BRIEFING: AN ANALYSIS OF SECTORAL EMPLOYMENT AND SKILLS ISSUES AND THEIR IMPLICATIONS FOR PUBLICLY FUNDED TRAINING PROVISION IN THE EAST OF ENGLAND

July 2010

An analysis of sectoral employment and skills issues and the implications for publicly funded training provision

This analysis presents a broad overview of sectoral employment and skills trends in the East of England. It attempts to put Skills Funding Agency data on Apprenticeships and Train to Gain in context by linking this to more general sector based labour market information including results from EEDA's East of England Forecasting Model (EEFM). The sectors presented have been constructed to match the EEFM sectors with the Sector Skills Council (SSC) and Standard Setting Bodies (SSBs) footprints. This is not an exact science and the results of the exercise are presented in Annex 1. The SSCs themselves do not cover the entire labour market and much of the Apprenticeship and Train To Gain delivery is focused on occupational or generic skills with no specific reference to a sector (usually through SSBs). The sectors included in this analysis are set out below.

1. Agriculture
2. Energy, Water Supply & Fuels
3. Manufacturing
4. Construction
5. Retail
6. Automotive Retail
7. Hotels & Restaurants
8. Transport & Logistics
9. Financial Services
10. Business Services
11. Public Administration
12. Education
13. Health & Social Care
14. Other Services (including personal, community, creative & cultural)

Annex 2 sets out some charts which highlight the industrial structure of employment in the East of England and a forecast of employment change over the next five years. These have been taken from Skills Insight.

The following analysis is intended to be strategic. It does not attempt to make micro-level recommendations about specific training investment decisions. Instead, the analysis provides a context that can be used to:

a) make decisions about the overall patterns of training investment
b) support local intelligence in making more specific local investment decisions

Agriculture

Employment trends & prospects	Skills issues	Sub-regional focus

• Agricultural employment has been in long term decline. However, it remains a significant employer in many rural economies – though employment will continue to decline
• Agriculture in the East of England is dominated by arable farming. The East accounts for a quarter of all arable employment in England
• Production horticulture is another important specialism in the region
• The sector is characterised by high levels of self employment, unpaid family workers and workers aged over 50
• Migrant workers are an important part of the seasonal workforce but numbers are declining
	• The majority of employment is within manual roles – both skilled and unskilled. These roles will see falling employment
	  o Continued need for skilled machinery operators and mechanics
	• Managerial and professional roles will be stable despite the backdrop of employment decline
	  o Increasing need for IT, programme production, environmental management
	  o Management skills such as marketing, sales and finance important for SME managers
	• An ageing workforce will increase replacement demand due to high levels of retirement – particularly for key decision makers
	• Literacy & numeracy still important in a sector where 25% of workforce have no qualifications
		• Agricultural employment is important in most rural communities. However, the nature of agricultural employment does vary spatially with some local areas specialising in specific parts of the sector
		Sector definition & caveats
		• Agriculture has been defined as SIC 0-5 – agriculture, forestry, hunting & fishing
		• Lantra covers many land based industries beyond the scope of agriculture. Some of these will be picked up in other sector analyses

Sources	LSC/ SFA funded training provision for East of England	Policy & funding implications
• *Research factsheet for the East of England – Environmental and land-based industries*, Lantra (October 2009) • *Research factsheet for production horticulture*, Lantra (October 2009) • *Research factsheet for agricultural crops*, Lantra (October 2009) • *Research factsheet for agricultural livestock*, Lantra (October 2009) • *Skills assessment for the environmental and land based sector – England*, Lantra (July 2009)	• Relevant SSCs/SSBs include: Lantra • Around one in ten Train to Gain starts in Agriculture, Horticulture & Animal Care for 2008/9 • One quarter of delivery for both Apprenticeships and Train to Gain at Level 3 • Very little delivery at below Level 2 or above Level 3 • Around two-thirds of Train to Gain beneficiaries aged over 30 and less than a fifth over 50 • Some Lantra provision will cover land based activities outside of the agricultural sector • Of medium importance for learners on Apprenticeships and low for Train to Gain	• The vocational nature of many agricultural roles should make the sector well suited to Apprenticeship and Train to Gain programmes • There should be scope for a more balanced provision across levels: o Entry level opportunities may increase if migrant workers continue to fall o Need to develop higher level (Level 3 and 4) technical skills o Could skilled workers be re-trained from other sectors such as engineering? • Do low levels of younger beneficiaries reflect difficulties in 'selling' the sector as a career option?

Energy, Water Supply and Fuels

<table>
<tr><th>Employment trends & prospects</th><th>Skills issues</th><th>Sub-regional focus</th></tr>
<tr>
<td rowspan="3">
Energy & water supply industries employ about 50,000 people in the region
There are smaller numbers employed in nuclear and oil & gas
The biggest employers are the water industry, waste management and downstream gas industries
Employment has been in decline for many years across the sector as a whole
Employment losses likely to continue though East may fare better than other regions if population grows faster?
Some growth likely in areas such as renewables and low carbon related activities – including nuclear?
</td>
<td rowspan="3">
Increased competition has led to greater use of contractors. Contractors are increasingly working across utilities. As a result they are looking for multi-utility and multi-trained staff
An ageing workforce will bring recruitment issues particularly for managers and senior professionals
This issue could be ameliorated by recruiting a more diverse workforce
The low carbon agenda will create new jobs with new skills. However, it will also require many more existing staff to update or broaden their skills base
Occupational and skill profiles vary considerably within the sector. For example, waste management employs a higher proportion of lesser skilled roles – mainly operatives and drivers
But skill needs are likely to rise across all sub-sectors
STEM skills identified as a key issue across many sub sectors
</td>
<td>
Some employment concentrated in large employers and geographically concentrated

Power stations
Waste management sites
Support for offshore oil & gas based in Great Yarmouth & Lowestoft
Electricity industry and upstream gas industry

</td>
</tr>
<tr><td>Sector definition & caveats</td></tr>
<tr><td>
Energy, water supply & fuels has been defined as SIC 11 (oil & gas), 23 (nuclear fuel), 40 (electricity & gas), 41 (water supply)
This brings together EU skills and non manufacturing parts of the Cogent footprints
</td></tr>
</table>

Sources	LSC/ SFA funded training provision for East of England	Policy & funding implications
• *Energy & Utility Skills – sector skills agreement England – summary*, EU Skills (undated) • *East of England SSA stage 5 report*, EU Skills (undated) • *Sector skills assessment*, Cogent (February 2010) • *East of England factsheet*, Cogent (2008) • *Low carbon cluster – sector skills assessment report*, Cogent, EU Skills & partners (December 2009) • *East of England skills for energy*, IFF Research Ltd (November 2004)	• Relevant SSCs include: EU skills; Cogent • The lowest level of Apprenticeships of any sector in the East of England • Very few Apprenticeships being delivered through either EU skills or Cogent • Most apprenticeships are at Level 3 • Train to Gain is more heavily used by the sector with the majority through EU skills and a minority through Cogent • Virtually all Train to Gain is at Level 2	• Energy, water supply and fuels employ a relatively small number of people in the region • Many subcontractors are likely to be using other SSCs/ SSBs • The low level of Apprenticeships reflects low numbers of young people entering the sector. There is a need for better careers guidance and progression routes – the lack of level 2 Apprenticeships appears to be one stumbling block • East has one of lowest levels of engineering apprenticeships across all regions • Given the high numbers working in skilled trades/ technician roles the focus on Level 2 for Train to Gain is surprising • There may be scope to ease some recruitment problems by recruiting from associated sectors such as engineering or construction • This may require higher level but more flexible training solutions

Manufacturing

Employment trends & prospects

- Manufacturing employment has been in decline for many years and this trend is forecast to continue. However, this masks a number of important issues:
  - Within the pattern of general decline there are new and emerging sub sectors that are growing their workforce
  - Employment is declining against a backdrop of (long term) output growth signifying productivity gains and increased skills needs
  - Many manufacturing jobs, and hence skills, have been outsourced to other sectors – but they still exist
- The region has a very significant presence across many of the emerging industrial technologies including: life sciences; micro/ nanotechnology; industrial biotechnology; composites and low carbon vehicles
  - East of England is second largest employer in Bioscience sector – 30,000 jobs – with strong growth forecast
- The region retains specialisms in longer standing manufacturing activities such as food & drink; plastics, computing and electronics
  - Over 30,000 jobs in printing – 15% of UK total

Skills issues

- In general, the shift from manual (skilled and unskilled) roles to professional and technical roles will continue
- Changing skills needs will be driven by new: technologies; products & services; legislation; and, working practices
- The emerging growth industries will generate many jobs requiring HE level skills. Advanced manufacturing will require increasing numbers of highly skilled technicians and technical support staff alongside greater commercial skills
- Many firms in less 'hi-tech' industries will also need to up-skill to achieve the productivity gains necessary to remain competitive
- Some sectors/ businesses will continue to operate low cost business models based on low skilled/ low paid staff ensuring steady supply of entry level jobs. However, the high levels of workers with no qualifications is unsustainable
- Manufacturing SMEs are reluctant to send staff away for training. They are looking for local, and ideally, on-the-job training
- Studying STEM subjects at school remains a key foundation for young people entering the engineering sector

Sub-regional focus

- Manufacturing has a strong tendency to develop clusters as it usually serves non local markets. For example:
  - Food & drink (Fens, Norfolk & Suffolk)
  - Pharmaceuticals (Hertfordshire)
  - Computing (Cambridge)
- Engineering employment levels vary considerably by local authority but there is no obvious spatial pattern

Sector definition & caveats

- Manufacturing has been defined as SIC D (manufacturing)
- Some specific parts of manufacturing may be covered in other sector analyses

Sources (contd)

- *Skills and the future of advanced manufacturing*, Semta and partners (December 2009)
- *UK science industries (Bioscience) Factsheet*, Semta (June 2010)
- *The sector skills assessment for the process and manufacturing sector*, Proskills England (February 2010)

Sources	LSC/ SFA funded training provision for East of England	Policy & funding implications
• *Sector skills assessment*, Cogent (Feb 2010) • *East of England polymer composites research project*, Cogent (undated) • *Strategic skills assessment for the fashion and textiles sector in England*, Skillset (February 2010) • *Sector skills agreement – food and drink manufacturing sector – the East of England executive summary*, Improve (July 2007) • *The food and drink manufacturing industry in the East of England*, Improve (August 2009) • *Skills and the future of engineering in England*, Semta (February 2010) • *Skill needs assessment for the metals, mechanical equipment and electrical equipment sectors – East of England – SSA stage 1 report*, Semta (January 2008) • *An assessment of current provision in the metals, mechanical equipment and electrical equipment sectors – East of England – SSA stage 2 report*, Semta (January 2008) • *Life sciences & pharmaceuticals: a future skills review with recommendations to sustain growth in emerging technologies*, Cogent, Semta & Skills for health (December 2009) • *Source: SFR, The Data Service, ONS June 2010*	• Relevant SSCs/SSBs include: SEMTA; Improve; Proskills; Cogent; Skillfast-UK • Nationally there were 114,800 Apprenticeship starts in Engineering & Manufacturing Technologies, in last three 3 years. • A sector of note for the high number of learners on Train to Gain but of medium importance in terms of Apprenticeships • SEMTA is the key player in this sector. It was responsible for 6 out of every 10 Train to Gain starts. The great majority of Apprenticeship starts suggest non SEMTA parts of manufacturing are not providing Apprenticeship opportunities. • The proportion of starts in food & drink (especially Train to Gain) is low in comparison to its employment share. This possibly reflects low value added business models in the sector or a preference for in-house training programmes? • Proskills accounts for around one in ten of manufacturing Train to Gain starts but this figure halves when considering Apprenticeship starts, suggesting it is not attracting younger workers	• More businesses need to be encouraged to adopt high value added/ high skill business models. There is relatively little demand at Level 3 • It is impossible to identify new and emerging sectors from the training data. Is provision keeping up with changing industrial structures? • There is a need to increase Apprenticeships in parts of the manufacturing sector • This may need to be linked to IAG related initiatives to promote manufacturing as a career option to young people • Food & drink sector more focused on competencies than qualifications. Providers must be able to demonstrate that their courses deliver real business benefits • Employers in some manufacturing sectors value experience in young entrants but many are reluctant to offer work base placements

Construction

Employment trends & prospects	Skills issues	Sub-regional focus
• Almost 30,000 jobs shed between 2007-10 • Recovery will be circumspect with pre-recession employment levels not regained until 2019 – despite East of England being forecast to have the strongest output growth in the UK over the next five years o Output growth will be driven by port and road schemes • Redundancy levels currently running above most other sectors. Jobcentre Plus notified vacancies have fallen across most skilled and unskilled trades. o Plumbers and HVAC trades are the exception. But this may simply be recovering some particularly heavy losses during the recession o Some growth in managerial and professional roles • Employment growth will be curtailed by relatively weak growth in 'Repair & Maintenance' sector – the most labour intensive part of construction and largest part of the sector within the East of England • Many skills shortages traditionally addressed through migrant labour	• Modern Methods of Construction and other productivity drivers likely to impact on skill needs • However, some lower skilled operative and labourer roles still forecast to grow • Declines in some specialist trades such as roofers, floorers and electricians • Increasing demand for 'green' skills but nature of this is still unclear. However, likely that renewables and environmental technologies will generate significant work for building services engineering trades • Growth in non-construction operatives will stimulate need for generic skills • Relatively strong growth for some professions and technical roles such as civil engineer and surveyors • Highest annual recruitment requirements for painters & decorators and plumbing & HVAC trades • Apprenticeships disproportionately impacted by recession with some firms operating a 'last in - first out' approach	o Much construction activity is small scale or repair & maintenance focused. As such employment tends to be proportional to local populations o Employment is more concentrated around major developments such as ports, hospitals or road schemes. These will often rely on a migratory workforce to cope with major peaks in demand **Sector definition & caveats** • Construction has been defined as SIC F (construction) and 74.2 (architectural and engineering activities) • Engineering construction spans many sectors but is clearly strongly linked to the construction sector • Asset Skills covers some built environment related occupations but fits better under Business Services

Sources	LSC/ SFA funded training provision	Policy & funding implications
• *ConstructionSkills Network 2010-2014 – East of England*, ConstructionSkills (2010) • *Sector skills assessment for the construction sector 2009 – UK report*, ConstructionSkills (2009) • *Skills priorities and challenges for the building services engineering sector*, Summit Skills (November 2009) • *The engineering construction industry – strategic skills cluster report*, BIS/ UKCES (December 2009)	• Relevant SSCs/SSBs include: Construction Skills; ECITB; Summit Skills; Asset Skills • The sector had the highest number of Apprenticeship starts in the East of England • Much of the Train to Gain provision is supporting workforce aged 30+ • Construction Skills delivering more Train to Gain than Apprenticeships (3:1). Most training is at Level 2. Type and level of training will be influenced by the CSCS card scheme • In contrast, Summit Skills delivering more Apprenticeships (4:1). The majority of these are at Level 3. The profile of learners is noticeably younger than Construction Skills • Very little training being delivered through ECITB • It is assumed that most Asset Skills training does not fall under the construction footprint	• Can programmes support people to move from trades into professional/ managerial roles? Less than 150 starts in Construction at over Level 3 • Need to re-train people in declining trades into growing trades such as HVAC • Little formal training available to support ‘green’ skills. Providers need to develop and expand capacity • A higher proportion of Apprenticeship training is at Level 3 than through Train to Gain funding. Is an opportunity being missed to up-skill existing workforce?

Retail

Employment trends & prospects

- The retail sector is a major employer accounting for about 270,000 jobs in 2009 in the region
- Employment has been falling in recent years even before the recession
- Significant fall in Jobcentre Plus notified vacancies across most sales occupations
- Employment is forecast to recover as the economy emerges from recession. However rate of growth may be curtailed if recovery is export/ investment - rather than consumption – led
- Structural changes and consolidation over the past five years have resulted in the UK’s top 10 retailers employing a third of the workforce
- Larger retailers have reported that staff turnover has fallen as employees are reluctant to change job in the current weak labour market

Skills issues

- E-commerce is generating a demand for new technical skills and processes
- The occupational structure of employment is forecast to change significantly
    - Sales and customer services account for half of all jobs but will see no growth over the next five years
    - Strongest growth will be for managers
    - Growth also occurring in professional and associate professional & technical roles
- East of England retail workforce one of weakest qualified in England.
    - Only 20% of retail managers qualified to Level 4 compared to 26% in England. 30% qualified below Level 2
    - About 4 in 10 of sales and customer service staff qualified below Level 2 – the sector’s preferred entry level
- Young workforce – 3 in 10 aged under 25 – with sector providing entry level employment
- Increased focus on customer service and product knowledge to provide competitive edge

Sub-regional focus

- Retail employment is more evenly spatially distributed than in other regions due to a lack of major cities
    - Larger retail centres include Norwich and Lakeside
- However, there is a retail hierarchy with larger employers in larger centres. This has implications for training demands

Sector definition & caveats

- Retail has been defined as SIC 52
- Motor related retail has been treated separately
- Wholesale has been treated separately. (It does not fit under a SSC but has some synergies with Transport & Logistics)

Sources	**LSC/ SFA funded training provision in East of England**	**Policy & funding implications**
• *Skills priorities for the retail sector in the UK and its four nations*, Skillsmart retail (January 2010) • *Regional background brief – East of England,* Skillsmart retail (Summer 2010)	• Relevant SSC is Skillsmart Retail • For every three apprenticeships starts, there were two throughTrain to Gain • Majority of beneficiaries are young reflecting age structure of the workforce. Over one in four of Train to Gain beneficiaries aged under 30 • Most delivery at Level 2. Virtually no delivery below Level 2 and only a fifth of Apprenticeships at Level 3	• Retail is an important entry level to employment for young people. Could more Level 1/ Entry Level training be delivered through active labour market policies? • Lack of Level 3 and higher qualifications may hinder progression. • Traditional sources of 'management potential' recruits are now being lost to university. How can the development of the next generation of retail managers be supported? • Providers need to work with small retailers collectively through town centre partnerships to achieve critical mass

Automotive Retail

<table>
<tr><th>Employment trends & prospects</th><th>Skills issues</th><th>Sub-regional focus</th></tr>
<tr>
<td rowspan="3">• The automotive retail sector employs about 55,000 people in the East of England
• Employment has been falling steadily over the last few years
• However, small growth is forecast over next few years
• Skilled trades account for about a third of total employment but are forecast to decline. They will account for less than 1 in 10 of total recruitment needs
• Strongest employment growth will be for managers and sales staff. These roles will account for half of total recruitment needs</td>
<td rowspan="3">• Vehicle manufacturers have a key influence on skill needs through their introduction of new technologies
• Government pressure for low carbon vehicles is also increasing demand for technical skills even though the numbers of skilled trades people will decline
• High level problem solving skills will also be in demand
• Basic and employability skills will continue to be needed with almost 3 in 10 qualified to Level 1 or below
• Management & leadership skills needed to steer businesses through difficult economic climate
• Range of generic skills – customer focus, communications, problem solving – needed across all staff</td>
<td>• Employment distribution reflects population distribution</td>
</tr>
<tr><td>Sector definition & caveats</td></tr>
<tr><td>• Automotive retail has been defined as SIC 50
• The sector also includes vehicle repair & maintenance (which results in large number of skilled trades people)</td></tr>
</table>

Sources	LSC/ SFA funded training provision	Policy & funding implications
• *Workforce profile*, IMI (June 2009) • *Automotivate – the sector skills agreement for the downstream motor industry – SSA Stage 5 – action plans – East of England*, IMI (March 2007)	• Relevant SSC is The Institute of the Motor Industry (which took over Automotive Skills) • The vast majority of learners are on Apprenticeships • Three quarters of Apprenticeships at Level 2 with two-thirds taken up by 16-18 year olds • Half of Train to Gain starts at Level 3 • The high levels of learners on Apprenticeships and Train to Gain courses indicate this is a sector of importance for the East of England	• Industry seems to be focused on recruiting school leavers. Is there an opportunity to recruit from a broader pool? • The high proportion of Train to Gain starts at Level 3 is encouraging as we will need fewer but higher skilled trades and technical staff • Do starts include sales and other staff or are these people being supported by generic skills courses?

Hotels & Restaurants

<table>
<tr><th>Employment trends & prospects</th><th>Skills issues</th><th>Sub-regional focus</th></tr>
<tr>
<td rowspan="3">
Approximately 145,000 employees in the hotels & restaurants sector in the region.
High proportions of female, young and part-time workers
Polarised employment structure with most staff in managerial or entry level roles
Some employment subject to seasonal trends with significant use of migrant workers
Employment levels remained broadly stable during the recession with slow growth forecast over the next five years
Largest employer is the restaurant sector
Employment prospects dependent on market trends, ‘staycation’, grey pound etc
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<td rowspan="3">
Total recruitment needs in the sector will be significantly higher than limited employment growth suggests due to high turnover
Highest turnover in entry level jobs – this is reflected in Jobcentre Plus notified vacancies
Management and supervisory skills important due to the labour intensive nature of the sector
Entry level skill needs tend to be generic – such as customer care and literacy & numeracy skills – rather than technical
Skill gaps seen as bigger issue than skill shortages
Skill shortages and gaps for chefs and cooks are frequently cited. This may increase as changing consumer tastes require knowledge of food provenance, new styles of cuisine etc
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<td>
Spatial distribution of employment reflects populations densities
However, also significant concentrations in popular tourist (domestic and international) destinations including urban, rural and coastal areas
</td>
</tr>
<tr><th>Sector definition & caveats</th></tr>
<tr><td>
Hotels & restaurants has been defined as SIC H
The sector is almost wholly covered by People 1st which also covers some tourism related activities such as travel agencies and gambling activities
</td></tr>
</table>

Sources	LSC/ SFA funded training provision for East of England	Policy & funding implications
• *The hospitality, leisure, travel and tourism sector in the East of England – regional profile*, People 1st, (October 2009) • *Hospitality, leisure, travel and tourism in the East of England – the skills employers want and the extent to which learning provision meets their needs – findings from the sector skills agreement*, People 1st (December 2006)	• Relevant SSC is People 1st • Apprenticeships make up over four in ten of employer responsive starts. This reflects young age profile of the workforce • Is low take up of Entry/ Level 1 training a missed opportunity for active labour market programmes • There is very little Level 3 or higher provision. However, management and generic skills such as customer care may be addressed through different SSBs • Much training is driven by legislative (eg health & safety) needs • People 1st research published in December 2006 found low take up levels of hospitality training in the East of England	• Hotels & restaurants is, potentially, an important sector for basic skills programmes and active labour market policies • Need to increase take up across the board but specific focus on higher level skills including entrepreneurship and marketing/ sales?

Transport & Logistics

Employment trends & prospects	Skills issues	Sub-regional focus
• Transport demand is heavily dependent upon the economy. Economic growth generates a need to move both people and freight • The sector shed several thousands jobs in the East of England during the recession. These will be recovered as the economy picks up. Demand is forecast to increase across most public transport services • However, notified Jobcentre Plus vacancies for drivers, particularly HGV drivers, remains muted • Large employers within the sector include road freight and the bus & coach industry • The region has a particular dependence on the sector due to its port and airport international gateways. There are clusters of employers around these gateways o Port expansion schemes should create a demand for new distribution and logistics facilities • The sector has relatively low levels of female and part-time employment but both are increasing	• Legislative and regulatory change are impacting on skills demand, sometimes directly by requiring mandatory training • The demand for low carbon transport options will also impact on skill needs • Increasingly complex supply chains are driving management and professional skills • The workforce is dominated by process, plant & machine operatives (including drivers) • This is reflected in qualification levels with about half of staff in the logistics sector not holding a Level 2 qualification. Many have literacy and numeracy needs • Employment structure is forecast to shift towards managers and customer service staff at the expense of skilled trades and operatives • Technical skill gaps include vehicle maintenance. Generic skill gaps include foreign language and job related IT skills • Need to better understand skills implications of port expansion plans	• Concentrations of employment around transport gateways and along transport corridors • Port expansions will be an important focus for future employment and skills demand **Sector definition & caveats** • Transport & Logistics has been defined as SIC 60-63

Sources	LSC/ SFA funded training provision	Policy & funding implications
• *Logistics sector profile: East of England*, Skills for Logistics (2009) • *East of England regional logistics skills agreement – action plan*, Skills for Logistics (2007) • *Sector skills assessment – England report*, GoSkills (February 2010)	• Relevant SSCs/ SSBs include: Skills for Logistics; GoSkills; British Parking Association • The majority of starts occur through Skills for Logistics and GoSkills • Almost all starts in Train to Gain, therefore significant for learner numbers, rather than for Apprenticeships, where it is of low importance • Over a fifth of Train to Gain beneficiaries aged over 50 in both SSCs • Virtually all beneficiaries undertaking Level 2 qualifications, presumably reflecting skill needs of operatives/ drivers?	• Do low levels of Apprenticeships reflect age limits on some driving roles or poor career image among young people?

Financial services

Employment trends & prospects	Skills issues	Sub-regional focus
• Employment was declining in the financial services sector even before the so-called credit crunch in 2007 as a result of productivity gains outstripping output growth • Many low value added support roles have been lost as a result of increased technology and offshoring • Employment has fallen faster in the East of England than nationally • Increasing levels of globalisation, continued efficiency drives, suppressed consumer demand and on-going globalisation are all likely to constrain future employment growth • Nationally, financial services employment is unlikely to return to its 2007 peak within the next decade	• In general there will be a shift along the value chain towards higher skilled roles as routine functions are moved abroad or automated • Phone and internet banking will reduce need for front-office employment • Increasing demand for higher level skills in areas such as leadership & management, risk management and compliance, product knowledge and advice, and cultural & language skills • Specialist skills needed in actuarial work and advanced mathematics • Sector struggles to compete with high street retailers and other employers for school leavers and lower qualified recruits. As a result, entry level candidates often lack numeracy, problem solving and people skills as well as basic industry and product knowledge	• There are concentrations of financial services employment in Norwich, Brentwood, Ipswich, Peterborough and Southend-on-Sea • However, even small towns have a retail banking presence • It is likely that many East of England residents commute to financial services jobs in London **Sector definition & caveats** • Financial services has been defined as SIC J • The sector specifically excludes professional services such as accountants • There are many financial staff working across other sectors • The Financial Services Skills Council does address the skills needs of accountants and people working within the finance function of other sectors

Sources	LSC/ SFA funded training provision	Policy & funding implications
• *Skills assessment: The financial services industry, the accountancy sector and the finance function in England*, Financial Services Skills Council (February 2010) • *Strategic skills needs in the financial services sector*, UKCES (March 2010) • *Financial services clusters*, Financial Services Skills Council (April 2008) • *Financial services survey*, CBI/ PricewaterhouseCoopers (March 2010) • *Twentytwenty vision – the future of financial services*, CBI/ PricewaterhouseCoopers (2010)	• Relevant SSC is Financial Services SSC • Two-thirds of starts for Apprenticeships • Six out of ten of Apprenticeships and Train to Gain at Level 3+ • Majority of Train to Gain even at Levels 3 and 4, being delivered to under 30s • Of low significance in terms of number of learners on both Train to Gain and Apprenticeships	• How will the Financial Services Academy shape and drive demand for training? • Despite reported difficulties in recruiting high calibre school leavers there is little focus on upskilling over 30s • Provision should be targeted at geographical concentrations of employment • Focus on Level 3+ skills reflects continuing decline in lower value added jobs and should be encouraged

Business services

Employment trends & prospects

- There are over 500,000 business services jobs in the East of England. The largest sub sectors are ‘recruitment, security & cleaning’ and ‘other tradable services’
- The recession impacted differently across the sub sectors but all are forecast to achieve significant growth over the next five years
- Business services are projected to account for half of net employment growth in the region
- Over half of all Jobcentre Plus notified vacancies are in the business services sector
- Many business services are dependent on the health of the economy as their customers are often other businesses. For example:
    - property related services are dependent on the fortunes of the development industry. Also, public expenditure constraints could impact on areas such as social housing
    - the majority of IT and telecoms professionals work in other sectors
    - accountants and lawyers provide important business support for SMEs
- prospects may improve in lower skilled roles if migrant workers discouraged by weaker labour market

Skills issues

- Forecast strong employment growth in the IT sector (and declining telecoms employment) masks more complex structural changes in the demand for staff. Many lower skilled jobs will continue to be outsourced with the UK workforce moving up the value chain and becoming more multi-skilled
- The IT workforce is ageing as employers prefer older candidates with interpersonal skills and business experience
- Project management and partnership working will be driven by difficult fiscal climate in the property/ housing sector
- Many older professionals may look at early retirement leaving skill gaps behind
- Continued focus on generic skills such as customer care and inter-personal skills in lower value added sectors such as security and cleaning
- Is call centre employment likely to grow and what will the skills implications of this be?
- Sectors such as facilities management and cleaning have no clear career or qualification pathways. This discourages employers and individuals from investing in skills

Sub-regional focus

- Services with a consumer/ SME market will tend to reflect spatial patterns of population and economic activity
- Property related services will see strongest demands in areas undergoing growth or regeneration

Sector definition & caveats

- Business services have been defined as SIC K
- Business services is a large heterogeneous sector including high value added services such as R&D, computing and ‘other tradable services’ such as legal, accountancy, advertising and architecture and low value added services such as security, cleaning and call centres
- Many business services are not covered by a SSC. The two most significant SSCs are e-skills and Asset Skills

Sources	LSC/ SFA funded training provision	Policy & funding implications
• *Technology for growth – IT & telecoms insights 2010*, e-skills uk (2009) • *Technology counts – IT & telecoms insights 2010 – England*, e-skills uk (2009) • *Evidence on skill needs, supply and gaps for business enterprise and business support*, SFEDI (January 2008) • *East of England fact sheet*, Asset Skills (February 2010) • *Adult advancement careers services – labour market information*, Asset Skills (undated) • *England sector skills agreement*, Asset Skills (January 2010) • *LMI preparatory research – key points* • *Note: BIS commissioned cluster report on professional and financial services not published at time of publication. This is expected to provide valuable LMI on the sector*	• Relevant SSCs/ SSBs include: e-skills; Asset Skills; Skills for Security; SFEDI • Much of the business services sector is not covered by a SSC. It is not clear to what SSBs cover any gaps • Learner numbers could be considered low given the scale of the workforce but it is likely that other training routes are more important to the industry. • Train to Gain is more focused on Level 2, with over half of Apprenticeships at Level 3 with a handful above Level 3. A quarter of Train to Gain starts are people aged 50+ • The vast majority of Asset Skills starts are in Train to Gain. The majority are at Level 2 with about a tenth at Entry Level and Level 1 • For Skills for Security, about three-quarters are in Train to Gain. Virtually all starts at Level 2	• Mapping business services – which will account for about half of all employment growth over the next five years – against SFA funded provision is not clear. It is important the sector's needs are addressed • Many skill needs across all levels are generic and will be provided by SSBs focusing on occupational or generic skills such as management, marketing and administration • IT provision looks low. Are employers accessing training from other sources or is market failure apparent? • SFA funding has a key role to play in those parts of the business services sector that rely on Level 2 and 3 skills • The sector provides many entry level jobs such as security and cleaning. Can training programmes provide career pathways for these people?

Public Administration

Employment trends & prospects	Skills issues	Sub-regional focus
• Employment in public administration has experienced long term employment growth • It was sheltered from the early impacts of the recession by the government's quantitative easing programme • However, tightening fiscal policy is beginning to impact on public services. Whilst redundancies have been slowing in most parts of the economy, 2010 has seen redundancies pick up across a range of public services • Jobcentre Plus notified vacancies are suppressed across many public service occupations • Employment is forecast to decline over the next five years as public services come under increasing pressure to deliver efficiency gains • Employment in the justice sector is forecast to decline more steeply in the East of England than nationally	• In general, there is a shift from lower skill to higher skill jobs • There is a need to raise professional standards – public services employ a wide range of professionals • However, in some specific areas, lower grade/ skilled staff are growing strongly, eg police community support officers • Increasing pressure to achieve efficiencies through coordination and integration of services will increase need for partnership working and related skills • Existing generic skill gaps such as IT, customer service and communication must be addressed • East of England justice sector staff are the least well qualified in England. This may be replicated elsewhere in public services?	• Public administration employment concentrated in towns with a strong local government function – unitary authorities, county councils – such as Chelmsford, Norwich, Ipswich, Luton, Southend **Sector definition & caveats** • Public administration is defined as SIC L • Disaggregating employment across public services can be problematic • Much of the sector is not covered by a SSC – Government Skills does not cover local government

Sources	LSC/ SFA funded training provision	Policy & funding implications
• *Building professional skills for government*, Government Skills (undated) • *Employment and skills within the justice sector in England – workforce needs, skills priorities and scenarios – executive summary*, Skills for Justice (May 2010) • *Employment and skills within the justice sector in England – workforce needs, skills priorities and scenarios*, Skills for Justice (February 2010)	• Relevant SSCs include: Government Skills; Skills for Justice • Local government is not included within a SSC • The lowest sector specific take up for employer led training • Relatively small numbers of Apprenticeships through Government Skills. All at Level 2 and most beneficiaries under 25. Very few Apprenticeships through Skills for Justice – all at Level 3 • No Train to Gain beneficiaries through Government Skills • The numbers of Train to Gain beneficiaries through Skills for Justice are of low significance. All at Level 3 (over half) or above (around four in ten). Mainly aged below 30 • Very few providers delivering on behalf of SSCs	• Many skill needs for both high and low skill needs are generic and may be provided by SSBs focusing on occupational or generic skills such as management, customer service and administration • Need to increase take up of Apprenticeships and Train to Gain in the public sector • Ensure older workers (30+) are being supported • Assess whether public sector workers outside of SSCs are able to access appropriate learning opportunities. How is local government meeting its training needs? • Public sector has been ineligible for Train to Gain for part of last 3 years

Education

Employment trends & prospects	Skills issues	Sub-regional focus
• The education workforce has grown substantially over the last 20 years. However, public expenditure constraints mean that the workforce is likely to fall over the next few years. Job cuts are likely to be heaviest across lower skilled roles • There have been a number of redundancies reported recently, particularly in the FE sector • There are about 70,000 staff within the LLUK footprint. The majority of the remaining 170,000 staff in the sector are likely to be general primary and secondary education • Within the LLUK workforce the largest sectors are Further Education and Higher Education • The workforce is highly skilled with the majority of staff within the managerial, professional and associate professional occupations • Many of the job losses are expected to be within the lower skilled occupations. Recent growth in educational assistants may stall	• Nearly half the LLUK workforce is aged over 45 and it is estimated that almost a quarter of the current workforce will retire before 2018. Therefore, despite projected falling employment, recruitment needs are likely to increase • Existing skill gaps are focused on generic skills such as customer handling, problem solving and communication • Training participation is uneven with parts of the community learning and development and work based learning sectors the least likely to benefit	• Employment tends to be concentrated around major higher, and to a lesser extent, further education institutions • School and community learning related employment is more evenly spread **Sector definition & caveats** • Education is defined as SIC M • LLUK does not include general primary and secondary education

Sources	LSC/ SFA funded training provision	Policy & funding implications
• *East of England factsheet*, Lifelong Learning UK (2009)	• Relevant SSCs/ SSBs include: LLUK; TDA; CWDC. (It is assumed that most of the CWDC workforce come under the Health sector) • Excluding CWDC there is very little sector specific provision • There is virtually no Apprenticeship route, with few delivered by TDA, mainly at Level 3 • TDA delivered the majority of starts through Train to Gain. The majority were at Level 2 and most beneficiaries were aged 31-49 • LLUK delivered a minority of mainly Level 3, Train to Gain starts	• Most of the workforce in the education sector is already qualified to Higher Education level and therefore demand for vocational Level 2/3 qualifications can be expected to be low • Nevertheless, numbers are very low given that a significant minority of the workforce will work in lower and intermediate skilled roles. Are their needs being met through other occupational/ generic focused SSCs/ SSBs? • Given forecast retirement levels the sector may need to recruit older workers from other sectors rather than rely on 'education leavers'. Are there suitable vocational progression paths in place?

Health & Social Care

Employment trends & prospects	Skills issues	Sub-regional focus
• There are about 280,000 people employed in the health and social care sector – 1 in 8 of the regional workforce • This can be crudely split 60:40 health: social care • Employment has grown strongly in both sectors in recent years • The implications of public expenditure constraints are unclear. The government is committed to protecting health budgets but there will still be strong pressure to deliver efficiency savings • Pre-recession expectations from both SSCs were for continued employment growth. The latest EEFM forecast is for employment to plateau from 2010 • Jobcentre Plus notified vacancies have fallen across most health and social care occupations over the last year	• There is likely to be increased demand for healthcare staff at all levels – professional (eg doctors), associate professionals (eg nurses) and caring personal services (eg nursing auxiliaries) • Continued feminisation of the (general) workforce will increase demand for childcare services • Ageing population will increase demand for eldercare services • Literacy and numeracy are still issues in lower order occupations. 15% of health sector workforce qualified to Level 1 or below • New service delivery models and technologies will continue to stimulate demand for higher skills • In particular, greater flexibility of workforce will require a more flexible qualification framework allowing staff to progress and move across roles	• Health & social care accounts for at least 5% of employment in all districts in the East of England • This proportion is significantly higher in most districts and reaches about 1 in 6 jobs in areas with major health facilities **Sector definition & caveats** • Health & social care is defined as SIC N • Skills for Care & Development also covers pre-primary education

Sources	LSC/ SFA funded training provision	Policy & funding implications
• *UK sector skills agreement for the social care, children, early years and young people's workforces*, Skills for Care & Development (February 2010) • *Skills for Care and Development footprint statement*, Skills for Care and Development (undated) • *Labour market themes & trends: summary for the social care, children's, early years and young people's workforces in the UK*, Skills for Care & Development (undated) • *A sector skills agreement – East of England health sector – Summary*, Skills for Health (October 2007) • *Skills for Health: skills and labour market intelligence – East of England briefing*, Skills for Health (August 2009) • *A pilot study to explore the feasibility of using occupational summary sheets t map key workforce intelligence data for the CWDC sector skills footprint in four regions – East of England, East Midlands, South East England & Yorkshire & the Humber*, CWDC (2008)	• Relevant SSCs/ SSBs include Skills for Care and Development; Skills for Health; CWDC • This sector had the highest number of Train to Gain starts in the East of England and accounted for one-tenth of all Apprenticeship starts • The majority of Train to Gain delivery is organised jointly through Skills for Care and Development and Skills for Health • Apprenticeships are delivered between CWDC and Skills for Health • The sector is training older people reflecting the age structure of existing workforce – significant numbers of over 24s taking Apprenticeships and over 50s participating in Train to Gain	• A significant proportion of both Apprenticeship and Train to Gain funding is allocated to the health & social care sector • This should continue given future needs of the sector • There is scope to use training programmes to recruit more young people into the sector • Small number of people training at level 4+. This may need to increase if progression routes are to be fully developed? • Health sector is particularly subject to legislative drivers for specific qualifications

Other services (including personal, community, creative & cultural)

Employment trends & prospects	Skills issues	Sub-regional focus
• Other services are a broad based collection of services including creative media, culture, active leisure and personal services (such as hairdressing). Much of the growing digital economy sits within the sector • Digital technology is a key driver for productivity and competitiveness of many other sectors • The sector experienced strong employment growth across most of its sub sectors prior to the recession. Whilst the recession temporarily halted this growth, normal service is expected to be resumed. About 160,000 jobs in the sector in 2009 • High value added sub sectors such as creative media are heavily influenced by technology and innovation drivers. Lower value added services such as hairdressing are more dependent on changing consumer tastes and demographic trends • Productivity varies considerably across sub sectors reflecting different levels of skills and capital intensity • East of England has a higher than average proportion of workforce in creative and cultural industries aged below 40 (68%). Active leisure also has young workforce profile	• Many sub sectors have a high dependence on very small businesses and self employment. This means that training levels tend to be low • Many sub sectors have a relatively poor qualified workforce. For example, in creative & cultural only 46% qualified at NVQ4+. This compares poorly with a UK rate of 54% • Even in sub sectors where qualification levels are relatively high these are not always sector specific • In the creative industries many people are likely to have shifted from employee to freelance status during the recession. There is a danger that these people will be lost altogether to the sector • Much training is undertaken through private providers with formal qualifications often not recognized • There is a potential over supply of entrants to parts of the creative media sector with many new recruits working for free/ volunteering to gain a foothold in the sector. However, skills shortages exist for specific skills • Demand for volunteers may increase (due to the Olympics). Increasing skills demands are being placed on these at a time when their recruitment may become more difficult	• Services dependent on consumer markets (active leisure, personal services) tend to match the spatial distribution of population • Royal Opera House Production Park will be a key training resource for the region • There are clusters of creative media in Hertfordshire (film), Norwich (TV and animation) and Cambridge (computer games, new technology) **Sector definition & caveats** • Other services have been defined as SIC 91-99. In practice the majority of employment falls within SIC 91-93 • The key SSCs – Skillset, SkillsActive and Creative & Cultural all cover industries beyond this definition

Sources	LSC/ SFA funded training provision	Policy & funding implications
• *Sector skills assessment – Active leisure, learning and well-being: England*, Skills Active (February 2010) • *Analysis of gaps and weaknesses: Hair and beauty sector – UK*, Skills Active/ HABIA (February 2008) • *Industry statistics*, HABIA (November 2008) • *Strategic skills assessment for the creative media industry*, Skillset (December 2009) • *Strategic skills assessment for the creative media industries in England*, Skillset (January 2010) • *Creative & cultural skills: Sector skills agreement for the creative and cultural industries (England report)*, Creative & Cultural Skills (February 2010) • *Creative choices – East of England impact and footprint*, Creative & Cultural Skills (2008)I	• Relevant SSCs/ SSBs include Creative & Cultural Skills; HABIA; Skills Active; Skillset • 4 in 5 starts are through Apprenticeships, resulting in the second highest sector of importance in this area of learning • Around two-thirds of all starts (seven in ten of Apprenticeships) within the sector delivered through HABIA. This is mainly Level 2 for 16-18 year olds • Virtually no delivery related to C&CS and Skillset • Skills Active – starts split almost evenly between Apprenticeships and Train to Gain. Four in ten of Apprenticeships at Level 3 • Some delivery for the sector likely to be through generic providers or other SSBs, eg playwork delivered through CWDC • However, much of the sector is not using employer responsive services and is of low sector importance for Train to Gain	• Parts of the sector are benefitting very little from Apprenticeship and Train to Gain programmes. Is this because the private sector training market is working well or is there market failure? • It seems likely that these services could support cultural and creative services better than they currently are • Can programmes better support self employed/ freelancers? • Funding restrictions mean that HABIA provision is focused on level 2 for 16-18 year olds. This is unlikely to change unless the funding rules change

Annex 1: A note on sources

Underpinning this statement is a detailed set of data and information on the take up of skills training by industry sector (by both the sector qualification and SIC footprints) in the region, produced by the Data Service from Skills Funding Agency learner data.. This sectoral analysis is not currently available as part of the Government's published Statistical First Release, and therefore cannot be referenced or included within the Statement. For further regional information from the Statistical First Release, please visit http://www.thedataservice.org.uk/statistics/statisticalfirstrelease/

Labour market intelligence

Each sector analysis includes a list of the key reports that have been used. However, a number of more general, or cross-sectoral, reports have also been used. For convenience these are listed below:

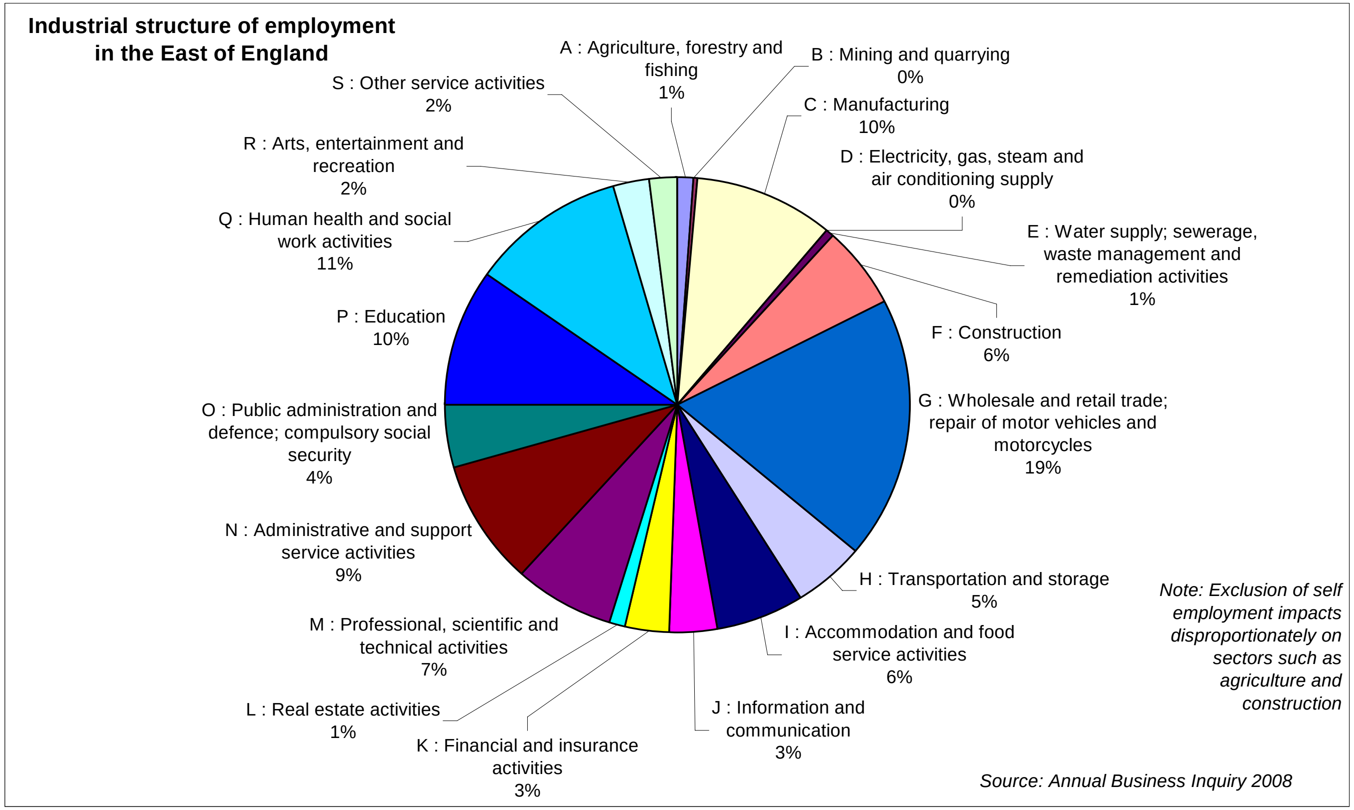
- *Skills for jobs: Today and tomorrow – the national strategic skills audit for England 2010 (Volume 2: the evidence report)*, UKCES (2010)
- *Expertise and excellence in NINJ technologies – final national report to the RDA network*, Technopolis, CURDS and GHK (November 2009)
- *Identification of the national spatial distribution of expertise and excellence for key 'new industry, new jobs (NINJ) industrial technologies – regional report: East of England*, GHK, Technopolis & CURDS (December 2009)
- *Strategic skills assessment for the digital economy*, Skillset, Creative & Cultural Skills & e-skills UK (2009)
- *East of England low carbon innovation evidence base*, Innovas Solutions Ltd, (November 2009)

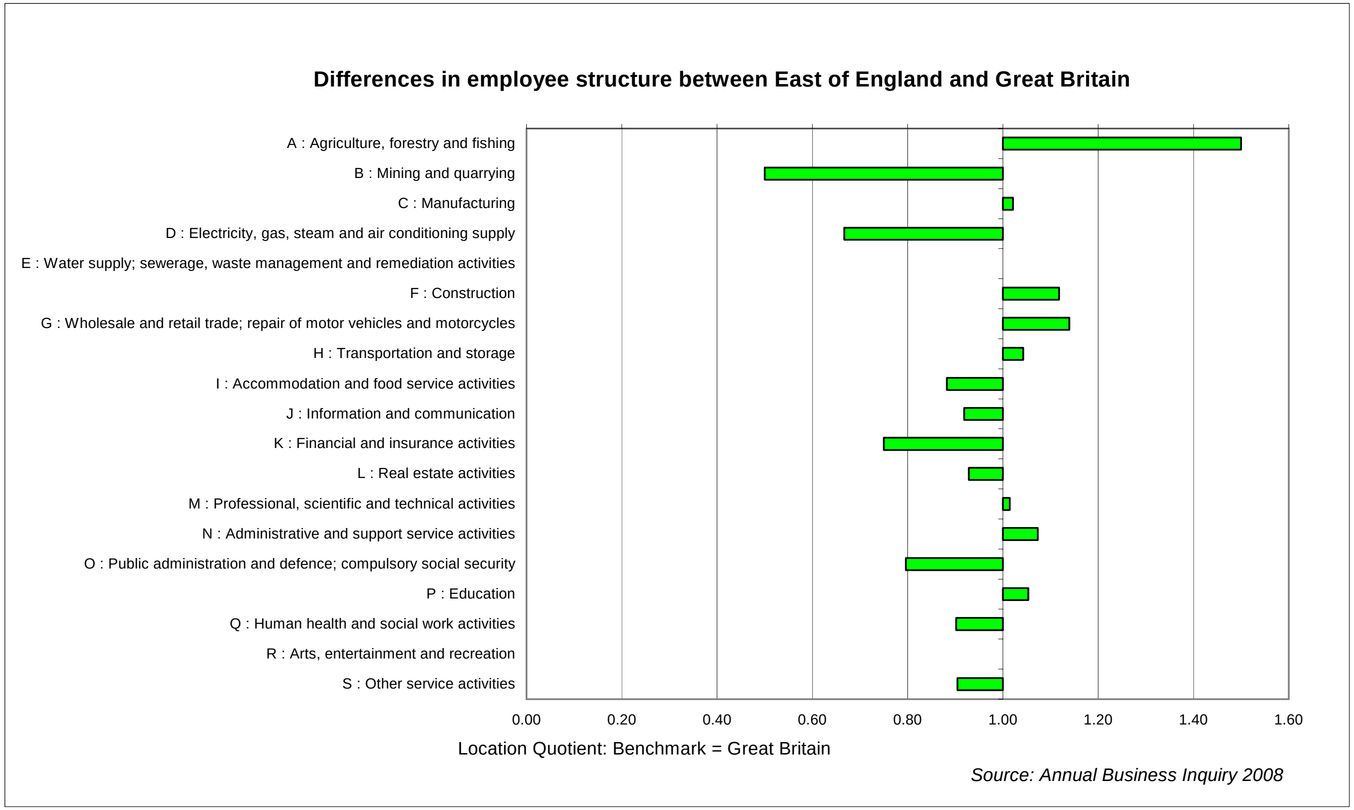
Relationship between EEFM sectors and SSCs/SSBs

EEFM sector	SSC/SSB	
	Clear fit	*Unclear fit or spans more than one sector*
Agriculture		Lantra
Extraction		Proskills
Food & drink	Improve	
Other low tech manufacturing	Skillfast UK	Proskills
Metals & engineering	SEMTA	
Chemicals & process inds		Cogent; Proskills
Other Manufacturing & recycling		
Electricity, gas & water	Energy & Utility Skills	Cogent
Construction	Construction Skills; ECITB; Summit Skills	Asset Skills
Distribution		
Retail	Automotive skills; Skillsmart Retail	
Hotels & restaurants		People 1st
Transport & comms	British Parking Association; GO-Skills; Skills for Logistics	
Financial services	Financial Services Skills	

Business services	Skills for Security; SFEDI	Asset Skills; Creative & cultural; e-skills UK
Public admin & defence	Government Skills; Skills for Justice	
Education	Lifelong Learning UK; TDA	CWDC
Health	Skills for Care & Development; Skills for Care/ Skills for Health; Skills for Health	CWDC
Other personal services	Skills Active; Skillset; Habia	Creative & cultural; People 1st
Generic / occupational skills	Council for Administration; ENTO; e-skills/ Council for Administration; Institute for Customer Services; Management; Marketing & Sales	e-skills UK

Annex 2: Skills Insight charts and tables




Differences in employee structure between East of England and Great Britain
A : Agriculture, forestry and fishing
B : Mining and quarrying
C : Manufacturing
D : Electricity, gas, steam and air conditioning supply
E : Water supply; sewerage, waste management and remediation activities
F : Construction
G : Wholesale and retail trade; repair of motor vehicles and motorcycles
H : Transportation and storage
I : Accommodation and food service activities
J : Information and communication
K : Financial and insurance activities
L : Real estate activities
M : Professional, scientific and technical activities
N : Administrative and support service activities
O : Public administration and defence; compulsory social security
P : Education
Q : Human health and social work activities
R : Arts, entertainment and recreation
S : Other service activities
0.00
0.20
0.40
0.60
0.80
1.00
1.20
1.40
1.60
Location Quotient: Benchmark = Great Britain
Source: Annual Business Inquiry 2008

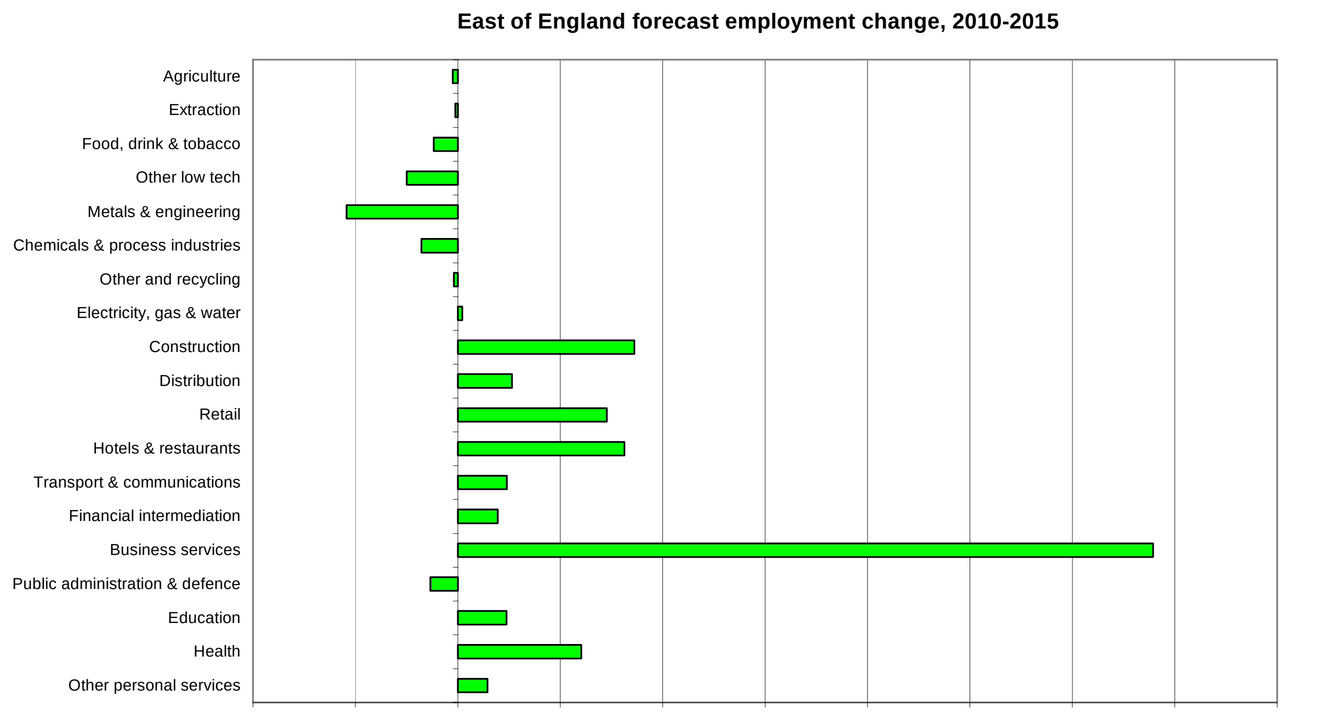
Employee concentrations in the East of England

Sector	Employees	percent	LQ (Benchmark = GB)
01 : Crop and animal production, hunting and related service activities	28,339	1.18	1.51
101 : Processing and preserving of meat and production of meat products	12,156	0.51	1.87
103 : Processing and preserving of fruit and vegetables	4,425	0.18	1.51
109 : Manufacture of prepared animal feeds	2,581	0.11	2.22
1721 : Manufacture of corrugated paper and paperboard and of containers of paper and paperboard	2,780	0.12	1.24
18 : Printing and reproduction of recorded media	15,262	0.64	1.23
21 : Manufacture of basic pharmaceutical products and pharmaceutical preparations	6,348	0.27	1.68
2222 : Manufacture of plastic packing goods	3,922	0.16	2.05
2229 : Manufacture of other plastic products	4,938	0.21	1.22
254 : Manufacture of weapons and ammunition	2,508	0.10	2.06
26 : Manufacture of computer, electronic and optical products	22,195	0.93	1.78
27 : Manufacture of electrical equipment	9,638	0.40	1.25
281 : Manufacture of general purpose machinery	6,256	0.26	1.38
282 : Manufacture of other general-purpose machinery	10,252	0.43	1.36
283 : Manufacture of agricultural and forestry machinery	2,149	0.09	4.50
2896 : Manufacture of plastics and rubber machinery	2,058	0.09	1.55
291 : Manufacture of motor vehicles	7,669	0.32	1.23
3312 : Repair of machinery	3,351	0.14	1.22
3316 : Repair and maintenance of aircraft and spacecraft	2,921	0.12	1.59
36 : Water collection, treatment and supply	3,199	0.13	1.22

42 : Civil engineering	29,007	1.21	1.31
439 : Other specialised construction activities n.e.c.	16,557	0.69	1.22
45 : Wholesale and retail trade and repair of motor vehicles and motorcycles	51,723	2.16	1.21
46 : Wholesale trade, except of motor vehicles and motorcycles	120,013	5.02	1.20
479 : Retail trade not in stores, stalls or markets	10,187	0.43	1.32
52 : Warehousing and support activities for transportation	39,897	1.67	1.21
552 : Holiday and other short stay accommodation	3,747	0.16	1.30
553 : Camping grounds, recreational vehicle parks and trailer parks	2,848	0.12	1.33
611 : Wired telecommunications activities	2,725	0.11	4.80
712 : Technical testing and analysis	5,255	0.22	1.44
72 : Scientific research and development	20,854	0.87	2.08
75 : Veterinary activities	4,308	0.18	1.26
772 : Renting and leasing of personal and household goods	2,760	0.12	1.31
7912 : Tour operator activities	4,019	0.17	1.61
811 : Combined facilities support activities	6,956	0.29	1.20
813 : Landscape service activities	5,862	0.24	1.34
851 : Pre-primary education	9,481	0.40	1.92
873 : Residential care activities for the elderly and disabled	25,632	1.07	1.27
9104 : Botanical and zoological gardens and nature reserve activities	2,221	0.09	1.52
9319 : Other sports activities	3,515	0.15	1.54

Note: All industries included where East of England has more than 2,000 employees and a location quotient of more than 1.20 (Benchmark = Great Britain). All industries have been grouped to the highest level where the location quotient still achieves a score of 1.20.

Source: Annual Business Inquiry 2008 (NOMIS)



Source: East of England Forecasting Model (2009 Autumn baseline forecast), EEDA