyst (MPLMP003)		
		Higher Apprenticeship Product Design & Development Engineer Trailblazer (Level 6) (EDES003.0)		Graduate Engineer (Placement) (EPRG003.0)	Higher Apprenticeship Manufacturing Engineer Trailblazer (Level 6) (EPRE003.0)	Graduate Capacity Planner (Placement) (MPLCP003.0) ^{**}	Graduate Material Planner (Placement) (MPLMP003.0)		
		Higher Apprenticeship Manufacturing Engineering (Level 4)							
Career Stage 2 (Hourly/Senior Admin)	GCSEs Level A-C, NVQ Level 2, Technical Certificate Level 2	Technician - Development (ERES002)	Modeller (EDESSTY002) Technician (EDESDEV002)		Technician (EPRE002)	Capacity Planner (MPLCP002)	Materials Planner (MPLMP002) ^{**}	Logistics Co-ordinator (MPLOG002)	Warehouse Team Leader (MPLWAR002)
Career Stage 1 (Hourly/Admin)	GCSEs Level D-G, Functional Skills Level 1, NVQ Level 1								Warehouse Operator (MPLWAR001)
School Leaver including 6th Form	A Levels, GCSEs Level A-C, Functional Skills Level 2	Apprentice Product Design & Development Technician Trailblazer (Level 3) (EDES00) Apprentice Clay Modeller Level 3 (EDESSTY00)							

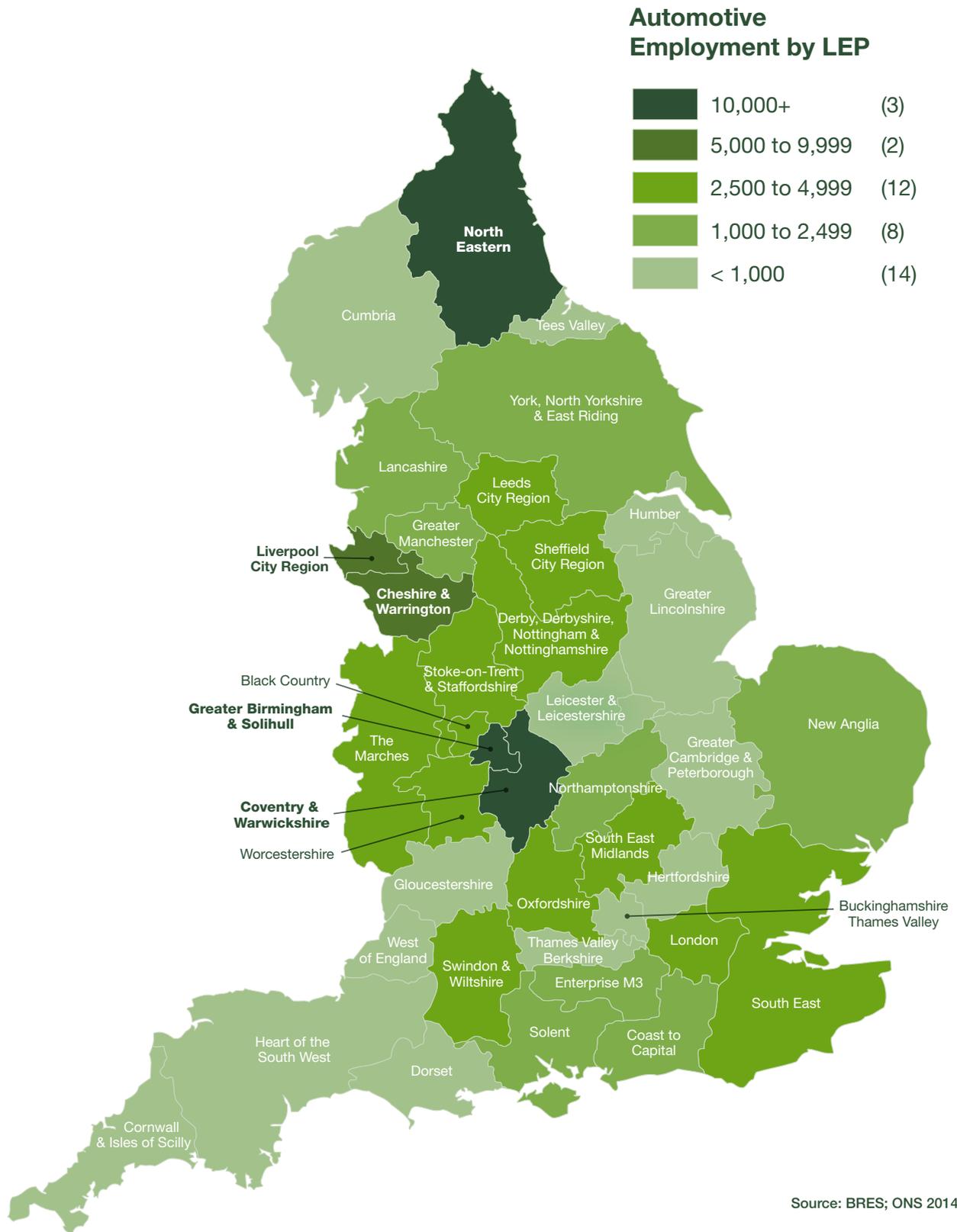
Source: *Employers' Views of the Jobs and Skills Required for the UK Automotive Industry*, Automotive Industrial Partnership, Sara Bettsworth, SMMT Industry Forum, Phil Davies, BIS February 2016. Updated by Semta April 2016.

Purchasing (PU)		Quality (Q)				Manufacturing (MFG)				
Procurement (PR)	Cost Estimating (CE)	Management Systems (MS)	Supplier Quality (SQ)	Quality Assurance (QA)	Operations (OPS)	Manufacturing (MAN)	Assembly (ASS)	Tool Making (TOO)	Maintenance (MAI)	Lean Manufacturing (LEA)
Head of Purchasing (PU006)		Head of Quality (Q006)				Head of Manufacturing (MFG006)				
Procurement Manager (PUPR005)	Cost Estimating Manager (PUCE005)	Quality Systems Manager (QMS005)	Supplier Quality Manager (QSQ005)	Quality Manager (QOPS005)		Manufacturing Manager (MFG005)			Lean Manufacturing Manager (MFGLEA005)	
Senior Buyer (PUPR004.2)x Senior Technical Procurement Buyer (PUPR004.1)	Senior Engineer (PUCE004)		Senior Supplier Quality Engineer (QSQ004.1)	Warranty Engineer (QQA004.1)	Senior Quality Engineer (QOPS004.1)	Production Shift Manager (MFGMAN004)	Assembly Shift Manager (MFGASS004)	Tool Room Manager (MFGTOO004)	Maintenance Manager (MFGMAI004)	Lean Master Practitioner (MFGLEA004)
Buyer (PUPR003.2)	Technical Production Buyer (PUPR003)	Quality Engineer (QMS003)	Supplier Quality Engineer (QSQ003)	Resident Customer Support Engineer (QQA003)	Quality Engineer (QOPS003)	Production Supervisor (MFGMAN003)	Assembly Supervisor (MFGASS003)	Senior Tool Maker (MFGTOO003)	Maintenance Team Leader (MFGMAI003.2)	Senior Lean Practitioner (MFGLEA003)
Supplier Development Engineer (PUPR003E)	Cost Estimating Engineer (PUCE003)								Senior Technician (MFGMAI003.1)	
Graduate Buyer (Placement) (PUPR003.0)	Graduate Cost Estimating Engineer (Placement) (PUCE003.0)				Graduate Engineer (Placement) (QOPS003.0)	Higher Apprenticeship Manufacturing Engineer Trailblazer (Level 6) (MFGMAN003.0) Higher Apprenticeship Manufacturing Engineering (Level 4)				
									Higher Apprenticeships Control/Technical Support Engineer (MFGMAI003.0) Electrical/Electronic Technical Support Engineer (MFGMAI003.00) 2 Trailblazers (Level 6)	
Assistant Buyer (PUPR002)				Warranty Technician (QQA002)	Quality Technician (QOPS002)	Team Leader (MFGMAN002.2) Senior Operator (MFGMAN002.1)	Team Leader (MFGASS002.2) Senior Operator (MFGASS002.1)	Tool Maker (MFGTOO002)	Maintenance Technician (MFGMAI002)	Lean Practitioner (MFGLEA002)
						Operator (MFGMAN001)	Operator (MFGASS001)			
						Apprentice Machinist - Advanced Manufacturing Engineering Trailblazer (Level 3) (MFGMAN00)	Apprentice Engineering Manufacture Level 3 (MFGASS00)	Apprentice Toolmaking, Tool & Die Maintenance Trailblazer (Level 3) (MFGTOO00)	Apprentice Mechatronics Maintenance Technician Trailblazer (Level 3) (MFGMAI00) Apprentice Electrotechnical (Level 3) (MFGMAI00.0)	

Appendix 2

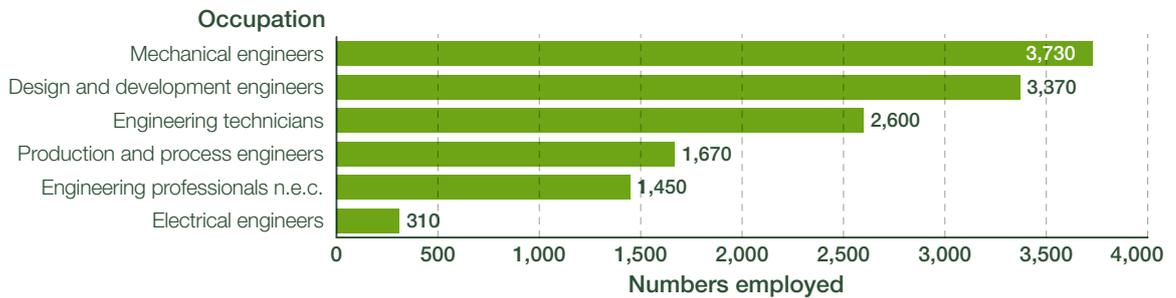
Automotive employment and vacancies by sub-region

Numbers employed within the automotive industry within England by LEP area

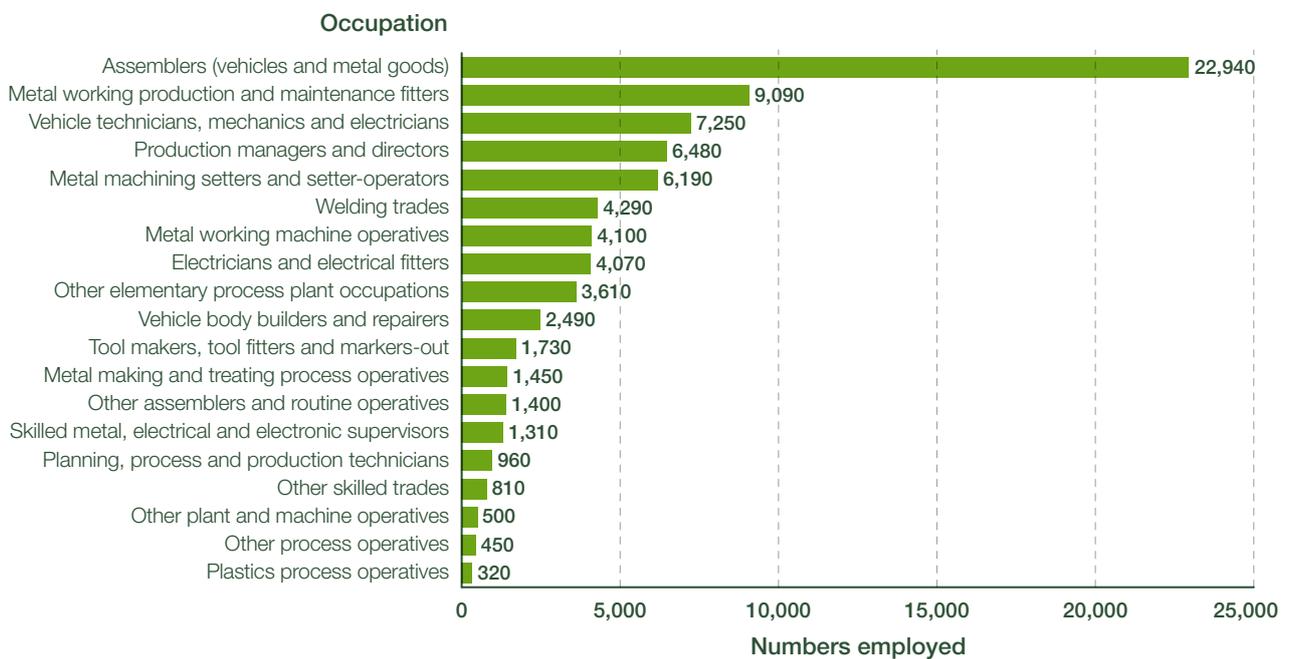


Source: BRES; ONS 2014

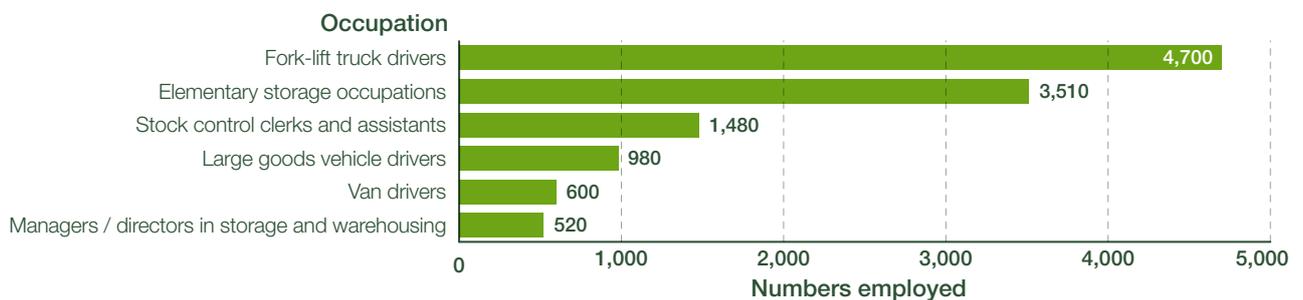
Numbers employed in the Engineering job family by occupation



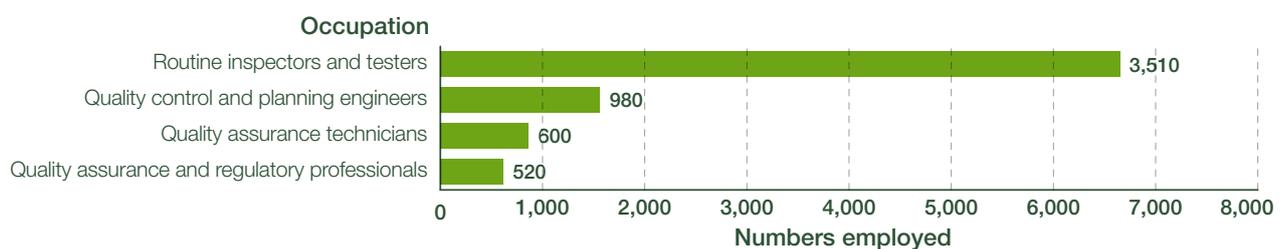
Numbers employed in the Manufacturing job family by occupation



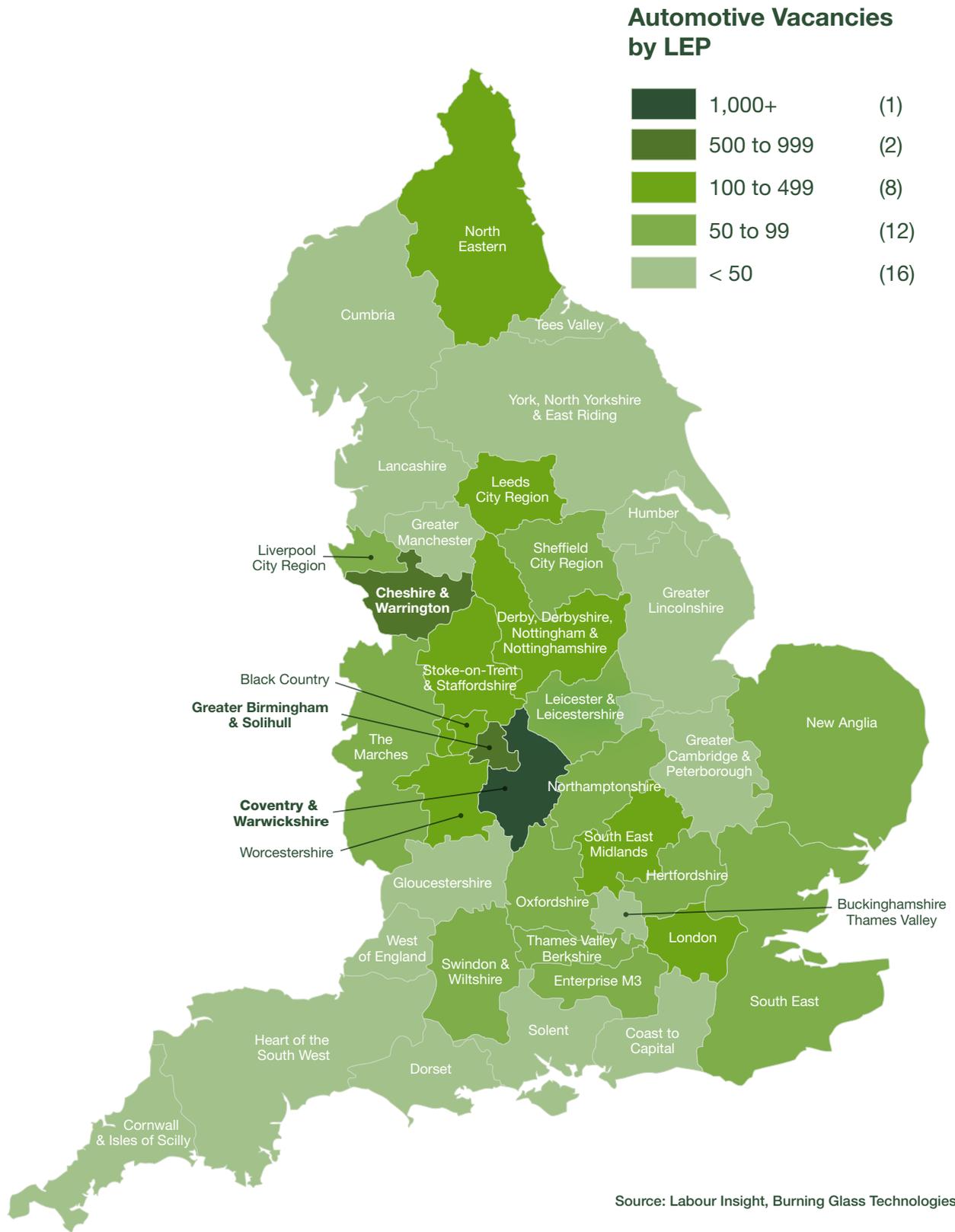
Numbers employed in the Materials Planning and Logistics job family by occupation



Numbers employed in the 'Quality' job family by occupation



Numbers of automotive vacancies over the year to 1st October 2015 by LEP area

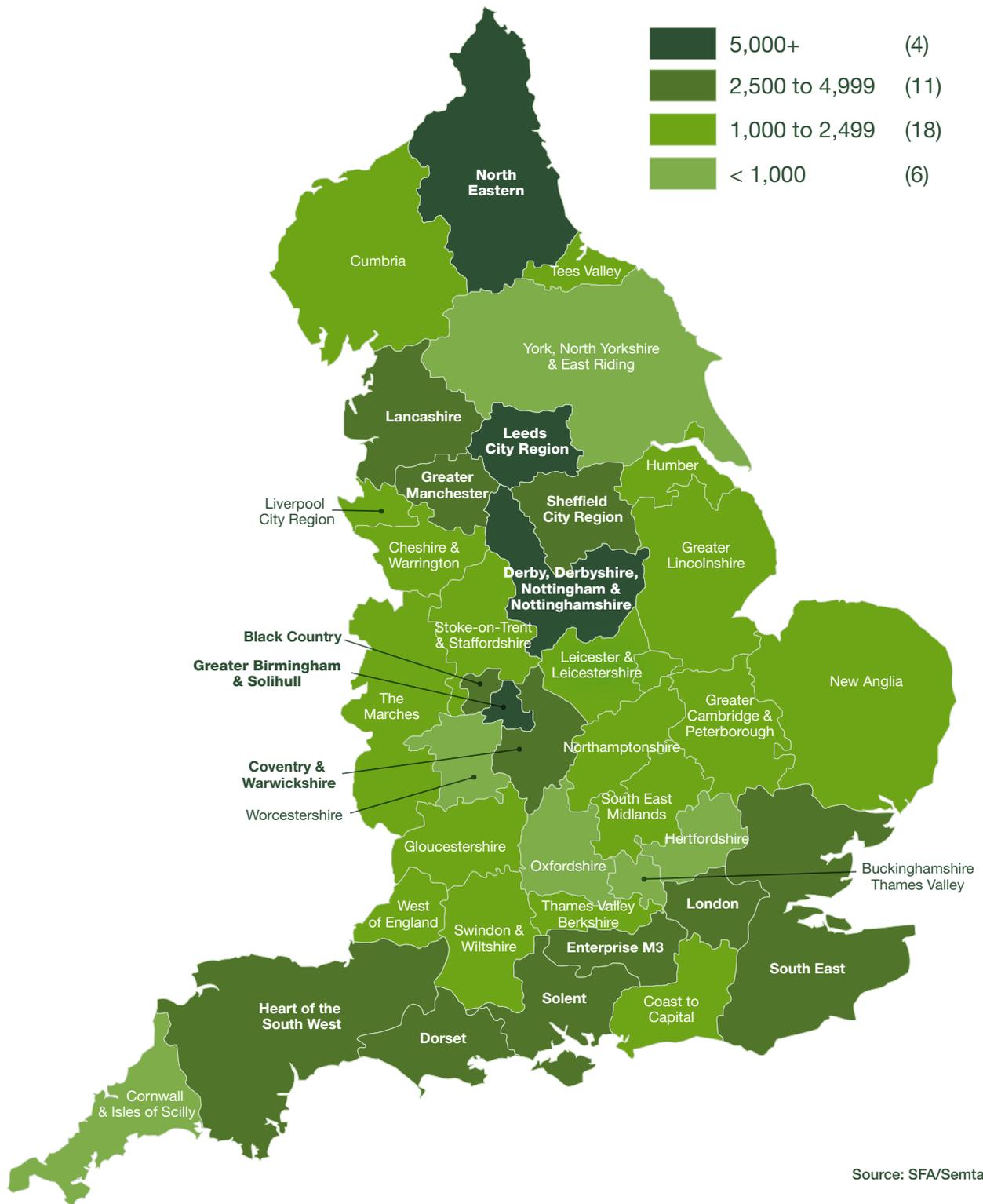


Source: Labour Insight, Burning Glass Technologies

Appendix 4

Total number of learners undertaking training relevant to the automotive industry

Apprentices at FE or Private Training Providers Engineering, Manufacturing & Quality Job Families by LEP

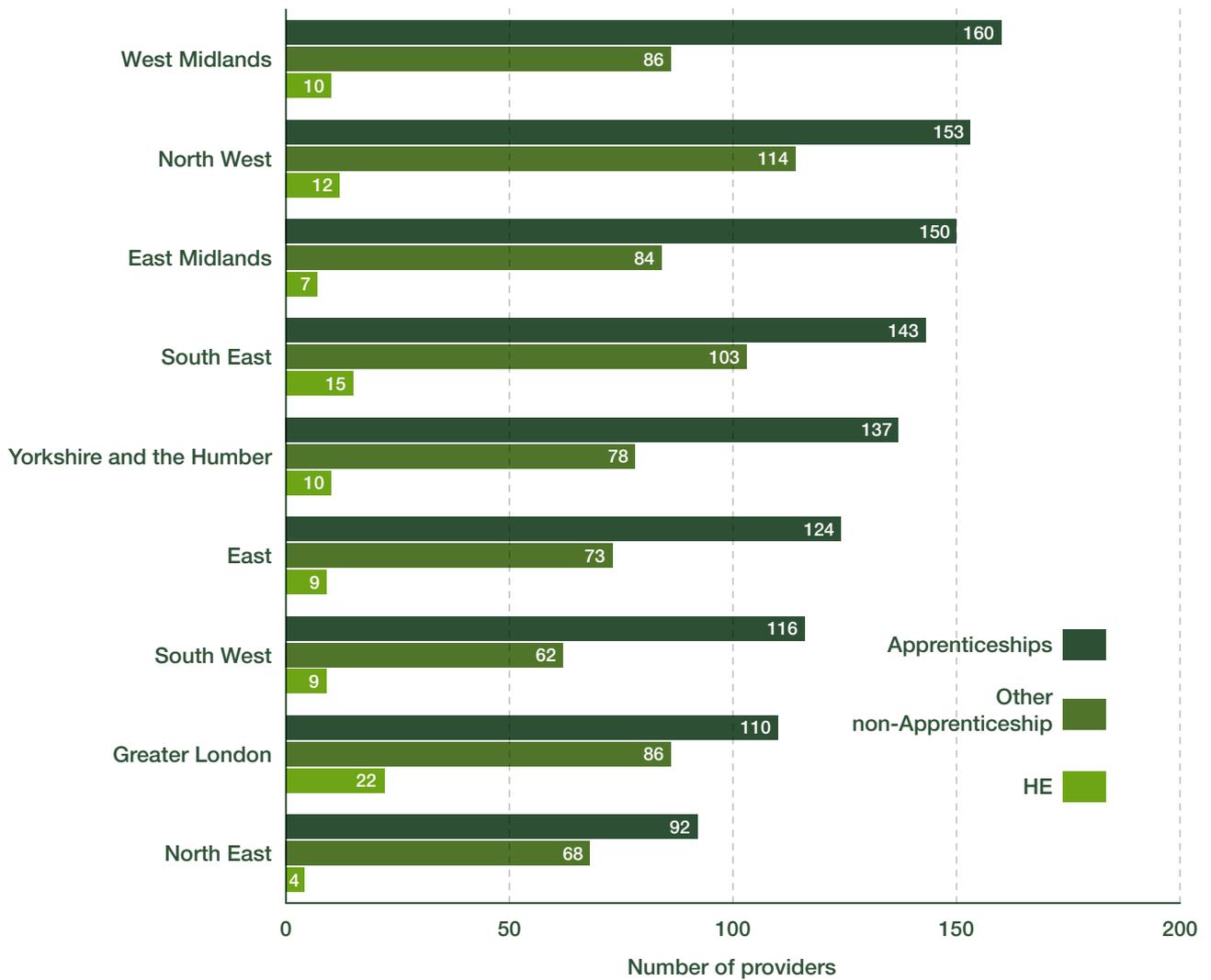


Source: SFA/Semta

Appendix 5

Numbers of providers by type of provision and sub-region

Numbers of providers by learner type

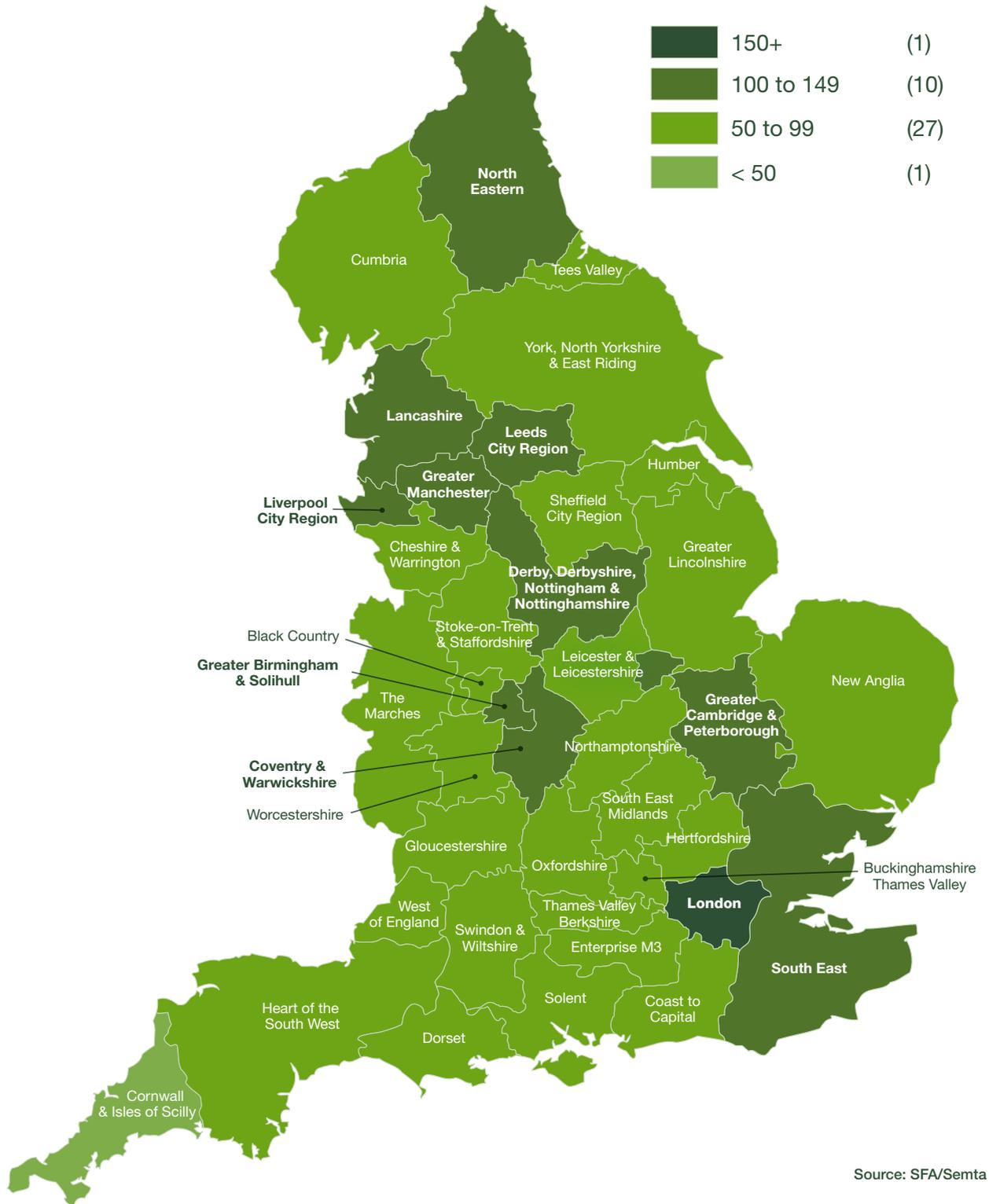


Source: SFA/Semta

Note: In terms of regions, the total number of providers by learner type is generally greater than the total number of providers used within the regional summaries, as some providers have more than one type of learner.

Total number of FE college, Private Training and HE Providers by LEP area

Number of FE College, Private Training & HE Providers by LEP



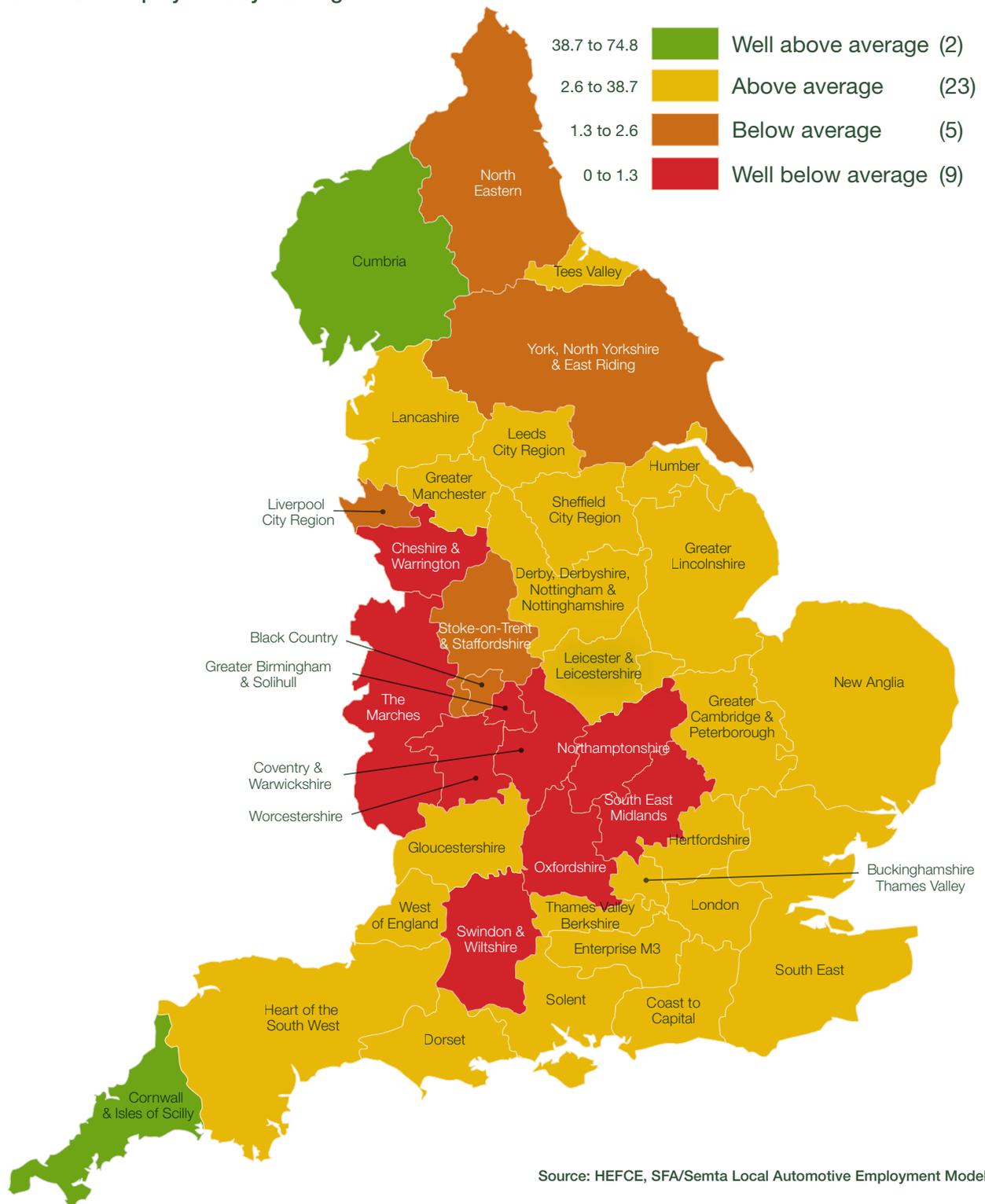
Source: SFA/Semta

Appendix 6

Adequacy of overall training provision by sub-region

Ratio of all HE, FE, apprentice and other learners undertaking training relevant to the automotive industry as a proportion of automotive employment by sub-region

Adequacy of Provision Learner to Employment Ratio by LEP

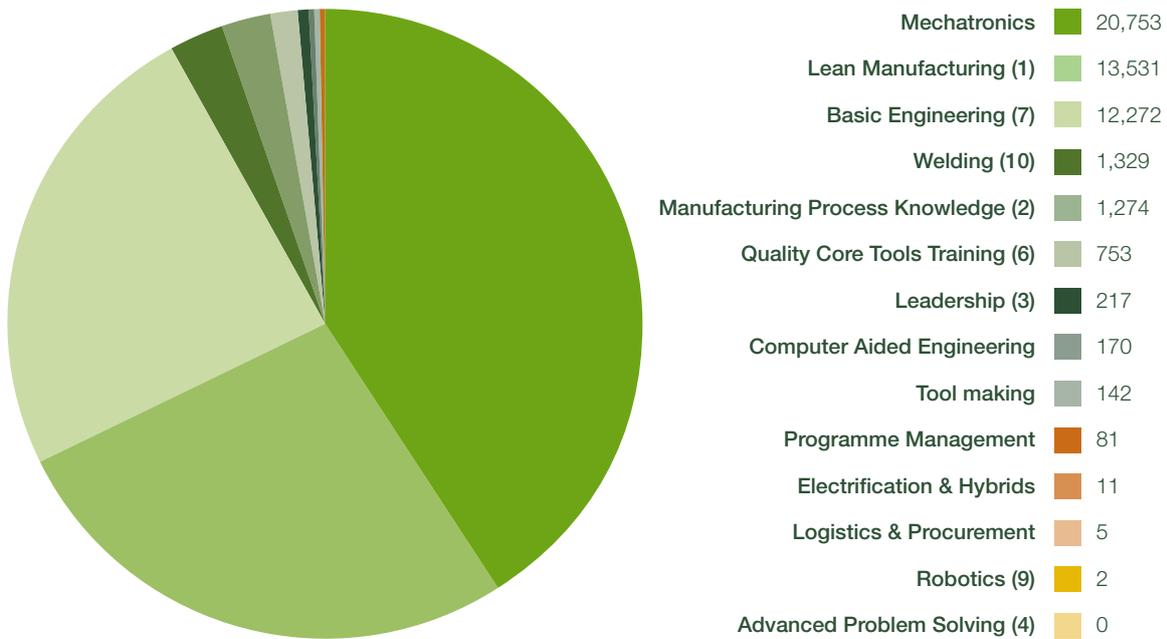


Appendix 7

Regional Summaries

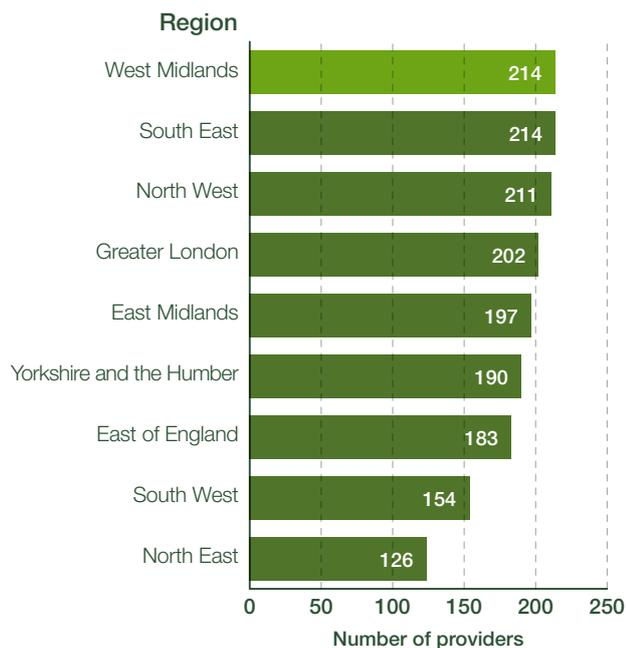
West Midlands

Volume of learning provision in the West Midlands of relevance to key skill shortage areas



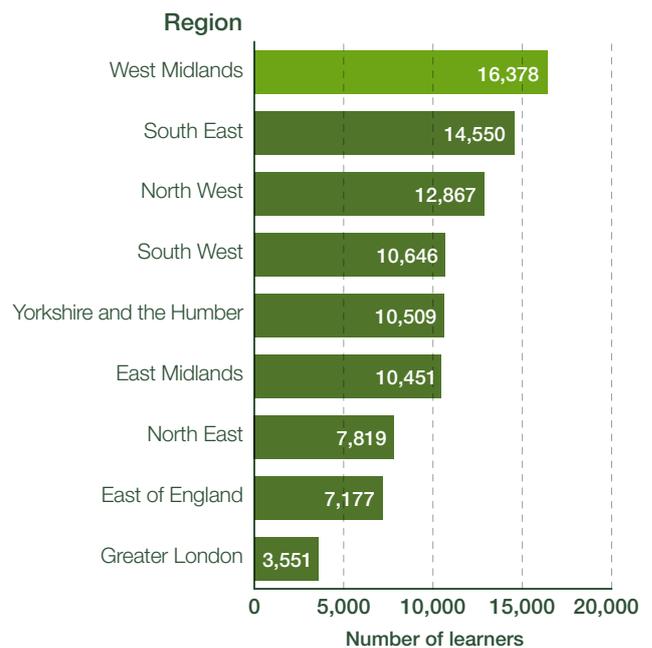
Source: Skills Funding Agency/Semta; The above analysis is based on the number of 'learning aims' being undertaken rather than number of learners – The figures in brackets relate to the rank of importance of each future/ongoing skill shortage area nationally as identified by employers.

Total number of providers relevant to the automotive sector



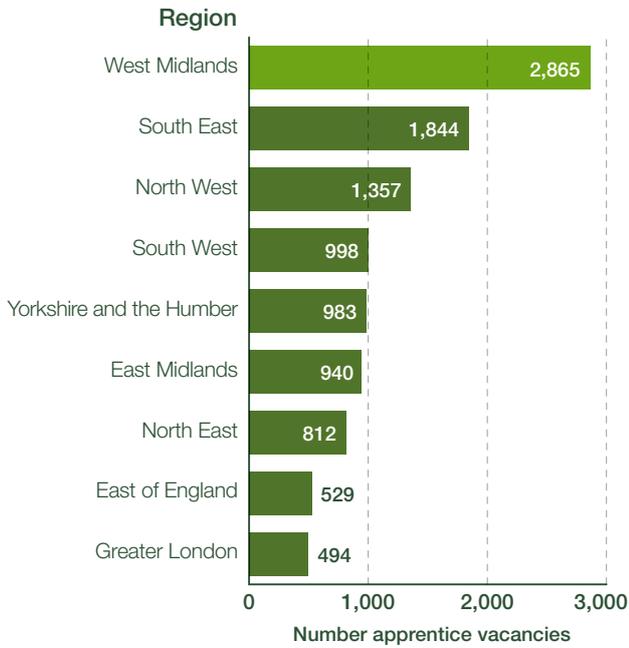
Source: SFA

Number of apprentices relevant to Manufacturing, Engineering & Quality job families



Source: SFA

Number of apprenticeship vacancies



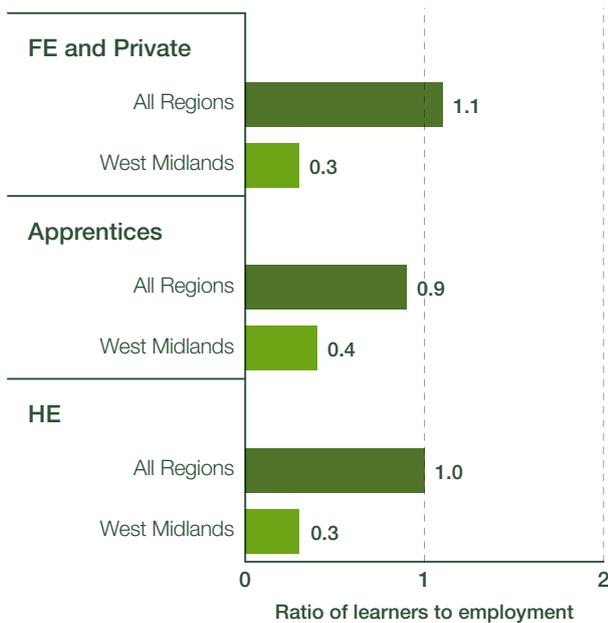
Source: NAS

Estimated annual Apprenticeship Levy payments (£ million) by automotive sector



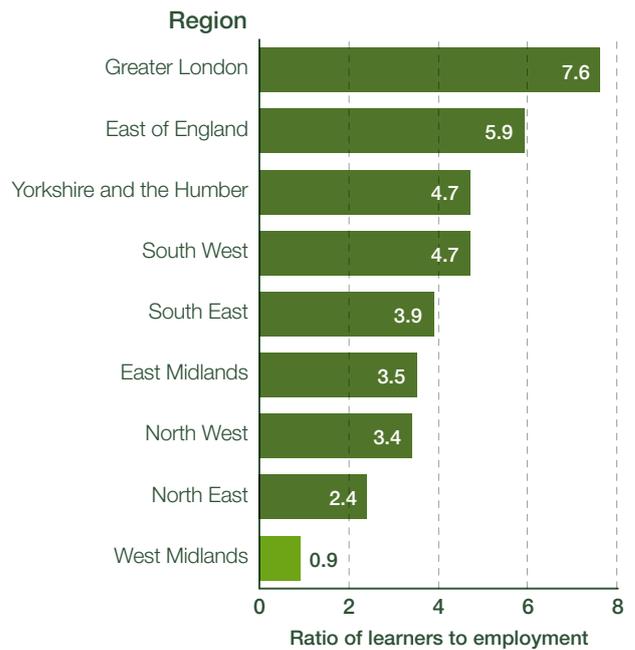
Source: Annual Survey of Hours and Earnings 2015/Office for National Statistics

Ratio of learners to employment; FE and private, Apprentices and HE - West Midlands compared with national average



Source: SFA/HEFCE/Semta

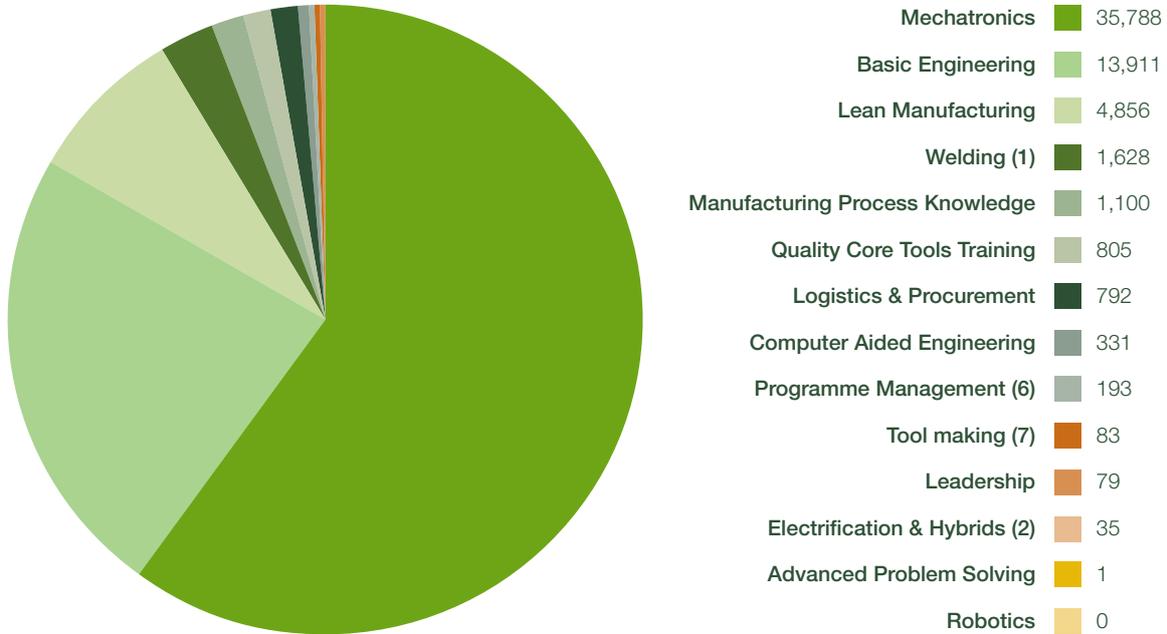
Ratio of learners to automotive employment by Region



Source: SFA/HEFCE/Semta

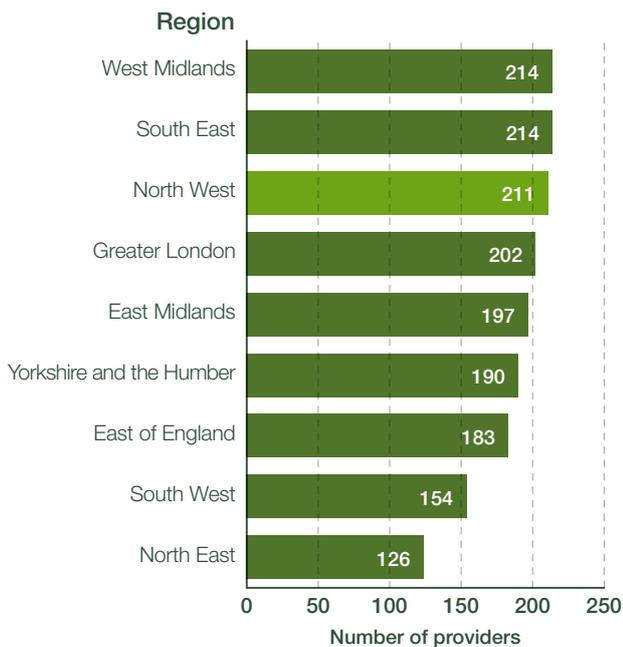
North West

Volume of learning provision in the North West of relevance to key skill shortage areas



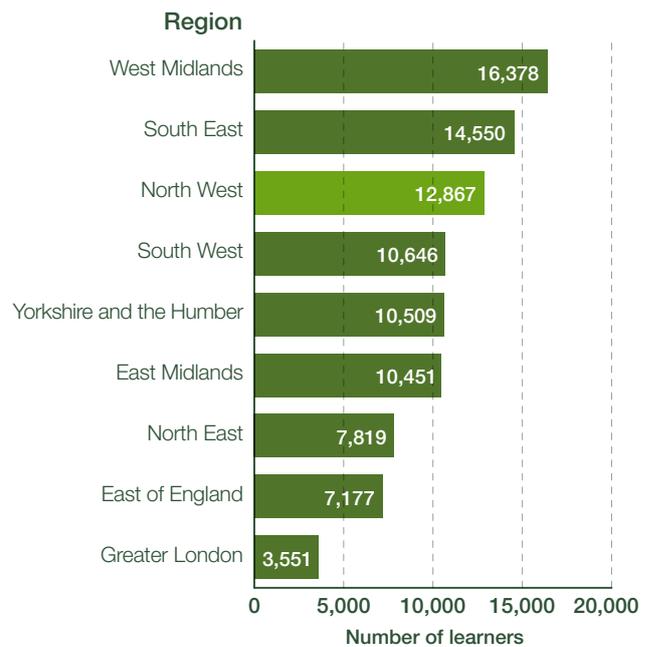
Source: Skills Funding Agency/Semta; The above analysis is based on the number of 'learning aims' being undertaken rather than number of learners – The figures in brackets relate to the rank of importance of each future/ongoing skill shortage area nationally as identified by employers.

Total number of providers relevant to the automotive sector



Source: SFA

Number of apprentices relevant to Manufacturing, Engineering & Quality job families



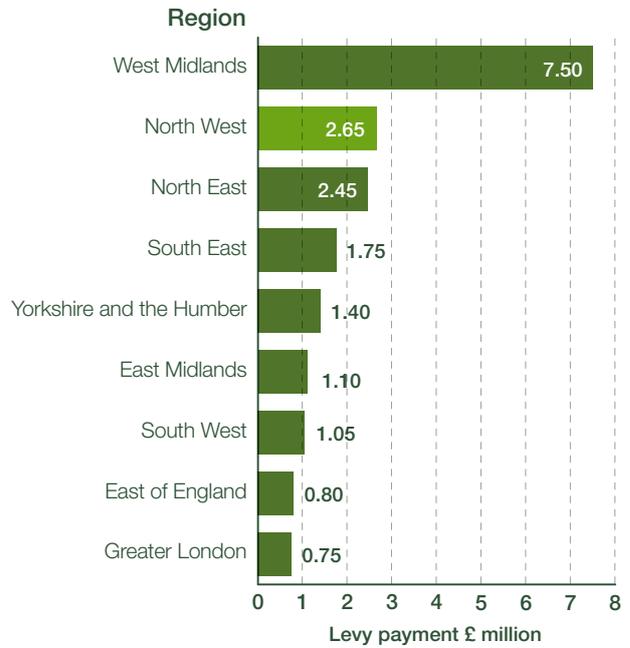
Source: SFA

Number of apprenticeship vacancies



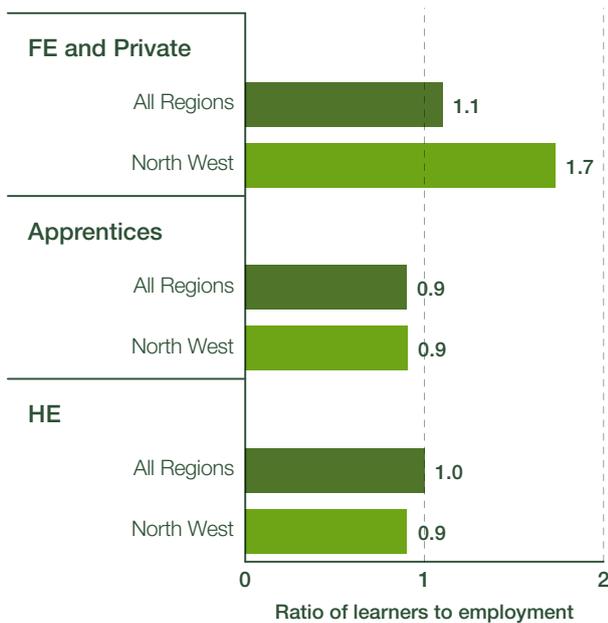
Source: NAS

Estimated annual Apprenticeship Levy payments (£ million) by automotive sector



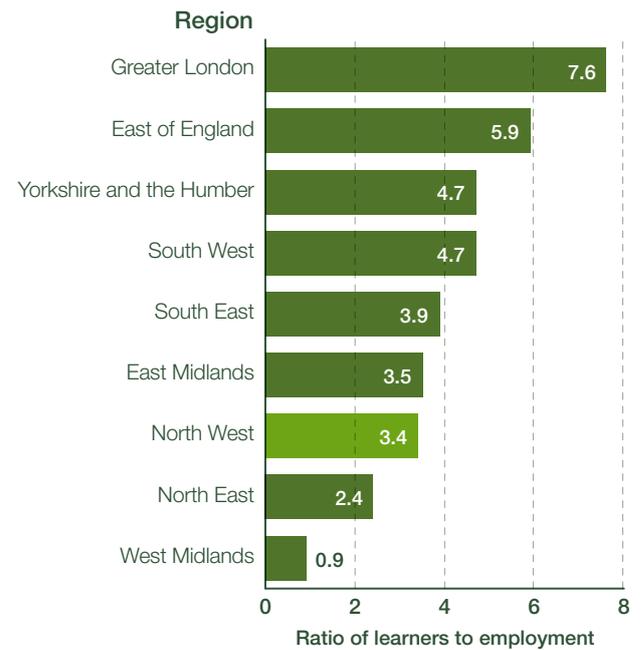
Source: Annual Survey of Hours and Earnings 2015/Office for National Statistics

Ratio of learners to employment; FE and private, Apprentices and HE - North West compared with national average



Source: SFA/HEFCE/Semta

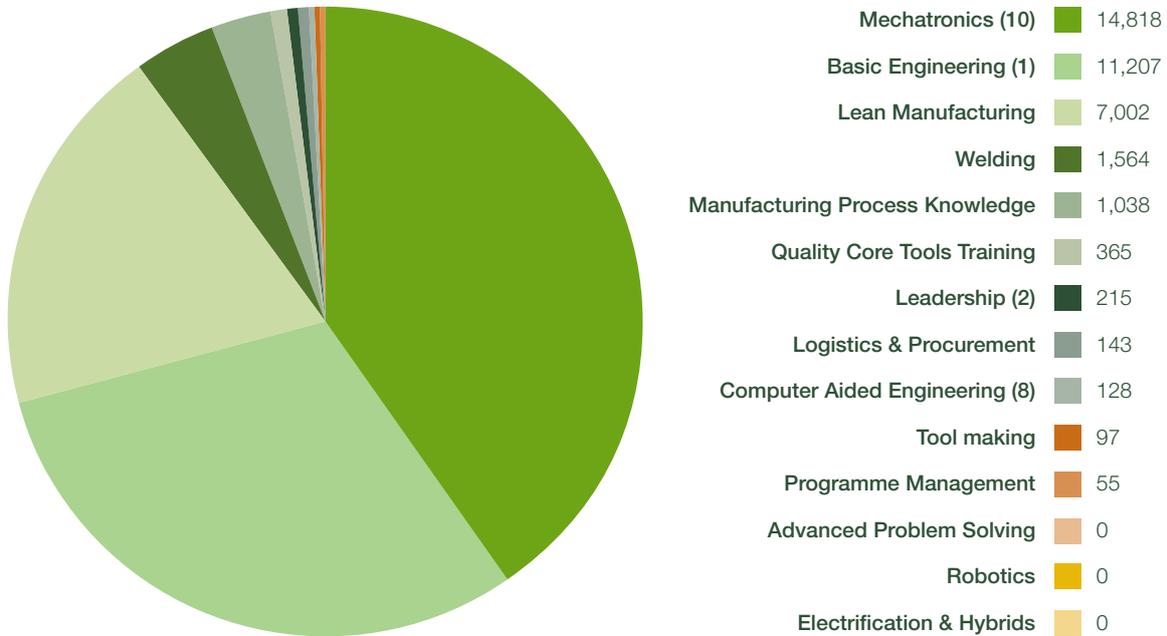
Ratio of learners to automotive employment by Region



Source: SFA/HEFCE/Semta

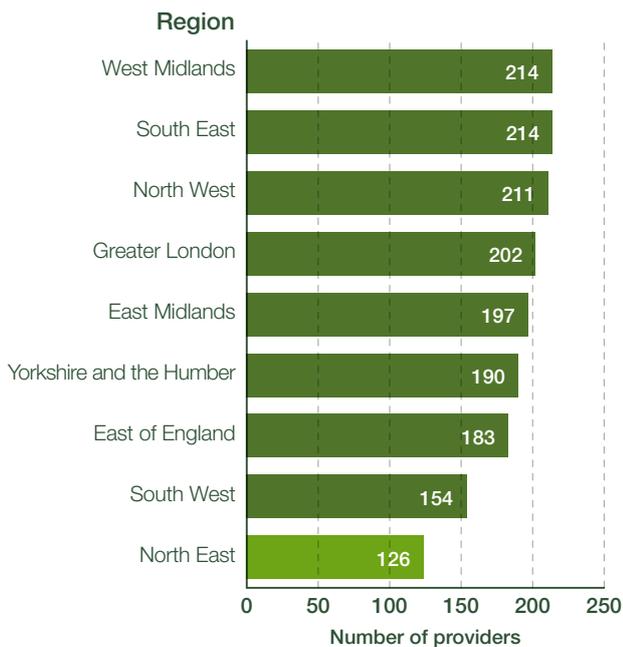
North East

Volume of learning provision in the North East of relevance to key skill shortage areas



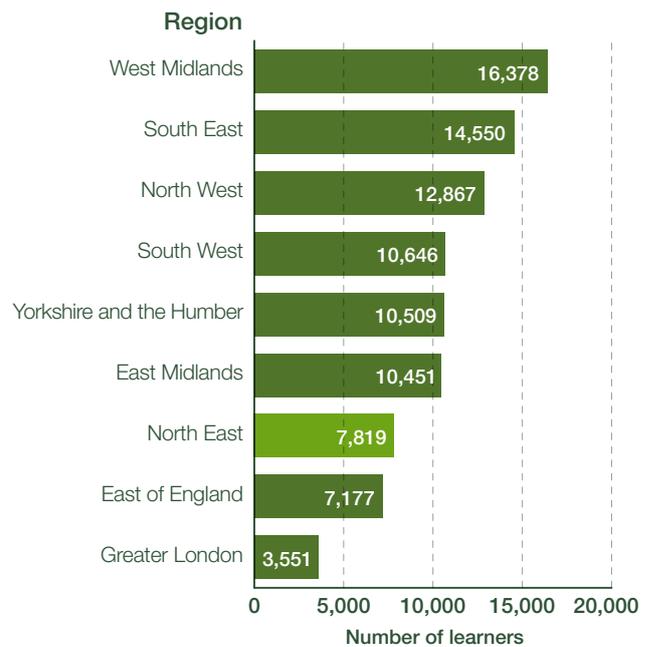
Source: Skills Funding Agency/Semta; The above analysis is based on the number of 'learning aims' being undertaken rather than number of learners – The figures in brackets relate to the rank of importance of each future/ongoing skill shortage area nationally as identified by employers.

Total number of providers relevant to the automotive sector



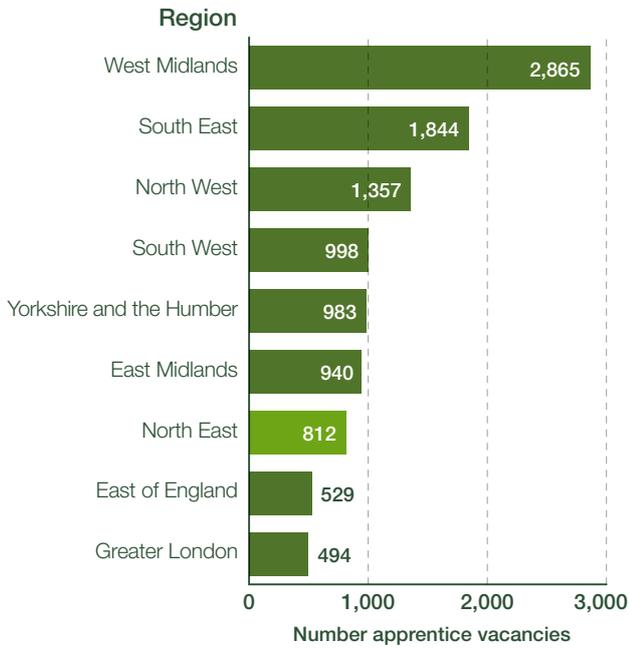
Source: SFA

Number of apprentices relevant to Manufacturing, Engineering & Quality job families



Source: SFA

Number of apprenticeship vacancies



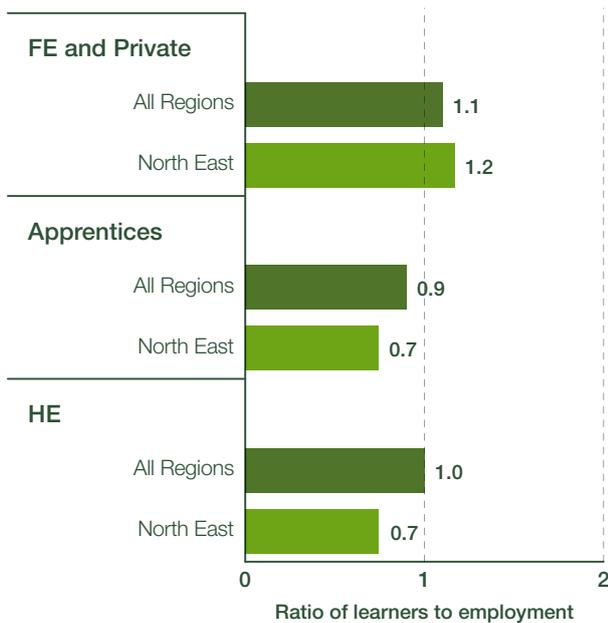
Source: NAS

Estimated annual Apprenticeship Levy payments (£ million) by automotive sector



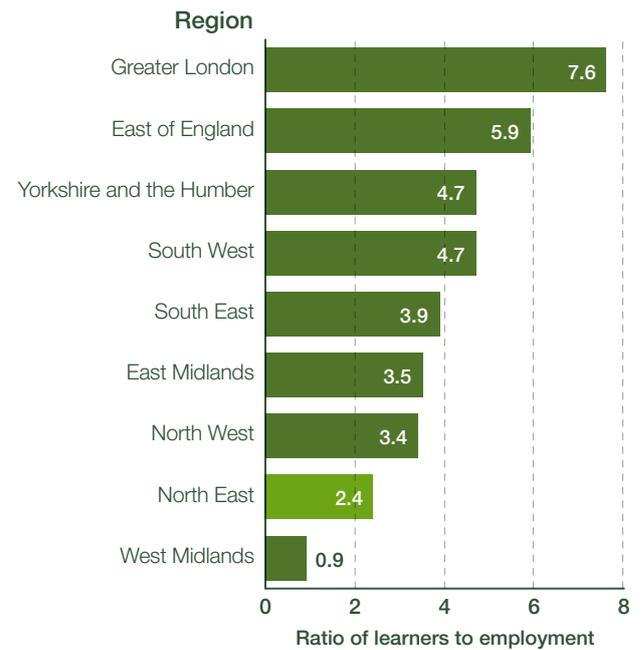
Source: Annual Survey of Hours and Earnings 2015/Office for National Statistics

Ratio of learners to employment; FE and private, Apprentices and HE - North East compared with national average



Source: SFA/HEFCE/Semta

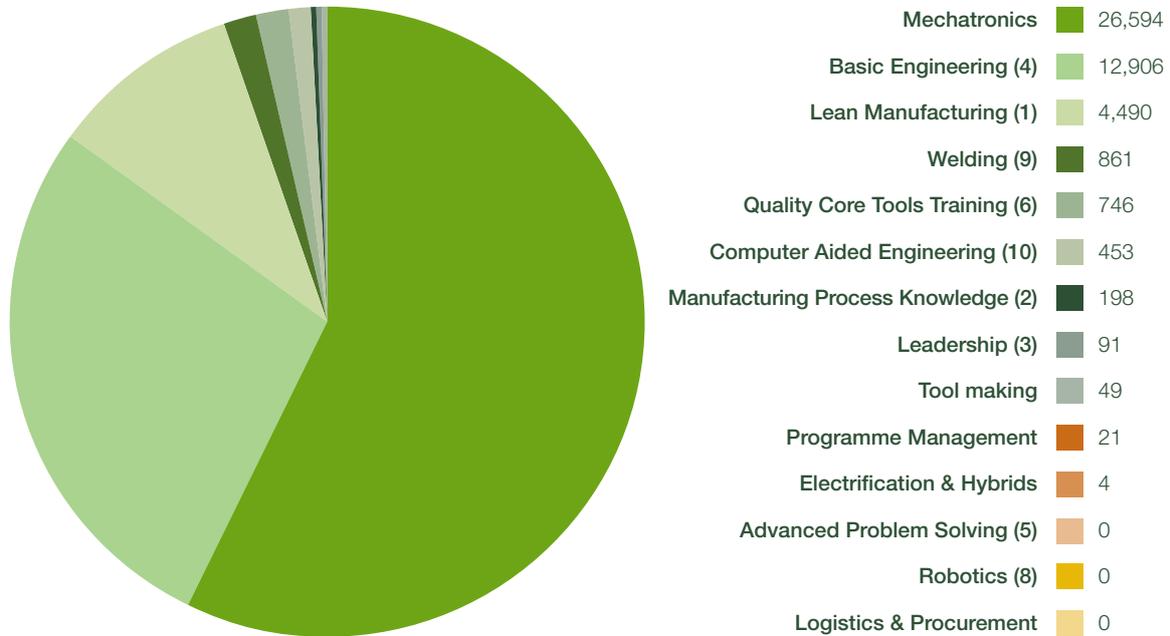
Ratio of learners to automotive employment by Region



Source: SFA/HEFCE/Semta

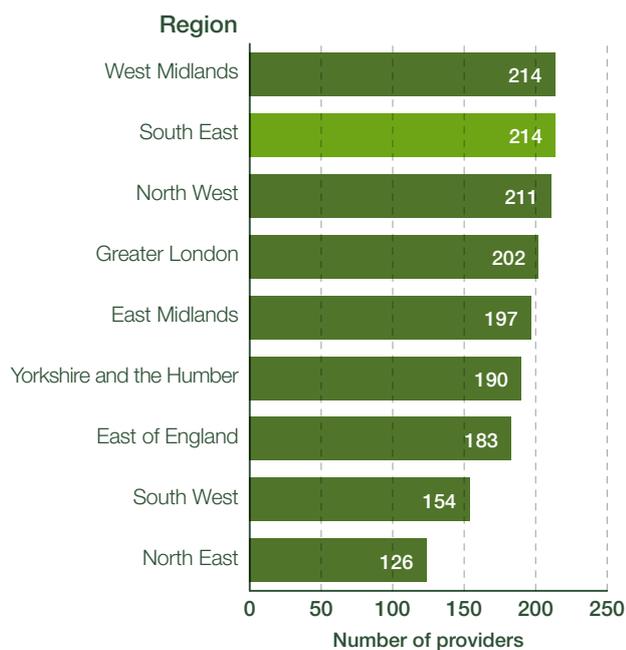
South East

Volume of learning provision in the South East of relevance to key skill shortage areas



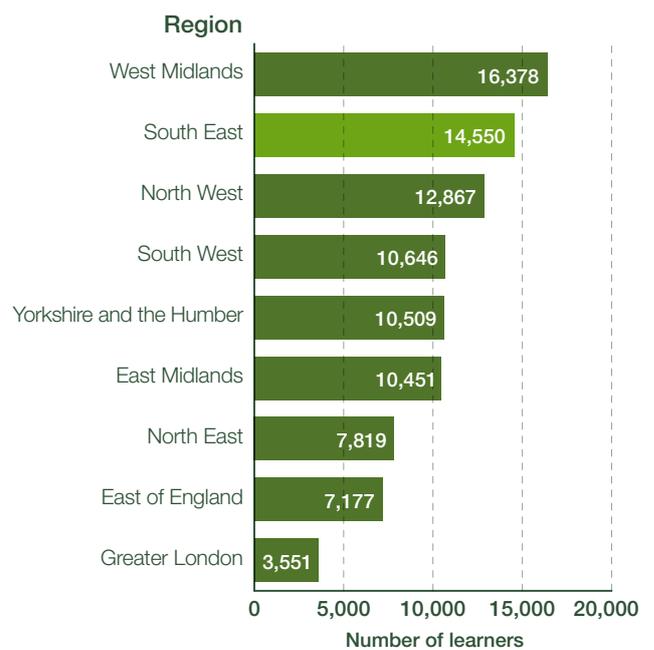
Source: Skills Funding Agency/Semta; The above analysis is based on the number of 'learning aims' being undertaken rather than number of learners – The figures in brackets relate to the rank of importance of each future/ongoing skill shortage area nationally as identified by employers.

Total number of providers relevant to the automotive sector



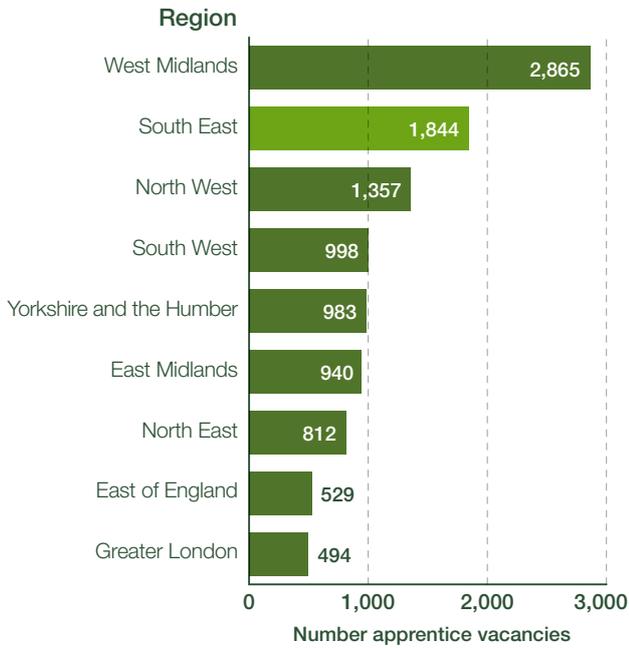
Source: SFA

Number of apprentices relevant to Manufacturing, Engineering & Quality job families



Source: SFA

Number of apprenticeship vacancies



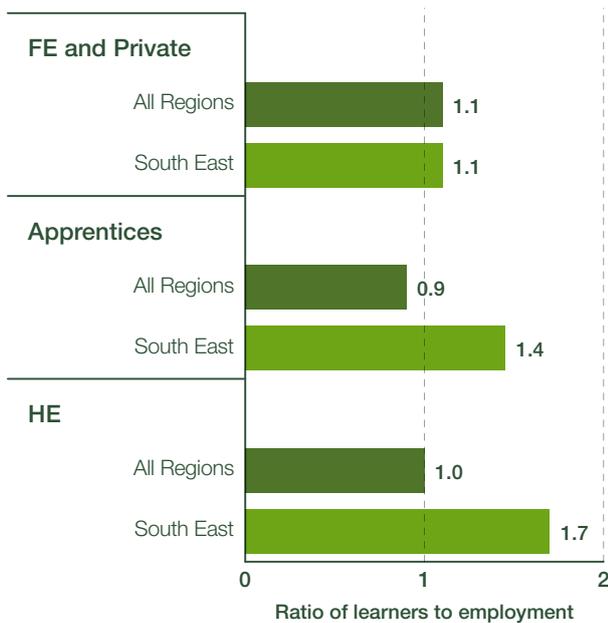
Source: NAS

Estimated annual Apprenticeship Levy payments (£ million) by automotive sector



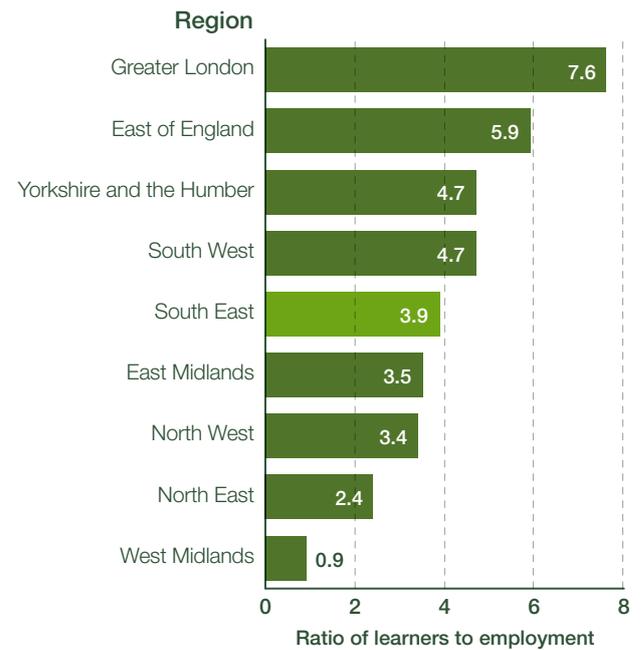
Source: Annual Survey of Hours and Earnings 2015/Office for National Statistics

Ratio of learners to employment; FE and private, Apprentices and HE - South East compared with national average



Source: SFA/HEFCE/Semta

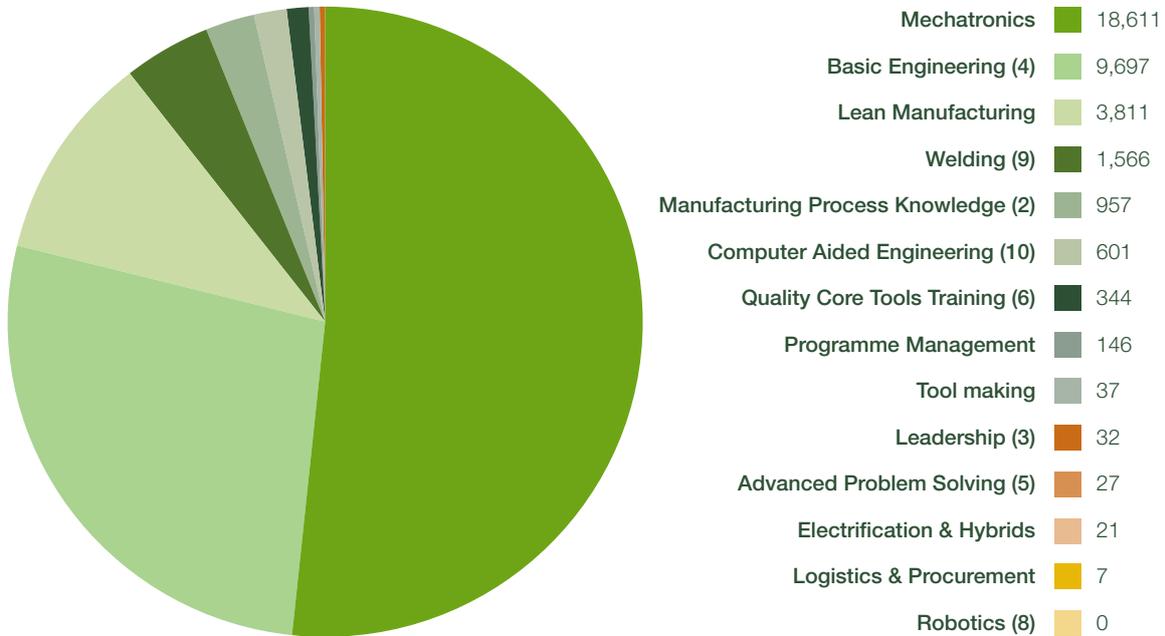
Ratio of learners to automotive employment by Region



Source: SFA/HEFCE/Semta

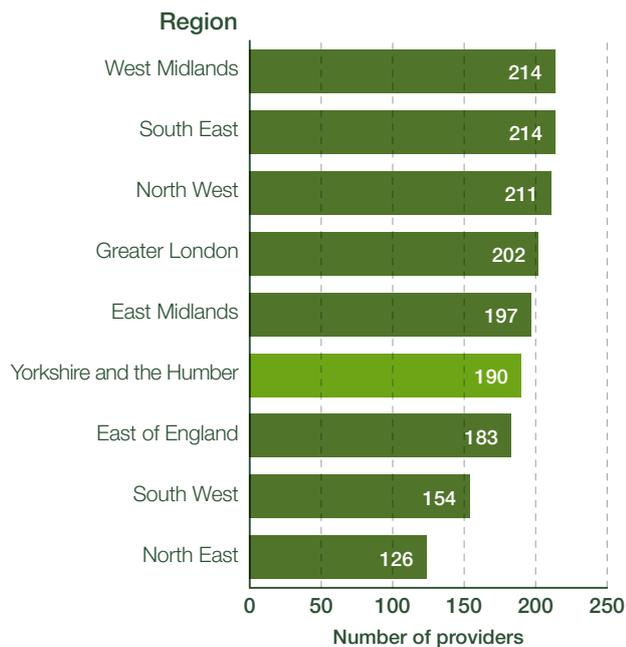
Yorkshire and the Humber

Volume of learning provision in the Yorkshire and the Humber of relevance to key skill shortage areas



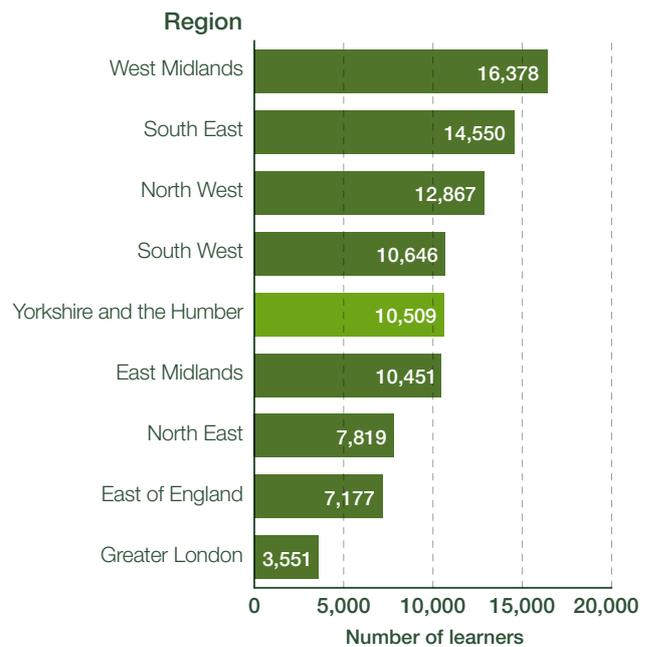
Source: Skills Funding Agency/Semta; The above analysis is based on the number of 'learning aims' being undertaken rather than number of learners – The figures in brackets relate to the rank of importance of each future/ongoing skill shortage area nationally as identified by employers.

Total number of providers relevant to the automotive sector



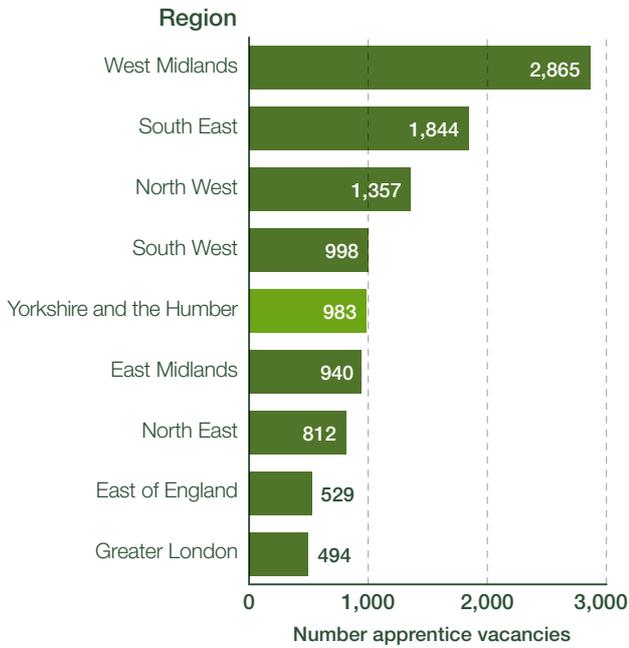
Source: SFA

Number of apprentices relevant to Manufacturing, Engineering & Quality job families



Source: SFA

Number of apprenticeship vacancies



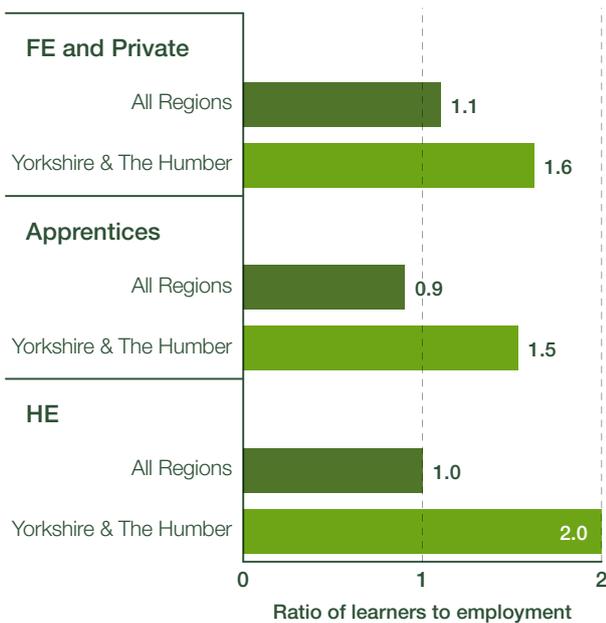
Source: NAS

Estimated annual Apprenticeship Levy payments (£ million) by automotive sector



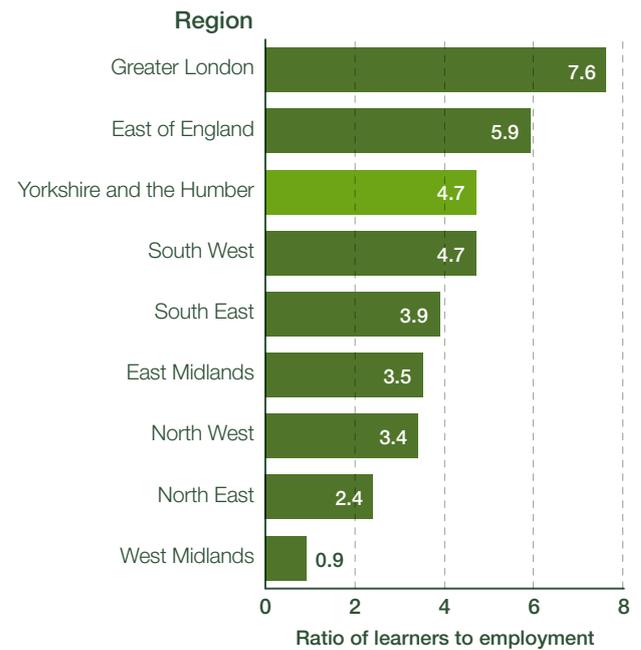
Source: Annual Survey of Hours and Earnings 2015/Office for National Statistics

Ratio of learners to employment; FE and private, Apprentices and HE - Yorkshire and the Humber compared with national average



Source: SFA/HEFCE/Semta

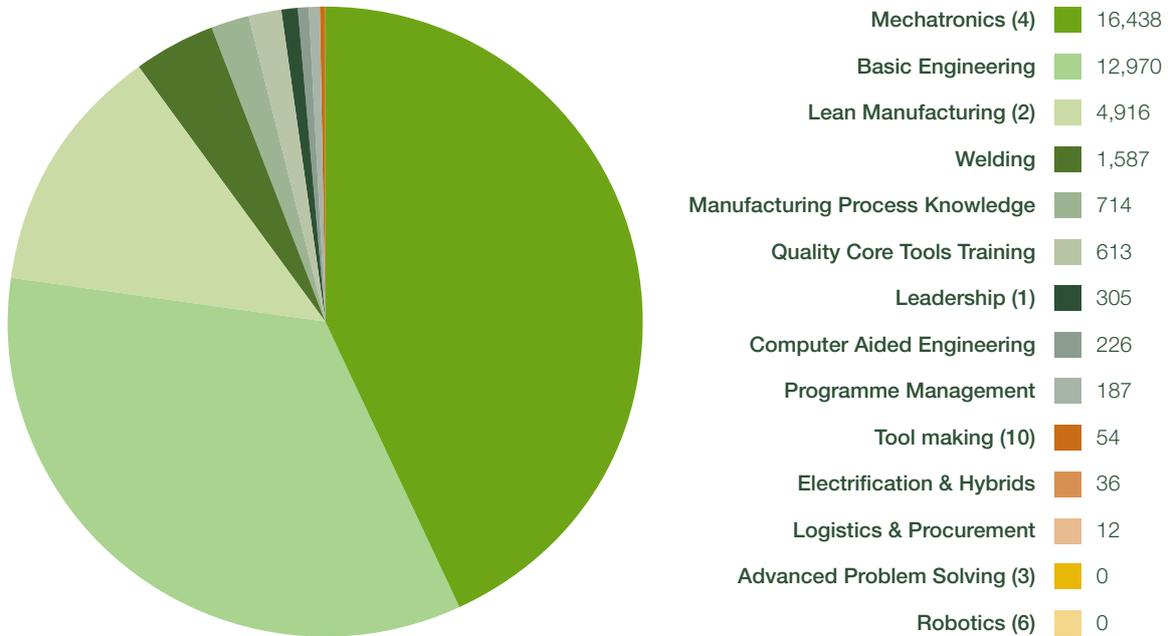
Ratio of learners to automotive employment by Region



Source: SFA/HEFCE/Semta

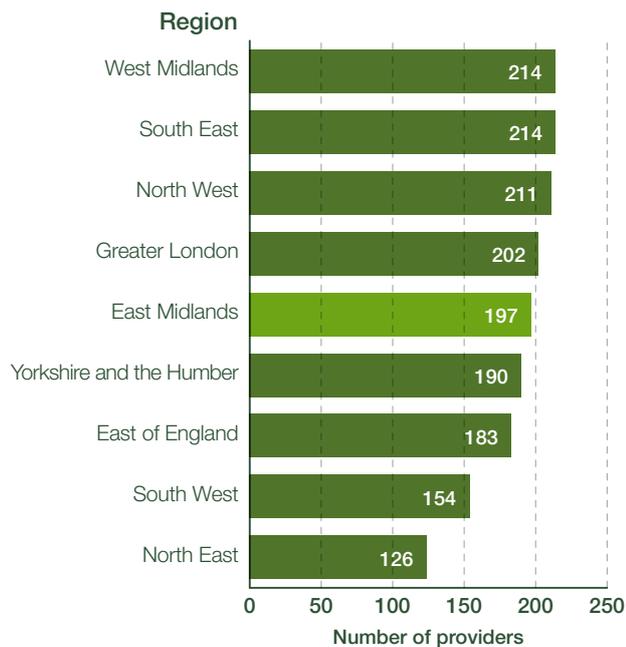
East Midlands

Volume of learning provision in the East Midlands of relevance to key skill shortage areas



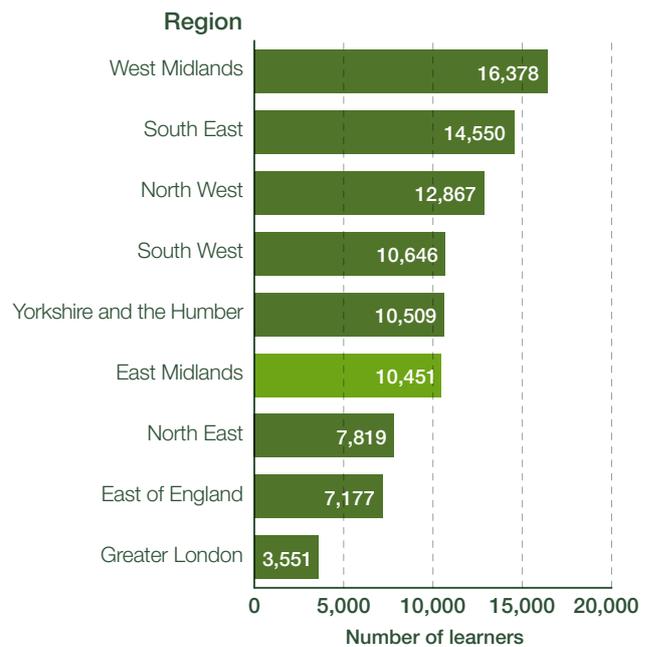
Source: Skills Funding Agency/Semta; The above analysis is based on the number of 'learning aims' being undertaken rather than number of learners – The figures in brackets relate to the rank of importance of each future/ongoing skill shortage area nationally as identified by employers.

Total number of providers relevant to the automotive sector



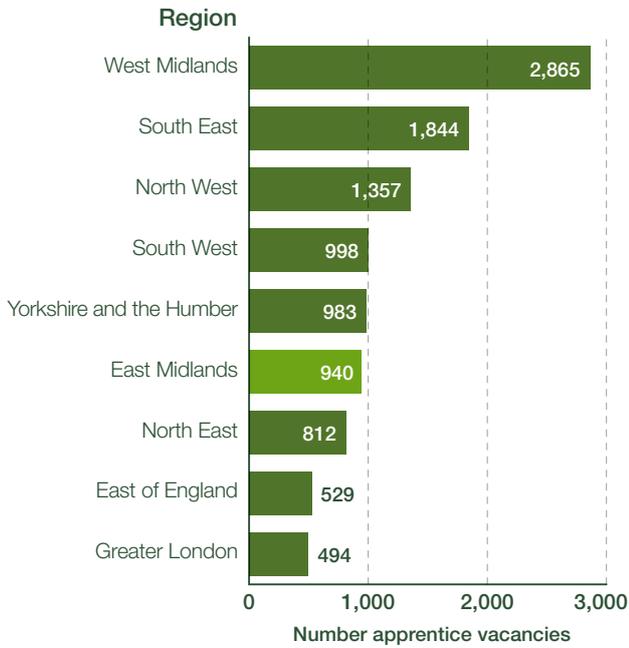
Source: SFA

Number of apprentices relevant to Manufacturing, Engineering & Quality job families



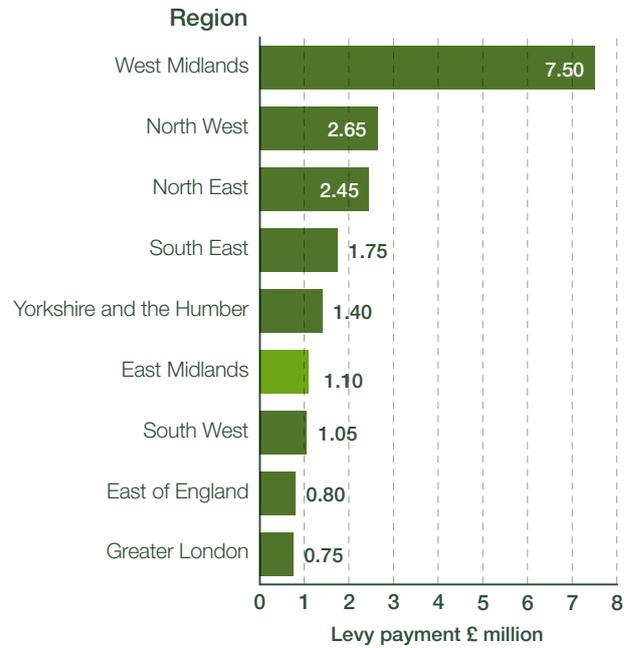
Source: SFA

Number of apprenticeship vacancies



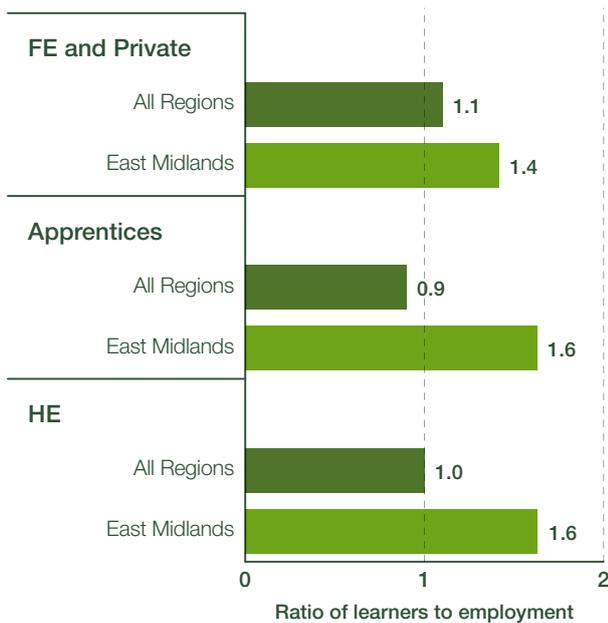
Source: NAS

Estimated annual Apprenticeship Levy payments (£ million) by automotive sector



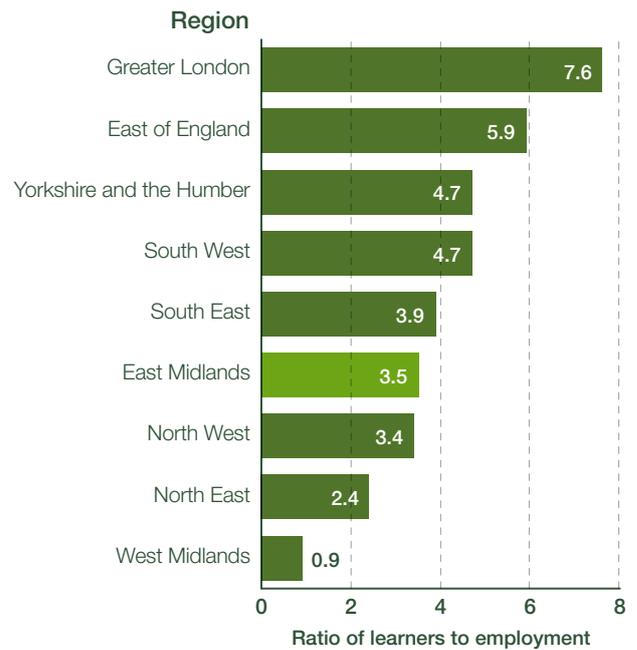
Source: Annual Survey of Hours and Earnings 2015/Office for National Statistics

Ratio of learners to employment; FE and private, Apprentices and HE - East Midlands compared with national average



Source: SFA/HEFCE/Semta

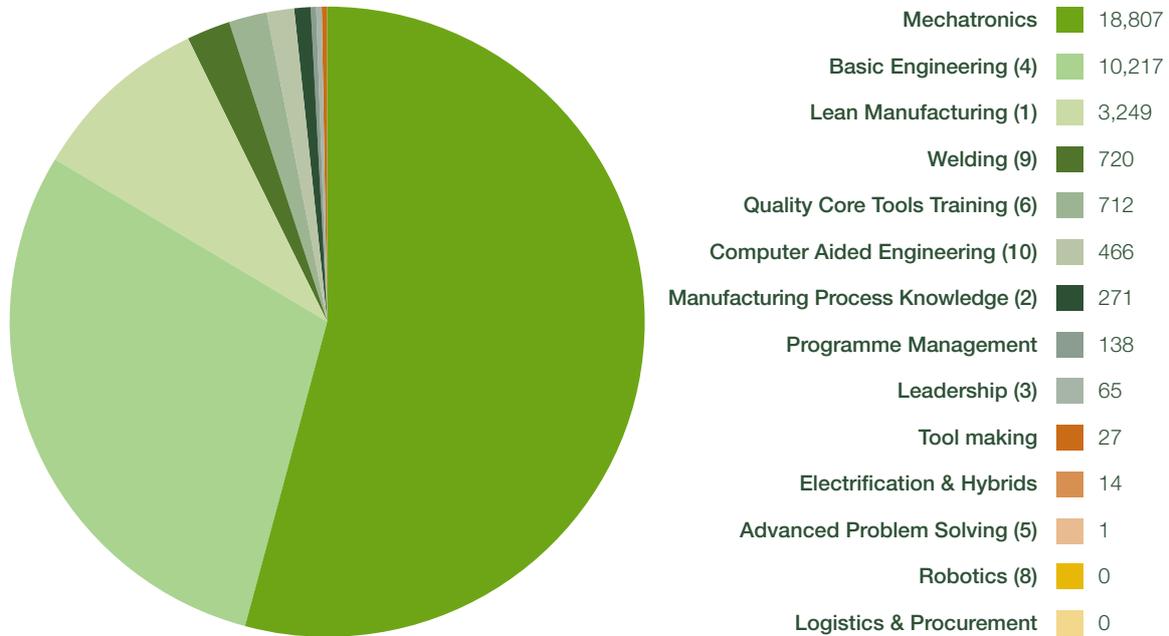
Ratio of learners to automotive employment by Region



Source: SFA/HEFCE/Semta

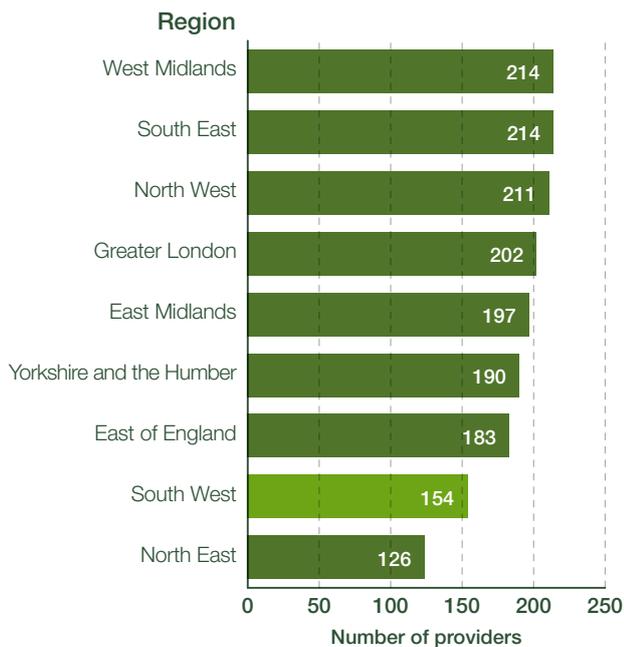
South West

Volume of learning provision in the South West of relevance to key skill shortage areas



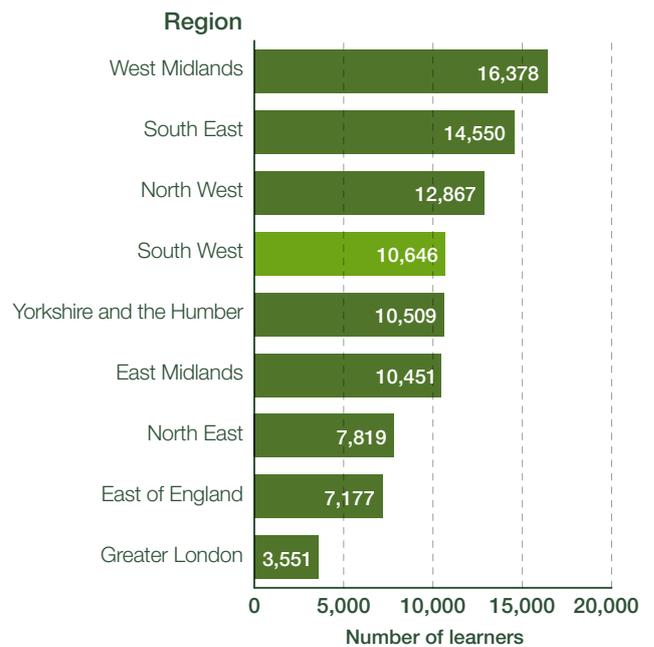
Source: Skills Funding Agency/Semta; The above analysis is based on the number of 'learning aims' being undertaken rather than number of learners – The figures in brackets relate to the rank of importance of each future/ongoing skill shortage area nationally as identified by employers.

Total number of providers relevant to the automotive sector



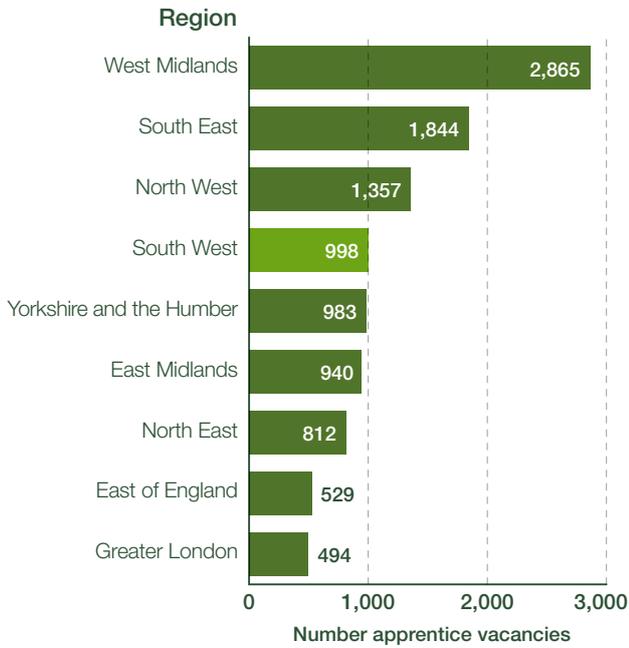
Source: SFA

Number of apprentices relevant to Manufacturing, Engineering & Quality job families



Source: SFA

Number of apprenticeship vacancies



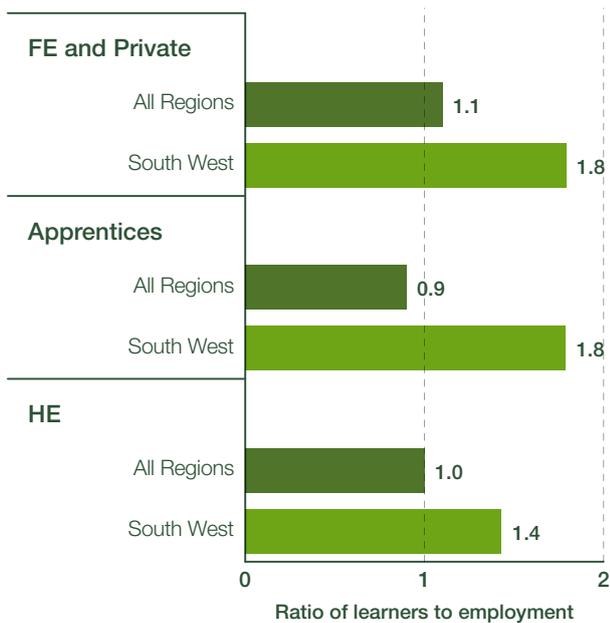
Source: NAS

Estimated annual Apprenticeship Levy payments (£ million) by automotive sector



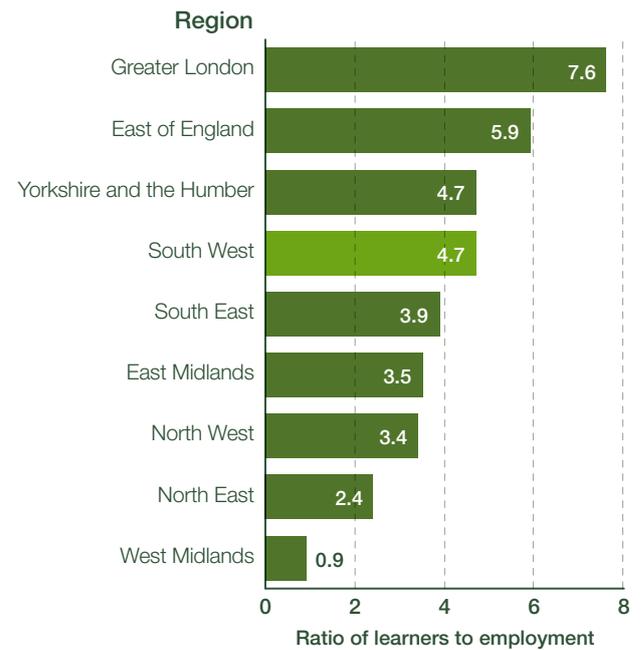
Source: Annual Survey of Hours and Earnings 2015/Office for National Statistics

Ratio of learners to employment; FE and private, Apprentices and HE - South West compared with national average



Source: SFA/HEFCE/Semta

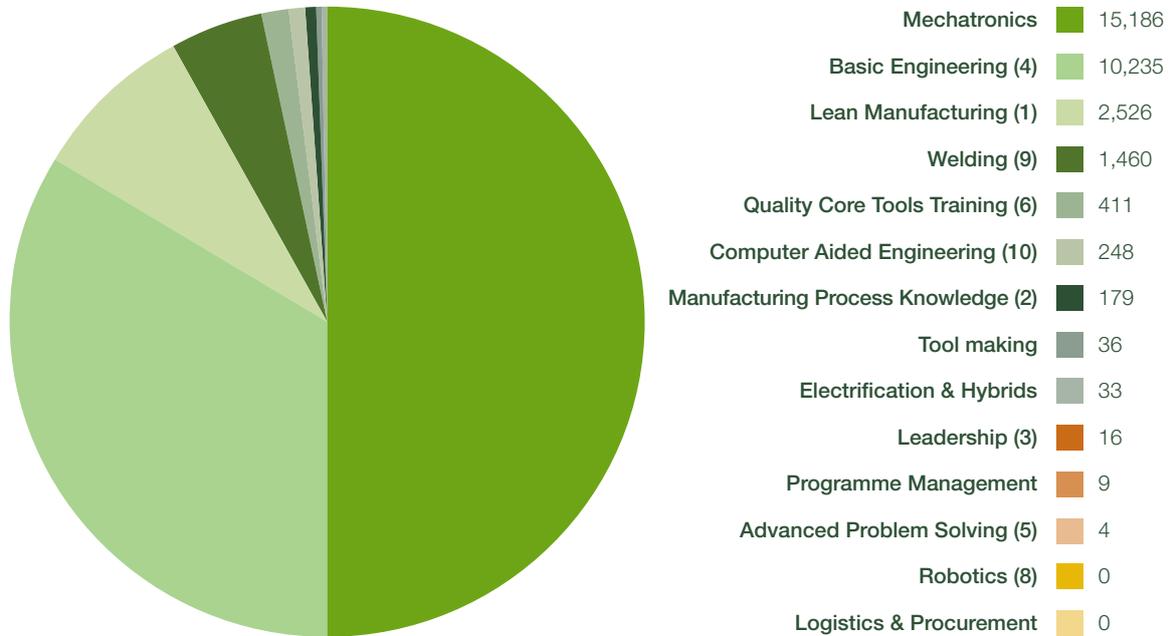
Ratio of learners to automotive employment by Region



Source: SFA/HEFCE/Semta

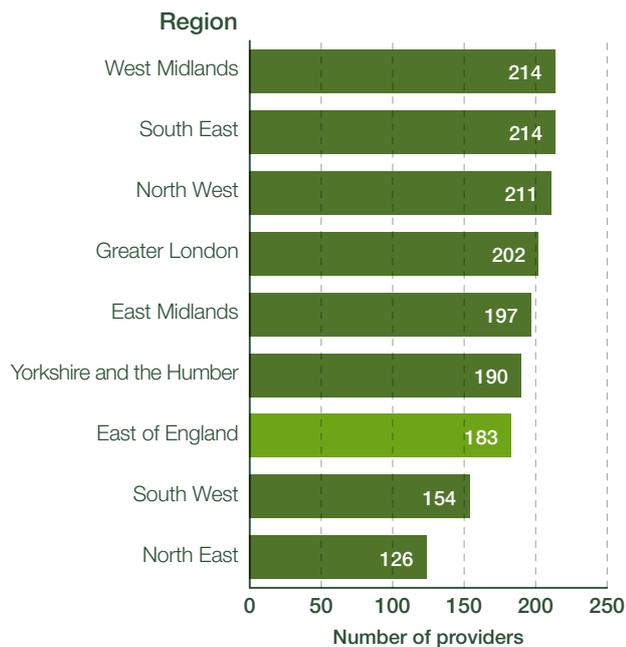
East of England

Volume of learning provision in the East of England of relevance to key skill shortage areas



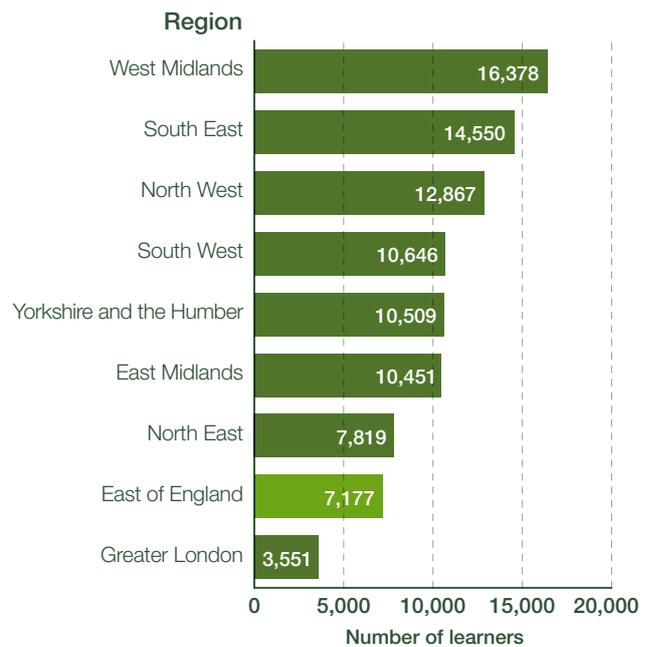
Source: Skills Funding Agency/Semta; The above analysis is based on the number of 'learning aims' being undertaken rather than number of learners – The figures in brackets relate to the rank of importance of each future/ongoing skill shortage area nationally as identified by employers.

Total number of providers relevant to the automotive sector



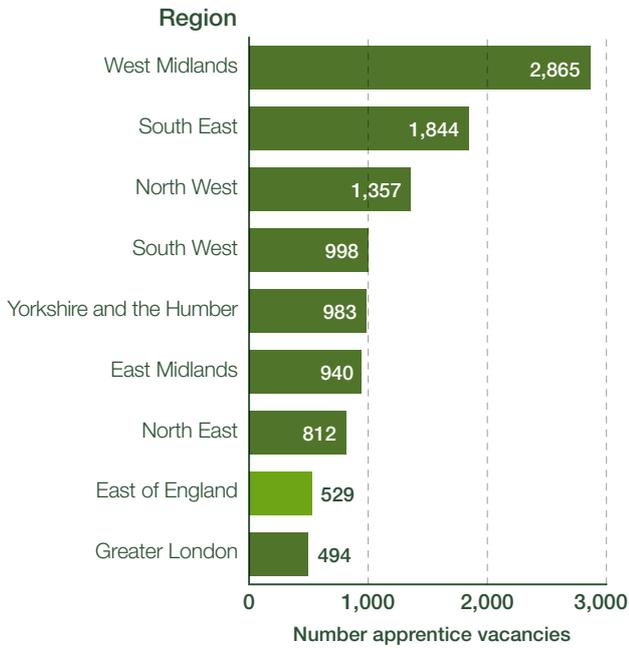
Source: SFA

Number of apprentices relevant to Manufacturing, Engineering & Quality job families



Source: SFA

Number of apprenticeship vacancies



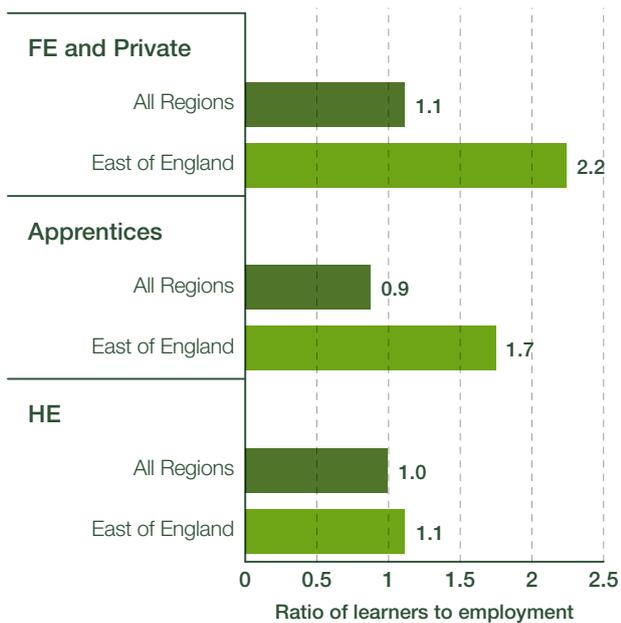
Source: NAS

Estimated annual Apprenticeship Levy payments (£ million) by automotive sector



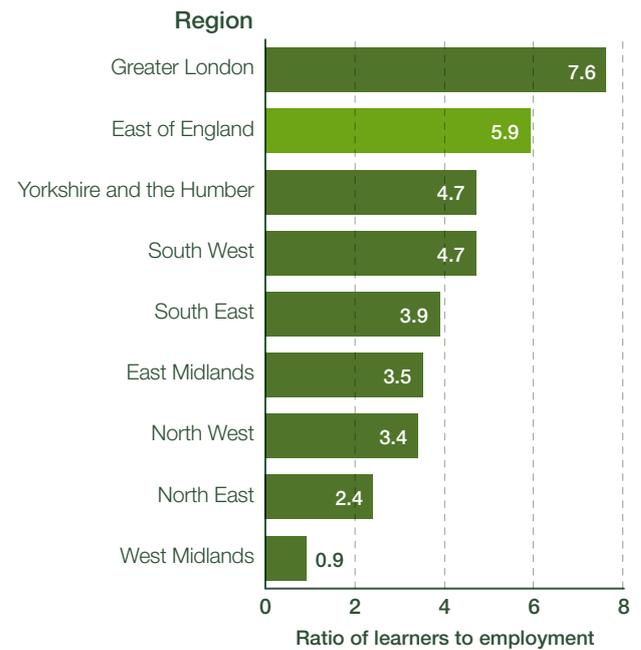
Source: Annual Survey of Hours and Earnings 2015/Office for National Statistics

Ratio of learners to employment; FE and private, Apprentices and HE - East of England compared with national average



Source: SFA/HEFCE/Semta

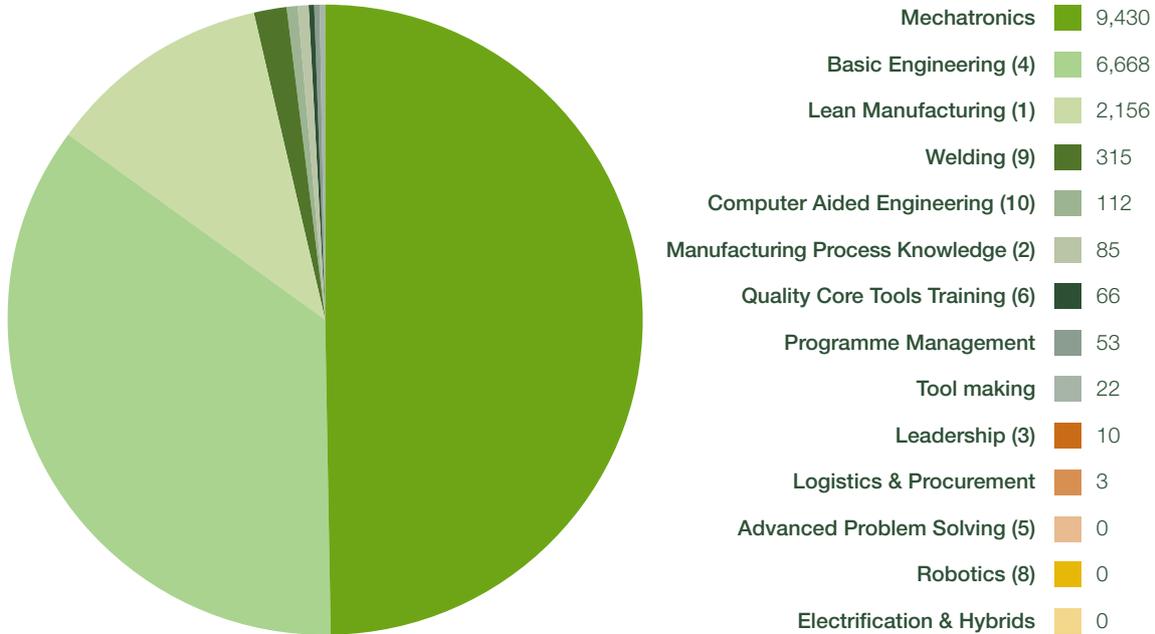
Ratio of learners to automotive employment by Region



Source: SFA/HEFCE/Semta

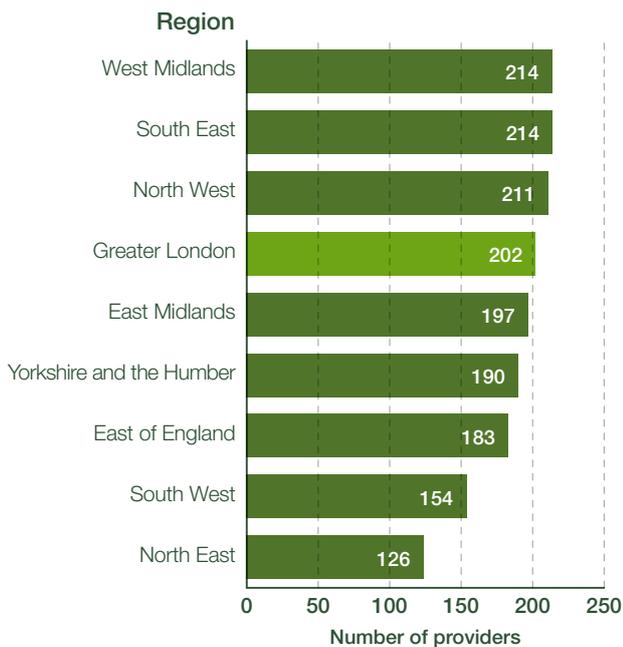
Greater London

Volume of learning provision in the Greater London of relevance to key skill shortage areas



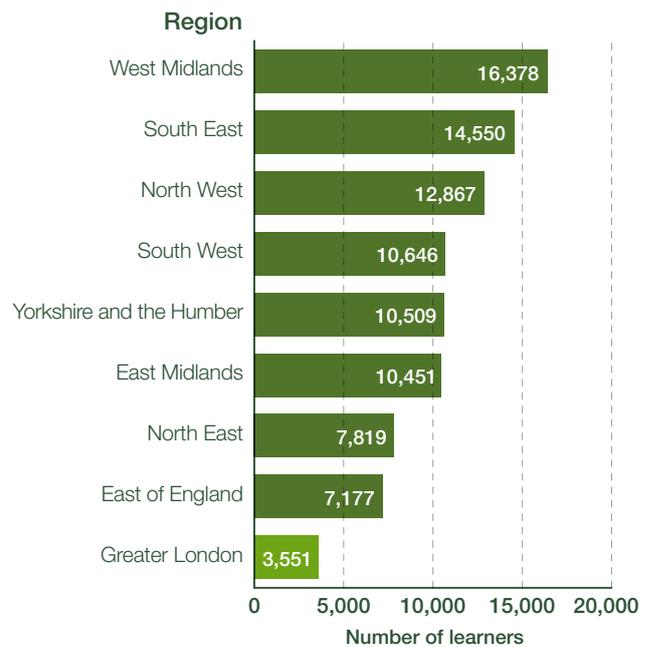
Source: Skills Funding Agency/Semta; The above analysis is based on the number of 'learning aims' being undertaken rather than number of learners – The figures in brackets relate to the rank of importance of each future/ongoing skill shortage area nationally as identified by employers.

Total number of providers relevant to the automotive sector



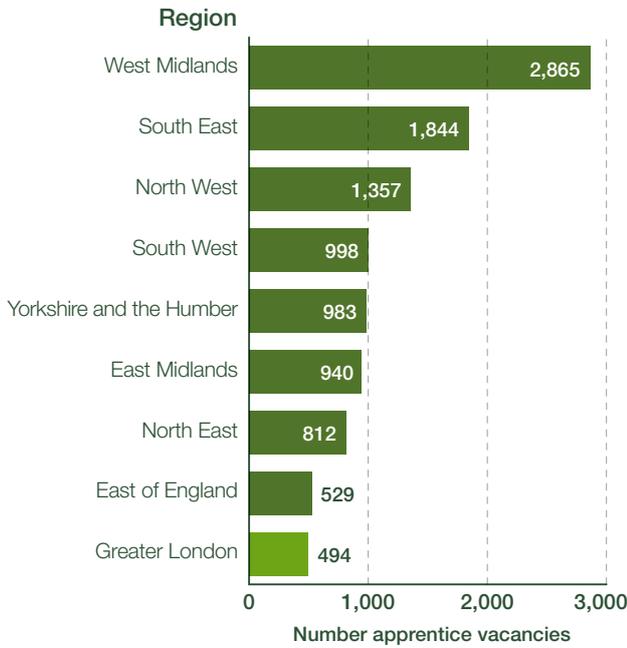
Source: SFA

Number of apprentices relevant to Manufacturing, Engineering & Quality job families



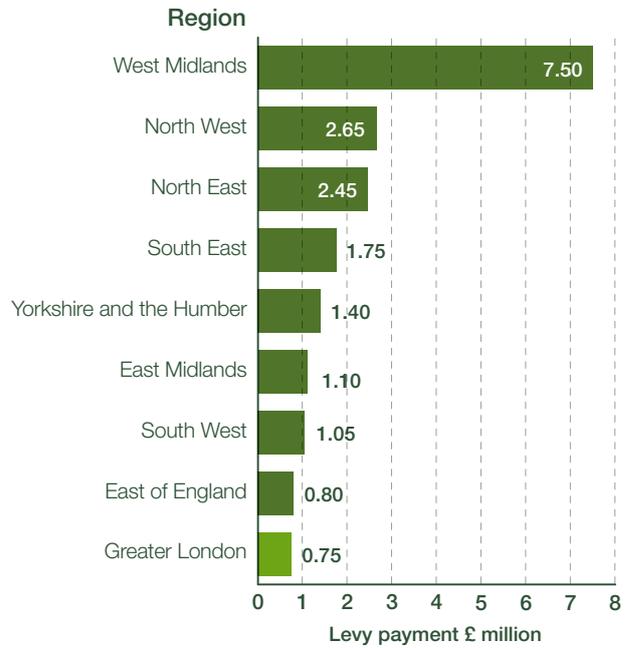
Source: SFA

Number of apprenticeship vacancies



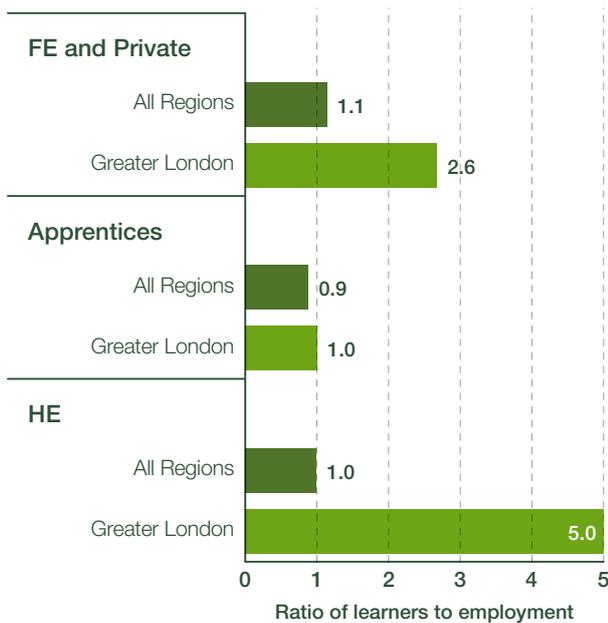
Source: NAS

Estimated annual Apprenticeship Levy payments (£ million) by automotive sector



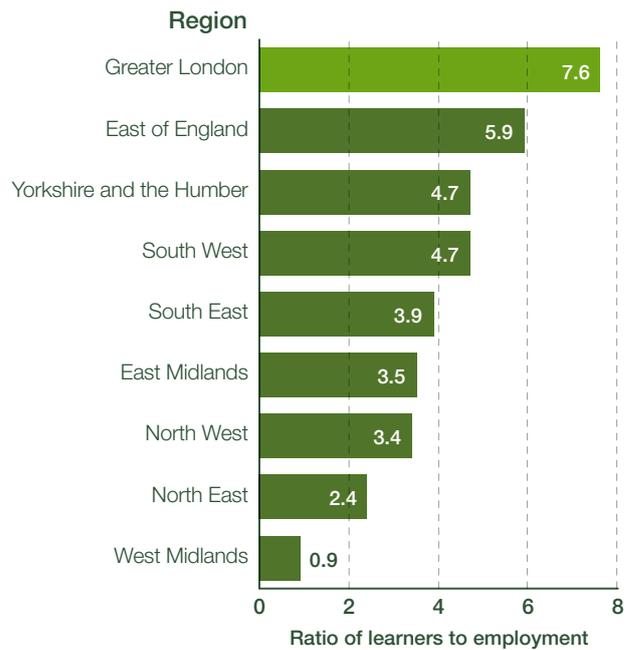
Source: Annual Survey of Hours and Earnings 2015/Office for National Statistics

Ratio of learners to employment; FE and private, Apprentices and HE - Greater London compared with national average



Source: SFA/HEFCE/Semta

Ratio of learners to automotive employment by Region



Source: SFA/HEFCE/Semta







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