

Health and Life Sciences
West of England Local Sector
Skills Statement 2017



Working together to develop the current
and future skills of the sector.

Health and Life Science Local Sector Overview

The health and life sciences sector is the largest single employer both nationally and in the West of England. There are a wealth of employers in the region including businesses, providers and social enterprises all offering rewarding and varied careers. Employment in the sector accounts for 15% of all employment in the UK.

As of 2017, there were a total of 77,869 people employed in the health and life sciences sector in the West of England, up from 73,000 in 2012.

The sector generates an annual turnover of £56bn and ranks top in Europe in attracting foreign direct investment. But these are by no means the only benefits the sector confers on the UK. As well as contributing to the economy, a vibrant UK life sciences sector is delivering life-saving and life-enhancing medical technologies to patients.

Between 2013 and 2020 employment forecasts anticipate that the sector will increase by approximately 5% equating to the creation of approximately 3,700 jobs. Due to the size of this sector, significant natural churn/turnover will also occur, resulting in several thousand more jobs becoming available during this period. Across the UK the life sciences sector alone a recent PwC report in March 2017 estimated that 482,000 UK jobs were supported by the life sciences industry.

Employment Areas



All data represents the West of England

Businesses in the sector range from health and social care providers to multinationals in the medical technology, biotechnology and pharmaceutical sectors.

To cope with this level of growth, and to deal with national and regional challenges in an uncertain political time, new training standards, transferable skills and progression pathways are creating a new era of opportunity.

Additionally, the West of England is home to a fast growing number of private sector companies and social enterprises which are focused on health and life science fields and driving innovation in areas such as assisted living, diagnostics, electronics, clinical management, operational management and hospital infrastructure.

Annual Local Sector Skills Statements report on local sector knowledge and expertise, plus wider regional and national intelligence. Gain insight about skills challenges in your sector, notable achievements and skills priorities and objectives for 2017. The themes have been defined by the West of England Local Enterprise Partnership (LEP). This report has been designed for education providers and businesses to inform decisions and identify objectives for investment in training and development of curriculums.

Key Facts



IF THE ADULT SOCIAL CARE WORKFORCE GROWS PROPORTIONALLY TO THE PROJECTED NUMBER OF PEOPLE AGED 65 AND OVER, THEN **THE NUMBER OF ADULT SOCIAL CARE JOBS WILL INCREASE BY 275,000 (18%) BY 2025**, TAKING THE NUMBER OF JOBS TO 1.83 MILLION.⁽¹⁰⁾



HEALTH EDUCATION ENGLAND INCREASED THE NUMBER OF FUNDED APPRENTICESHIP STARTS FROM **9,640 IN 2012/13 TO 11,083 IN 2013/14**.⁽⁵⁾



THE WEST OF ENGLAND LEP EMPLOYER SKILLS SURVEY (2016) HIGHLIGHTED THAT **HEALTH AND LIFE SCIENCE BUSINESSES OFFERED THE MOST APPRENTICESHIPS** (TOGETHER WITH ADVANCED ENGINEERING AND AEROSPACE) **PER SECTOR**.⁽¹⁾



UP TO 75% OF PEOPLE ABOVE THE AGE OF 75 WILL SUFFER FROM CHRONIC DISEASE BY 2030. MANY PEOPLE WANT TO STAY IN THEIR OWN HOMES AS THEY AGE SO **THERE IS GREAT POTENTIAL FOR INTELLIGENT TECHNOLOGIES TO SUPPORT THIS INDEPENDENT LIVING IN LATER LIFE**.⁽¹³⁾

YOUNG PEOPLE ARE STILL UNDER-REPRESENTED IN THE SECTOR, WITH AN AVERAGE WORKING AGE OF 41.⁽⁵⁾



IN ADULT SOCIAL CARE ALONE **THE MAJORITY (OVER 80%) ARE FEMALE** AND BETWEEN 19% AND 25% ARE OVER 55 YEARS OF AGE, GIVING RISE TO THE FACT THAT POTENTIALLY BETWEEN 6000 TO 7000 PEOPLE MAY RETIRE IN THE NEXT 10 YEARS.⁽³⁾



THE WEST OF ENGLAND LEP EMPLOYER SKILLS SURVEY (2016) ILLUSTRATED THAT OF THE **80%** OF BUSINESSES WITH **VACANCIES IN THE LAST 12 MONTHS, 74% HAD FOUND THESE VACANCIES DIFFICULT TO FILL**.

THE SURVEY APPEARS TO SHOW ACUTE SECTOR SPECIFIC TECHNICAL SKILLS GAPS IN THE HEALTH AND LIFE SCIENCES SECTOR AND A HIGHER THAN AVERAGE PERCEIVED SKILLS GAP IN THE AREA OF GENERAL BUSINESS SKILLS AND LEADERSHIP AND MANAGEMENT.⁽¹⁾



HARD TO FILL VACANCIES



RESPONDENTS TO THE WEST OF ENGLAND LEP EMPLOYERS SKILLS SURVEY (2016) EXPRESSED **A HIGHER THAN AVERAGE SATISFACTION** ACROSS ALL FORMS OF PROVISION (INDEPENDENT TRAINING PROVIDERS – **98%**, FURTHER EDUCATION – **92%** AND HIGHER EDUCATION **100%**)

MCKINSEY HAVE ESTIMATED THAT **SAVINGS OF BETWEEN £8BN AND £14BN** COULD BE GENERATED FOR THE NHS BY 2020/21 THROUGH NEW DIGITALLY ENABLED SERVICES.⁽¹⁴⁾



ENGINEERING UK ESTIMATES THAT ENTRY TO THE MORE TRADITIONAL AND CHALLENGING SCIENCE SUBJECTS HAVE FALLEN. **3.3%** DECREASE IN ENTRIES TO GCSE CHEMISTRY, BIOLOGY ENTRIES ARE **1.9%** DOWN AND PHYSICS ENTRIES DOWN BY **2.6%**, FROM **137,227 TO 133,610**.



THE TOTAL VALUE OF HEALTH AND LIFE SCIENCE GOODS EXPORTS WAS APPROXIMATELY £27BN AND THE VERY LATEST TRADE DATA SHOWS A **23% GROWTH IN EXPORTS OF PHARMACEUTICAL GOODS** IN THE FIRST THREE QUARTERS OF 2015.⁽¹⁴⁾



Notable Local Sector Achievements



UWE Bristol's Future Space newly-created offices, workshops and lab-space for science and tech-based businesses in the University Enterprise Zone (UEZ) has been explicitly designed to encourage innovation, collaboration and inspiration. Situated on Frenchay Campus, Future Space supports businesses working in high-tech areas such as robotics, digital and creative technologies, health tech and biosciences.

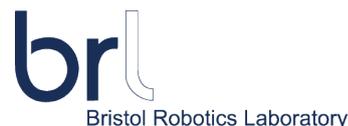
In January 2017, the **Centre for Graduate Entrepreneurship** launched its 3 year programme to support graduate entrepreneurs to explore enterprising ideas and create a new company. The centre will deliver a range of business development programmes to support the creation and running of a company. It is based at the University of the West of England (UWE Bristol) but also works across the South West of England.

The Health Technology Hub, located in the University of the West of England's £16m University Enterprise Zone, will open its doors early in 2018. It will support the development, evaluation and trialling of new products and innovations relating to independent living and home-based diagnostics. A key focus will be on helping companies tap into University facilities and resources, and to facilitate collaborations with the region's research community.

The University of the West of England's **Launch Space** provides incubator residencies and innovation support to graduate start-up enterprises. It forms part of a wider business community, alongside the Future Space incubation facility and Bristol Robotics Laboratory – making it a great environment for graduate entrepreneurs from any UK university to flourish. Based on the Frenchay Campus, it supports enterprises from across the West of England.



North Bristol NHS Trust is one of England's first Excellence Centres and is part of an initiative to improve training for healthcare support staff. The National Skills Academy for Health - North Bristol NHS Trust Excellence Centre is one of six established as part of a pilot programme co-funded by the Department for Business, Innovation and Skills.



The West of England is home to the **Bristol Robotics Laboratory (BRL)**, the most comprehensive academic centre for multi-disciplinary robotics research in the UK. At the BRL, the Anchor Robotics Personalised Assisted Living Studio is an in-house facility to develop, test and implement assistive robots and heterogeneous sensor systems to help develop personalised assistive robotic systems, especially adapted to each person's lifestyle to support independent living.

Two new employer-led apprenticeship standards have been developed and approved for delivery for Healthcare Support Worker (Level 2/3) and Assistant Practitioners (Level 4/5). **Adult Social Care** has developed new standards for four job roles (Adult Care Worker L2, Lead Adult Care Worker L3, Lead Practitioner in Adult Care L4 and Leader in Adult Care L5).



Employers from both health and social care have been working alongside learning providers and **Jobcentre Plus** to offer a 6-10 week package of college based learning and practical work experience, with the aim of attracting a more diverse workforce.



In 2015, the University of Bath opened the **Bath Centre for Healthcare Innovation and Improvement (CHI²)** as part of the School of Management. It leads and explores health research projects with the aim of solving the practical challenges of health and social care problems.



1. Improve Careers Education Information Advice and Guidance (CEIAG)

Issue:

Ambassadors have been established across colleges in the West of England to promote the health and life sciences sector in schools and communities. However young people are still under-represented in the sector with an average workforce age of 41 years⁵. Skills for Care estimates that 6.9% of roles in the sector were vacant, which means 9,000 vacancies at any one time³. The sector therefore, still needs to broaden the routes into training and employment, especially to attract more young people and improve diversity within the workforce. In adult social care alone the majority (over 80%) are female and between 19% and 25% are over 55 years of age giving rise to the fact that potentially between 6000 to 7000 people may retire in the next 10 years.

Objectives:

- Increase the opportunities for people to try new experiences of working in the health and life sciences sector.
- Focus on delivering industry-led career activities in partnership with national or local initiatives.
- Support ambassadors to engage with schools and colleges to promote the industry as a career choice and provide information about the range of entry routes into health and social care roles (e.g. traineeships, funded apprenticeships and pre-employment training), including clear progression routes.
- Careers information should support the promotion of STEM subjects and provide consistent information about entry routes into careers in the health and life sciences sector.
- Support improvements to careers information and job application processes, including a review of the NHS Careers website.
- Develop local partnerships with employers and the Department of Work and Pensions to help individuals to access pre-employment training.
- Support the government's skills plan in promoting high-level technical education across the health, social care and life sciences sector.
- Develop clear pathways that enable bridging between technical and academic education.
- Participate and support the 'Proud to Care' campaign in the region. A "Proud to Care" campaign is expanding across the South West with support from HEE SW and SW ADASS. This brings together representatives from a range of providers including: Job Centre Plus, Skills for Care, Health and Social Care and the voluntary sector, to look at ways of improving recruitment and selection. The group's focus is primarily workforce issues such as recruitment, skills development and retention, to address shortages in the care sector.



2. Improve the quality and local responsiveness of education and training

Issue:

The sector experiences specific skills gaps with emerging skills requirements resulting from the use of digital technologies in the health and social care sector for analysing and interpreting personal health data, these skills gaps may increase if left unaddressed. There is the perception that leadership and management skills are also important to business growth⁽¹⁾. Employers need to invest in the development of support staff and implementation of a Care Certificate is a step towards standards across both health and social care but there is now a need to push further to implement a Higher Care Certificate.

The health and life science sector finds it hard to address skills gaps. In the West of England LEP Employer Skills Survey (2016), 26% of responding businesses for this sector reported that skills needs are harder to address than three years ago – higher than the average across all sectors.

Objectives:

- Develop consistent and transferable standards for the wider support workforce, building on the current developments for healthcare assistants and skills passport.
- Encourage employers to commit to and implement the Higher Care Certificate, the Level 2 Diploma in Health and Social Care or the new apprenticeship standard for Adult Care Worker L2 as a progression route from the Care Certificate with universal access for those that want it.
- Simplify career progression with innovative new roles and pathways to promotion, including more part-time higher education routes into nursing and other registered professions.
- Agree with employers and education providers a universal acceptance of prior learning, vocational training and qualifications. Organisations to develop strong partnerships with education providers to deliver training that is closely matched to what the service needs and develops emerging technical skills.
- Develop a seamless progression route from vocational qualifications into professional training with greater consistency of entry requirements by higher education providers.
- Develop technical provision that meets the increasing high level technical skills demanded by the sector.
- Create technical education provision that supports the government's ambition to ensure that every young person is presented with the option of world-class technical education on par with academic education.



3. Increase apprenticeship starts and availability of higher apprenticeships

Issue:

The West of England LEP Employer Skills Survey (2016) showed that of the respondents currently offering apprenticeships, health and life science businesses jointly offered the most per sector (35%)⁽¹⁾. Forecasts suggest greater demand for higher level technical and specialist skills in the future and therefore higher apprenticeships need to be promoted in the health, social care and life science sector. Businesses need to be made aware of changes regarding the Apprenticeship Levy and reforms to know how best to benefit. Young people are still under-represented in the industry, there is a need to increase traineeships and sector routeways for pre-employment and training (short courses) to attract young people and show progressions into apprenticeships. New standards are taking time to come online and End Point Assessment is not yet clarified across all standards. Also, the delayed timelines in the establishment of the new ROATP (Register of Apprenticeship Training Providers) has led to some standards not being delivered in some areas.

Objective:

- Continue to review the development of apprenticeships as part of the new apprenticeship standards.
- Increase the availability of apprenticeships and higher apprenticeship provision locally for priority job roles identified by organisations e.g. apprenticeships in Health Informatics, Health Pharmacy Services and higher apprenticeships in management^(4&5), supply chain management⁽⁵⁾, Life Science and Chemical Science.
- Development of a higher apprenticeship in adult nursing as a vocational and part-time route into becoming a registered professional.
- Work with higher education to become early adopters of new bridging programmes.

4. Engage SMEs to boost productivity and build capacity for growth



Issue:

Demand for care and support of the growing numbers of older people is driving growth in the sector. In the West of England LEP Employer Skills Survey (2016) the most commonly cited factor influencing current skills priorities is business growth.⁽¹⁾ Skills priorities in the health and life sciences sector are sector specific technical skills, followed by leadership and management and generic business skills.

The survey showed 35% of responding health and life science businesses were offering apprenticeships, however when responding to whether businesses were likely to offer apprenticeships in the future, 60% responded no⁽¹⁾. Efforts should focus on encouraging businesses to see apprenticeships as a tool for business growth.

Innovation and growth in the sector is reliant on young people with strong STEM skills. Decreases in the take up of STEM subjects threaten the growth of the health and life science industry.

Objectives:

- Work with all partners including; Skills for Health, Skills for Care, West of England LEP sector group and health and life sciences employer networks to raise awareness of apprenticeship reforms and local provision to support SMEs.
- Support the work of Medilink to regularly inform the industry of available provision, current skills demands and emerging skills needs along with the importance of investing in skills to aid business growth.
- Work with SMEs with specific demand levels to understand the specific job roles and bring business and education together to co-design provision to support future talent e.g. the use of high tech and engineering skills within the industry sector to address health issues within the community.
- Support local and national education initiatives focused on the promotion of STEM subjects and careers progression routes within the industry.
- Raise awareness of the leadership and management opportunities available through Medilink SW.



5. Enhance equality and diversity through multiple career pathways

Issue:

Increasing demand for services, falling unemployment, and the sectors reliance on migrant labour is a significant and pressing challenge for the sector. With the government committed to reducing rates of migration into the UK, it is important that skill shortages do not result from any restrictions on migration. In 2017 there has already been a significant decrease in the number of applicants to nursing training. The health and life science industry is predominantly female and young people are under-represented. Respondents to the West of England LEP Employers Skills Survey (2016) reported an average workforce age of 41 years.

To be successful, organisations will have to attract a diverse support workforce that reflects the communities they serve. There is a need to raise awareness in the jobs market and among young people, parents and careers advisers the range of fulfilling careers offered by the NHS.

Objectives:

- There should be a focus on working with community groups, Jobcentre Plus etc. to review current unemployment initiatives in order to develop an effective means of providing those detached from the labour market with the skill-sets to enter the health and life sciences industry.
- Pre-employment programmes or equivalent should be delivered with local partners to support disadvantaged individuals into jobs and training.
- Encourage employer involvement in the creation of a technical education system that creates opportunities for all within the health and life sciences sector.
- Support the government's ambition set out in *English Apprenticeships: Our 2020 vision* to make sure that apprenticeships are open to all with a 20% increase in BAME apprenticeship starts by 2020⁽⁶⁾.
- Ensure that every young person and adult in the West of England is confident that all career routes are open to them regardless of age, gender, race, disability, sexual orientation, sexual identity or any other factor beyond their control.
- Support the work of a national team of 'I Care Ambassadors' and increase the number of ambassadors across the West of England.
- Utilise national, regional and local campaigns to improve the image of the sector to widen the demographic pool from which workers are found.
- Work closely with NEET providers to increase sector awareness and increase the opportunity to work within the sector, developing clear careers pathways that highlight the importance and relevance of STEM subjects and provide opportunities for young people from all backgrounds.

Regional Centres of Excellence and Research

- University of the West of England (UWE Bristol) - Bristol Robotics Laboratory (BRL)
- University of the West of England (UWE Bristol) - Future Space
- NBT Excellence Centre
- Bath Centre for Healthcare
- Innovation and Improvement
- University of the West of England (UWE Bristol) - Centre for Graduate Entrepreneurship
- University of the West of England (UWE Bristol) - Health Technology Hub

Key Providers

- Bath College
- City of Bristol College
- University of Bath
- Weston College
- University of Bristol
- University of the West of England (UWE Bristol)
- South Gloucestershire and Stroud College
- Babcock
- Ngaged
- BCE
- Interserve
- Learndirect
- T2 Group
- HIT
- Lifetime

Professional Networks and Organisations

- Skills for Care
- North Bristol NHS Trust
- University Hospitals Bristol Trust
- Skills for Health
- NHS Health Education England
- Medilink SW

Endorsed by

Richard Luxton, Health and Life Sciences Sector Chair, West of England LEP

Reference Documents

- 1) West of England LEP Employer Skills Survey, 2016
- 2) UKCES Sector Skills Insights: Health and Social Care, July 2012
- 3) Skills for Care – NMDS-SC briefing – Diversity of the adult social care workforce, Issue 23, September 2014
- 4) Skills for Care – NMDS-SC briefing – Meeting the future workforce challenges of adult social care, Issue 20, March 2013
- 5) NHS Health Education England – How much do you know about Health Careers?
- 6) NHS European Office – Presentation by Michael Wood, West of England AHSN Health and Life Sciences - Matching health with growth: will the NHS seize the €6bn opportunity?
- 7) Skills for Care – NMDS-SC trend briefing – Issue 2 – Recruitment and Retention
- 8) Skills for Care – Adult social care workforce, Recruitment and retention strategy, 2014 – 2017
- 9) The Care Certificate Standards – Skills for Care, Skills for Health, HEE
- 10) Skills for Care – The state of the adult social care sector and workforce in England, 2016
- 11) Skills for Care – NMDS-SC trend briefing 3 – Vacancies, February 2016
- 12) West of England LEP Health and Life Science Sector Group - West of England in the business of healthcare
- 13) Post 16 – Skills Plan, Department for Business Innovation and Skills, July 2016
- 14) The state of the UK's Healthcare Life Sciences sectors – Biotech and Money, February 2016

Employment Areas Chart – NGaged Training / LMI Statement 2017 based on Labour Insights, May 2016 - May 2017 & EMSI

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**WEST OF
ENGLAND**

Combined Authority

The West of England Combined Authority (WECA) covers Bath & North East Somerset, Bristol and South Gloucestershire. WECA also supports the Local Enterprise Partnership, which includes North Somerset.