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THE SKILLS PANORAMA: ACHIEVING NATIONAL AND REGIONAL IMPACT (ARLI)

Demand-Side Analysis Country Report

Country Report **UK**

Principal Author: Andrew Dean

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1. Table of contents

1.	Table of Contents.....	2
2.	ABOUT THIS PROJECT	4
3.	ABOUT THE AUTHORS.....	4
4.	ABOUT LMI.....	4
5.	ABOUT THE UK STAKEHOLDERS.....	5
6.	INTRODUCTION.....	6
6.1	The UK political setting	6
6.2	The UK Labour Market.....	7
7.	DEMAND and SUPPLY of LMI	10
7.1	LMI Infrastructure.....	10
7.2	UKCES/LMI for All/Careers online	11
7.3	UK National Careers website	13
8.	Adequacy and impact of the LMI infrastructure	14
8.1	Awareness of and response to demographic information.....	14
8.2	Current use of LMI	15
8.3	Users’ thoughts on their LMI needs.....	26
8.4	How they use LMI in their work.....	30
8.5	Resources and sharing of LMI.....	39
9.	Current and potential use of the EU Skills Panorama in the UK.....	42
9.1	Prior Experience of the Panorama	42
9.2	Capacity to use the Panorama	42
9.3	Reflection on the potential audience for the Panorama.....	43
9.4	Content.....	43
9.5	Format	44
9.6	LMI that Stakeholders wanted on the site.....	44
10.	Concluding remarks	46
10.1	What LMI the LEP and other stakeholders need.....	46
10.2	Gaps in current LMI usage	47
10.3	Role the Panorama could play for Stakeholders	48
10.4	Barriers to using LMI.....	49
10.5	Potential new uses for LMI	49
10.6	Changes needed to enable better usage of LMI	50
10.7	Potential for sharing more LMI	51
10.8	Other reflections on Stakeholders’ use of LMI.....	51

11. Appendix 1: List of interviewed stakeholders in the Dorset Local Enterprise Partnership 53

12. Appendix 2: List of interviewed stakeholders not part of the Dorset Local Enterprise Partnership..... 53

13. Glossary of Terms 54

Contact: Dr Andrew Dean..... 54

2. About this project

The ARLI project seeks to utilise a system of mutual learning to gather and intelligise good practices from regional and sub-regional experts across the partner countries and to use this to support both the new EU Skills Panorama but also the existing very large number of regional intelligence providers, many of whom are members of the European Network for Regional Labour Market Monitoring (ENRLMM). Innovative policies and practices will be analysed and shared. ARLI has two core objectives:

- The first is to support the implementation of the new EU Skills Panorama by utilising the expertise of both partners and the ENRLMM, interrelating the Panorama with existing skills forecasting provision, achieving greatly enhanced impact and added value for the Panorama.
- The second is to use a good practice approach to explore how existing regional and local provision of skills forecasting can be enhanced for stakeholders through interrelation with the Panorama.

3. About the authors

The University of Exeter is the leading research-led university in the South West peninsular of the UK and was recognised by the prestigious invitation in 2012 to join the Russell Group of research-intensive UK universities. With a turnover of over £200 million, it has 17,500 registered students and over 3,000 staff. In the 2008 UK Research Assessment Exercise (RAE), Exeter had one of the highest proportions of staff returned (95%) with nearly 90% of its research rated as being at internationally recognised levels.

The Marchmont Observatory is a research centre within the University's Research and Knowledge Transfer department and provides research and analysis to support the implementation of employment and skills policies. The aim of the Marchmont Observatory is to improve evidence-based practice and policy in the field of employment and skills. Over the last fifteen years, Marchmont has developed expertise in comparative European research on employment and training-related policy and practice through participation in projects funded via EQUAL, the Lifelong Learning Programme, PROGRESS, 7th Framework and other EU programmes.

4. About LMI

In this project, labour market information and intelligence (LMI) is defined as "analysed, processed, directed, and/or regularly collected information and intelligence about the labour market, which is provided by a source (internal or external) that is not temporary or spontaneous in its provision of the information that the providing organization uses to plan their activities in order to achieve its overall goal."

LMI may account for published or internal reports, databases, industry councils or similar forms of structured meetings, structured networking and a variety of other forms of intervention to generate information and knowledge as defined above; and inform of such things as number of vacancies in one or more parts of the labour market, as well as the type of vacancies it concerns; about general trends in the labour market, or if activities are starting up or closing down within your particular field of analysis; about skills and qualifications that employers are looking for, and the skill levels and

competencies that people have; demographic trends in the labour market, at national, regional or local level; and much more information and analysis which satisfies the above restrictions in the definition.

5. About the UK stakeholders

The Dorset Local Enterprise Partnership was set up to invest in different industry sectors across the county to boost business, create new and more highly-skilled jobs and to ensure the county's infrastructure is in a strong position to promote growth. It is driven by the private sector with local authority support.

The Dorset LEP's overall aim is to deliver growth through business enterprise whilst safeguarding the environment. Its fundamental objective is to improve the performance of existing businesses in Dorset, whilst also encouraging the creation and growth of new ones. It will support a strongly performing, productive and sustainable economy, characterised by boosting higher paid and better skilled jobs. And it will do this in three key ways:

- Enhancing the skills of Dorset's current and future workforce.
- Improving digital and physical connectivity, particularly via high-speed broadband.
- Creating the right conditions for enterprise, driving forward integrated spatial and infrastructure planning across the county, providing more affordable housing, and emphasising the need to be 'open for business', especially in more rural areas.

6. Introduction

The study in the UK has focused, at least in part, on the Bournemouth, Dorset and Poole Local Enterprise Partnership area, although not all interviewees were chosen from this area.

There is no regional infrastructure in the UK and different entities and organisations, even at state level, use different boundaries. The current government has established 'Local Enterprise Partnerships' (LEPs) theoretically based around local economic areas and we have chosen to look in detail at what is available in one of them – the Bournemouth, Dorset and Poole Local Enterprise Partnership (BDP LEP). The area covers the geographical area encompassing a number of Local Authorities:

- Bournemouth Borough Council
- Borough of Poole
- Dorset CC
- Christchurch Borough Council;
- East Dorset District Council;
- North Dorset District Council;
- Purbeck District Council;
- West Dorset District Council; and
- Weymouth and Portland Borough Council.

Around 700,000 people live in Bournemouth, Dorset and Poole. The Bournemouth and Poole conurbation is the main economic hub of the area, containing a diverse mix of services, manufacturing, public sector and tourism-related jobs. Other vital economic centres include Weymouth and Portland, with a mix of industry, port activities, tourism and the hosting of the sailing events of the 2012 Olympics; and Christchurch with an important manufacturing base, the airport and retail.

6.1 The UK political setting

It is important to recognise that the prevalent political philosophy/approach taken by the Coalition Government has been the aggressive marketization of public finance via privatisation, out-sourcing, payment by results, and an engendered procurement culture within government as an alternative to traditional public sector service delivery and partnership working. Accompanying this is a still rather theoretical move to embrace both 'localism' and the potential of the 'big society', the former reflecting the relocation of decision-making powers from regional tiers of government (now abolished) and central government to local government and local delivery models, such as LEPs, which are closer to the market and presumably 'know what is best' for their limited geography. The latter is an increasingly little-used term which embraced the Conservative Party's aim of creating a climate that empowered local people and communities, building a 'big society' that would take power away from politicians and give it to people.

Payment by results is particularly embodied in the relatively new 'Work Programme'. The Work Programme is an attempt to tackle long-term unemployment by enabling expert providers to support

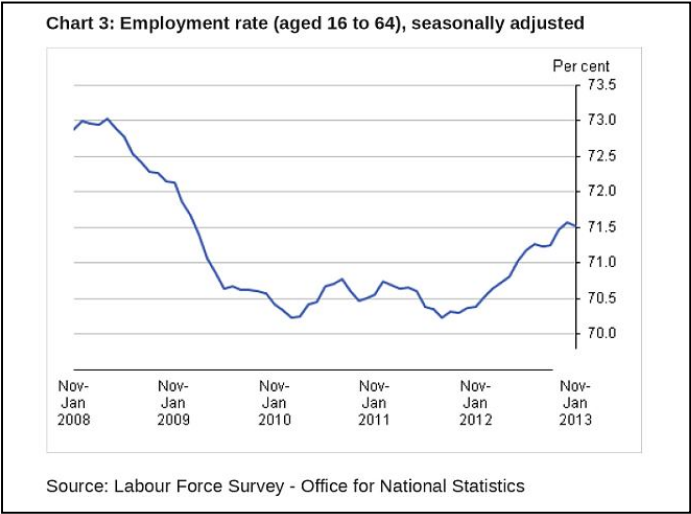
the unemployed back to work using whatever methods and means they feel appropriate. The Government financial reward to the providers is theoretically fiscally neutral with the amount paid to the providers being equivalent to the 'benefits' saved. The Work Programme is discussed in more detail later in this report.

The reduction in public funding has inevitably included Information, Advice and Guidance (IAG) services, which are increasingly being outsourced. A typical example of this is the new LMI for All resource being built to enable better careers guidance in England. Rather than providing a resource for advisors to use, the Government is, instead, making the data available in a format whereby private (and other) users can access, package and use/sell the results on to advisors and their employers.

6.2 The UK Labour Market

Despite the recession/depression, the UK economy has continued to create new jobs; indeed, the total number of people in work across the UK has risen above pre-recession levels and is at an historic high. This, on the face of it, very good news has to be tempered by a recognition that the working age population has also grown, and indeed grown more quickly than employment has, pushing down the national employment rate.

Figure 1. UK Employment rate 2008 - 2013



The Government regards the labour market’s resilience in the face of a weak recovery as a ‘key success story for the UK economy’¹. However, the relative stability in employment has not been shared equally across the age spectrum. Across the UK, the number of people aged 50 and over who have entered the labour market on a part-time basis has risen by 300,000 over the last five years, a dynamic which accounts for roughly 60% of the total rise in part-time working seen nationally. This may be explained, at least in part, by the post World War 2 ‘baby boom’ generation, who would now be expected to be leaving the labour market but are staying in employment, part or full time, due to

1 UKCES 2013, Scaling the Youth Unemployment challenge.
<http://www.ukces.org.uk/assets/ukces/docs/publications/scaling-the-youth-employment-challenge-report.pdf>

reduced retirement incomes and age discrimination legislation enabling them to continue for longer. Over the same five year period, the number of young people in part-time employment declined by 140,000. This decline in part-time working among young people, referred to in the media as the 'Death of the Saturday job'², should be a concern for employers who are already worried about a lack of work-readiness and work experience among young people³.

Across the UK, there were 50,000 more people working in 2012 than there were 2007. Yet, in 2012, GDP was 2.6% lower than it was in 2007⁴. 'Why?' commentators have asked, 'do we have more people working, but producing less?' One of the main reasons is that more people are working part-time. According to the Annual Population Survey, at the national level, the number of part-time workers rose by 512,000 between 2007 and 2012, while the number of full-time workers fell by 475,000. The structure of the economy is changing and the recession and recovery have accelerated this change. While employment has recovered to some extent, the types of opportunities that have come back are different from those that they replaced. Full-time employee jobs are still well below pre-recession levels. Instead, much of the recovery in employment is part-time, temporary or self-employed. The growth in part-time work is partly responsible for one in five young people in work being underemployed, more than any other age group⁵. In addition, young people struggle to become self-employed because they lack the necessary experience, know-how, connections and access to finance⁶.

Business services (*e.g.* accountancy, law, and consultancy) are expected to account for more than one third of total jobs growth in the UK to 2017 with health and social work, retail and hotels/catering also expected to grow significantly. Together, these sectors already account for more than 40% of jobs in England. It is likely that any existing skill shortages and gaps may be exacerbated by such future growth requirements. These forecasts of jobs growth were made prior to the recession and it may well be the case that the volumes of job growth may turn out to be lower than envisaged. It is important, however, not to confuse structural and cyclical trends and to recognise that recoveries from previous recessions have seen employment and the structure of the economy resume previous paths relatively quickly.⁵

CEDEFOP (2011) identifies that the occupations which employ the largest number of people are the three higher-skilled groups of managers/senior officials, professionals and associate professional/technical jobs. Together, they account for 44% of all jobs. It is important to note, too, that most occupations and sectors remain gendered across the UK. UKCES found that, in broad terms, actual expansion in the number of jobs is most likely in the higher-skilled occupations of Managers, professionals and Associate professional/technical occupations. These groups account for 43% of jobs today, and may well account for 47% by 2017 – a growth of nearly 2.2 million new jobs.

The other major growth area looks likely to be Personal service occupations, where more than 400,000 additional jobs may arise. Alternatively, a contraction of jobs is anticipated in

2 See Daily Mail, 12th January 2013, for example <http://www.dailymail.co.uk/news/article-2256140/Death-Saturday-job-Number-teenagers-time-work-slumps-20-decade.html>

3 UKCES 2013, Scaling the Youth Unemployment challenge.

<http://www.ukces.org.uk/assets/ukces/docs/publications/scaling-the-youth-employment-challenge-report.pdf>

4 <http://www.ons.gov.uk/ons/rel/gva/gross-domestic-product--preliminary-estimate/q1-2013/tsd-gdp-preliminary-estimate--q1-2013.html>

5 CEDEFOP Report: VET in England 2011.

Administrative/secretarial, Skilled manual trades and Operative occupational groups. Nonetheless, it is expected that, by 2017, eight million jobs will still exist in the 'bottom' three occupational groups of Sales/customer service, Machine/transport operatives, and Elementary occupations – a quarter of all jobs in the economy. Evidence from the detailed sector studies, conducted by the UK-wide Sector Skills Councils (SSCs), corroborates and supports much of the above.

7. Demand and Supply of LMI

7.1 LMI Infrastructure

In England as elsewhere, LMI has, of course, been used for many years in planning local government and national government policy-making. How it is provided depends on the funding source, which in turn defines how providers are positioned, their structure, and their individual remit or role. Reflecting the heterogeneous funding, the potential functions and focus of providers' activities are very diverse. They may have been set up and maintained within publicly-funded organisations such as government departments, local authorities and the Office for National Statistics (ONS), or, by contrast, supported through external organisations such as universities or private enterprise. As is evident from this mixed picture, the effects of local geographies – or level of spatial analysis under study – will also be treated in various ways, depending on the stated purpose of the provider.

There has never been a sustained attempt either to harmonise models or to create a network of labour market observatories as such with a common function or role. The closest England came to having a network of labour market observatories – according to a predefined geographical model – was following the election of the first Tony Blair Labour Government in 1997. The New Labour administration sought to bolster regional decision-making, leaving each region to decide whether this would go so far as to include a full regional tier of government. As part of this shift, each region received a Regional Development Agency (RDA) and was required to establish a Regional Observatory to drive home the New Labour mantra of 'evidence-based' policy-making. How each region set about doing this was left to each RDA to decide. The result was a network of observatories covering many aspects of policy-making (planning, skills, education, transport, environment, etc.) and with their own network – the Association of Regional Observatories⁶.

Following the abolition of regions by the incumbent Coalition Government, the closure of RDAs followed swiftly and, by default, their regional observatory functions disappeared. There is now no need for regional intelligence, other than for informing national and local policy, and besides, there is no one left to make regional decisions anyway. The RDA replacement has been the LEPs which are located at a variety of geographic levels, some incorporating city regions, some linking theoretical labour markets and some mirroring local government barriers. Some boundaries overlap and central government has been firm in ensuring that it is the local government and its partners in the public, voluntary and especially the private sector that need to make the decisions about how the new LEPs will operate. None has an observatory, and funds are only just starting to flow to these fledgling entities.

Recent surveys confirm that the use of data for evidence purposes is decreasing in UK local authorities⁷, but the importance of local evidence continues: to develop strategies, prioritise expenditure and redesign services to reflect the changing needs of local communities. The ongoing interest in 'what works' is reflected in a new cohort of government-funded research centres for social

⁶ When Internet access was attempted (June 2013), the ARO Website (<http://www.regionalobservatories.org.uk>) shows that it is under revamp and is expected to be re-launched in summer 2013.

⁷ Alliance for Useful Evidence (2013): Squaring the circle: evidence at the local level, May 2013.

policy⁸ (including one for local economic growth) that will focus on gathering, reviewing and disseminating evidence across a range of thematic strands. Other national initiatives to stimulate the provision of data for open access by higher education institutions are also under way. Unfortunately, however, despite the upbeat rhetoric and the stated potential of evidence to bridge gaps between local and central government, at present, data-sharing initiatives are badly underdeveloped and hindering progress on the identification of skills gaps. The potential of universities to work with local authorities to develop evidence-related analytical skills is one way forward; further collaboration in data analysis between central government agencies and local authorities would also be useful to make smarter use of existing data. Budget constraints, however, and the complexities of data analysis have led to attempts to situate data skills within single entities, which have damaged the prospects for collaboration and reduced opportunities to enrich and validate methodologies of choice.

7.2 UKCES/LMI for All/Careers online

Two national repositories of LMI provide standardised access to data down to local authority level: these are the UK Statistics Authority and NOMIS, each of which requires enhanced interpretative skills. Other than these, the UK Commission for Employment & Skills (UKCES) has a national remit to support and promote workplace learning, helping individuals and businesses to make better and more informed decisions about careers and learning options. One of its key functions is to bring together existing data sources, including key national surveys, to make high-quality LMI more accessible – and it therefore operates as a *de facto* LMI observatory.

An important part of UKCES's mission to drive vocational training provision has involved the establishment of 22 business-led Sector Skills Councils, or SSCs, to represent the learning needs of employers in their industry sectors. SSCs' understanding of the key role of LMI is to provide the *evidence* that informs decision-making and action planning. SSCs consider that there are three major components of Labour Market Information:

- Economic and labour force information (e.g. numbers in employment/unemployment across industries/sectors, salary information).
- Occupational information (e.g. descriptions of occupations and job roles).
- Demographics (e.g. age, gender, ethnicity, location of general population in relation to employment).

The term 'LMI' may also refer to Labour Market Intelligence, which for SSCs is 'the interpretation and analysis of the Labour Market Information to enhance its practical application to skills issues'. To succeed, a specialist LMI function should enable the delivery of the following:

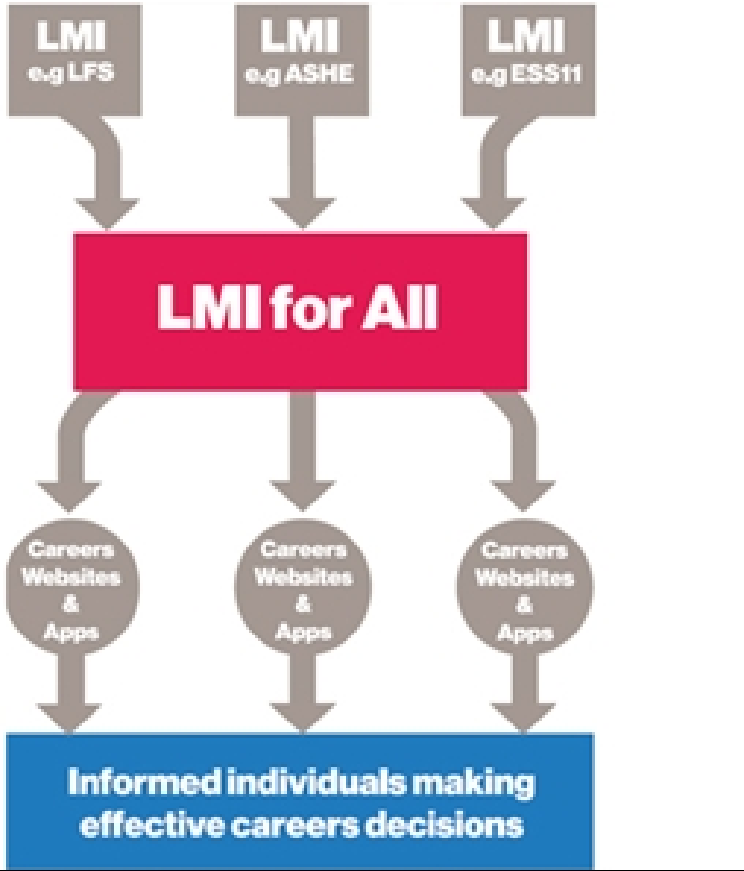
- Past, present and future skills drivers.
- Predict current and future skills requirement, both temporally and spatially.
- Development of options for change.
- Influence policy-makers.
- Broker skills solutions.
- Assess and evaluate the effectiveness of its interventions.

⁸ UK Cabinet Office (2013): What Works: evidence centres for social policy, HM Government, March 2013.

To improve networking and develop a common platform for data-sharing, UKCES set up an Alliance of Sector Skills Councils, which, in 2009, began to develop a Common Framework for LMI⁹ to highlight key cross-sector issues, linked to a Continuing Professional Development (CPD) programme for SSC researchers. The Framework provides terms of reference for the main LMI outputs that SSCs are required to produce; the minimum requirements of SSCs in terms of their lead role in collecting, analysing and communicating sectoral LMI to employers, individuals and policy-makers; and a definition of what constitutes good practice in SSC LMI.

Following the development of the Framework and subsequent feasibility work to explore development of a robust and comprehensive repository of LMI, UKCES is now creating a fully functional data tool for the open market. The LMI for All is an ‘open source’ implementation which supports the wider government agenda to encourage the use and re-use of government data sets. It will bring together existing data sources and make it easier for developers to access and use the data to develop applications and websites that present LMI in an engaging way, shaped to specific audiences. The data tool will include LMI that can answer the common questions people ask when thinking about their careers, such as ‘what do people get paid?’, and ‘what type of person does that job?’ allowing people to make comparisons across different jobs. This function is also included under the National Careers Web portal below.

The LMI for all Model



Source: UKCES Website

⁹ UK Commission for Employment and Skills (UKCES) (2009): Information to Intelligence: A common LMI framework, UKCES.

7.3 UK National Careers website¹⁰

A glance at the new UK National Careers Service Web portal shows how even centralised information on job prospects can still miss out on underpinning LMI. The Careers Service is set up to provide a 'one-stop shop' for those seeking employment, and contains much information on job hunting, employability, funding advice, industry sector profiles, occupational skills, trends forecasting, salary levels, and availability of local training courses. What it does not offer consistently, however, is national, regional and local LMI. The data available depends on existing analyses conducted by individual SSCs on their own behalf, are rarely disaggregated below regional level and are likely to be based on historic information. By contrast, the Careers Wales Website – which has been in existence for over ten years – provides up-to-date details of jobs all over Wales, including the possibility of direct application online through the site.

¹⁰ UK National Careers Service. <https://nationalcareersservice.direct.gov.uk/Pages/Home.aspx>.

8. Adequacy and impact of the LMI infrastructure

This section includes the evidence obtained from 13 interviews carried out in the Dorset LEP and with other organisations from the South West of England (mainly Devon). Details of the organisations can be found in Appendices 1 and 2.

The interviews looked at the LMI that was used by the various organisations, how they used it and what they needed – that they could and could not find. It found a wide variety of usage with some surprising results.

8.1 Awareness of and response to demographic information

The three policy-focused organisations (UKCES, the LEP and Dorset CC) all take a keen interest in demographic change data and intelligence, and all do this very much with an eye on the external world – rather than looking at internal practices and procedures. The changing demographic is key to understanding their own roles in terms of forecasting and matching supply with demand. The LEP have commissioned a number of reports from the University of Exeter (Marchmont Observatory) looking at the future for employment and skills in the LEP area. The Local Authority use this data a great deal in planning for education, housing, social services and to reinforce the work of the economic development team. It is incorporated in regular reporting throughout the County Council.

The four guidance and employment-oriented organisations: Jobcentre Plus (JCP); JobShop UK (a recruitment agency); the independent Careers Guidance Professional; and the school age careers service in Exeter College, also recognised the importance of understanding the changing demographic. As with Exeter College, Strode College use demographic information to inform the course profile (i.e. what they are likely to deliver) and resource planning (i.e. what resources are needed to support the profile) for 16-18 provision. This includes information about the number of children at local, feeder schools in different age groups and the general age structure of the population within the District and the County. They normally have 1,500 to 1,600 students in the 16-18 age group and the demographics and relationships with feeder schools and proclivity for staying in Further Education (FE) and other destinations is a really important science. However, as with Exeter College, it is little used elsewhere in planning. In JCP, the new flexibilities in the retirement age have had a major internal impact in extending people's working age with staff not being forced out at 60/65 – this is resulting in staff being able to remain longer in post, typically reducing their hours as part of a managed retirement. Externally, it means that more people are looking for opportunities later in life – exacerbated by the reduction in pension income in the UK.

JobShop UK are impressively aware of the demographic problems facing the labour market in their particular location, based on detailed knowledge of the local labour market and intelligence from national bodies.

The independent Careers Guidance Professional understood national changes in demographic but was more concerned about changes in government policy, particularly, changes in government policy about education institutions' duty to provide careers advice.

The CITB are acutely aware of demographic change, largely due to their intensive use of LMI over many years. The crucial aspect is the lack of people coming through in new and even established trades. The response has been to try and broaden the base for finding new recruits via a focus on diversity, notably encouraging girls/women and minority groups into the industry. By contrast, Greendale Construction, a medium-sized building contractor, are not preparing for this but does keep a watching brief on national trends.

For Care South, a large care sector employer, demographic change helps drive their business plan. They are aware of where the concentrations of care homes are and where it is easy to find young people and people in the correct socio-economic groups to employ.

Exeter Council for Voluntary Services (Exeter CVS) have in the past taken part in large projects concerned with active ageing and opportunities for older people. More recently, they have moved to supporting younger people who have suffered most in the current crisis, and as part of this, have used internships for graduates needing to build employability skills. The South West Trades Union Congress (SW TUC) are aware of the changing demographic in their area but their focus tends to be on the shorter term so they keep an eye on trends but it does not drive strategy.

8.2 Current use of LMI

Sources of LMI

Unsurprisingly, UKCES, as the key provider of intelligence for the employment and skills sector (working under contract to the Department for Business, Innovation and Skills (BIS)) is well aware of all available LMI. UKCES inform UK policy at the national level and below. They not only monitor and report on other data and LMI but are responsible for three key elements of LMI nationally:

- UK Employment and Skills Survey;
- Employer perspectives survey;
- Working Futures (forecasting model for the UK).

They work in partnership with other specialist analytical organisations such as OECD, CEDEFOP and LLAKES to carry out LMI-driven research and evaluations into established and emerging areas. They provide studies to target employers (and to a lesser extent individuals) and are looking more and more to influence employers to invest in their staff and to influence the investment behaviour of individuals (re: their training and careers). UKCES is building a new resource – LMI for All. This will provide critical LMI for careers decision-making and carers, providers and others may use the API to re-structure the existing data and LMI to provide the level of detail and information they require. UKCES also works specifically with UK SSCs.

The Dorset LEP are actively using LMI to build strategies and plan for the future use of resources. This usage will probably decrease over time. As a partnership body, they utilise the expertise of economic development officers in the partner local authorities. They also use the new reports commissioned from the University of Exeter (Marchmont Observatory) which present employment and skills forecasts (a Local Economic Assessment) and sector analysis of nine key sectors for the LEP. Marchmont also produced a dashboard of key indicators. They regularly look at a variety of websites

(Marchmont, SLIM, ONS, South West Observatory, NOMIS) and are now able to evidence change and prepare for it.

Dorset County Council (Dorset CC) use most available datasets at the national and sub-national levels for strategic planning purposes. Economic Development is a particular focus for their use of LMI and, typically, concerned with employment, unemployment, skills and 'businesses'. They use LMI for a wide variety of reasons from policy formation to responding to queries from elected officials and staff.

For JCP, the critical data source is their own claimant count data which gives details of the numbers of people unemployed and their skills, occupations, abilities etc. Normally they look at data broken down to local authority area. It includes details on types of claimant as well as which employers are recruiting. Within the system, employers enter their own searches (after limited initial training) and individual clients can put CVs online and state what they are looking for. The data includes sector intelligence. Their own system is called 'Universal Job Match'. Claimants also enter data into the system on their skills and attributes. Employers can be supported once only to enter data and searches – after that it is up to them to do it. The system is run by Monster (a private company) and replaced the vacancy data that was used by many other organisations.

JobShop UK get their intelligence from a number of routes:

- Word of mouth from clients
- Feedback from meetings
- The REC (Recruitment and Employment Federation) sector body
- Meetings with other similar providers and specialist sector groups.

They get very little from mainstream LMI resources, but do get a monthly briefing/update from REC – the monthly job report, which they seem to like and to which many recruitment agencies contribute data – in exchange for data being made available to them. They sense that most of the data and intelligence they need is rather 'bitty' and not joined up, which could be a role for the LEP. They contact most of their clients (30-40 on average) every month to see what they are doing and then share the information at weekly and monthly team meetings and at sales meetings every two weeks. They also get a lot from events and speakers in theirs and other sectors, rather than relying on data from JCP/ONS/NOMIS etc.

The independent Careers Guidance Professional runs his own independent company providing careers information, advice and guidance to young people of education age in schools and FE. He is hired by schools directly to see their students and help them make informed careers decisions. This starts at Year 9 (13/14 years old) and goes up to Year 13 (17/18 years). Some schools hire him only to see students who have a 'problem' deciding what to do next while others hire him to see the entire cohort (sometimes only in groups). FE colleges will have a duty/responsibility for careers advice from September 2013. However, they often employ their own people to deliver it which brings into question the impartiality of their advice (especially school sixth forms). If a student leaves the college, it loses funding for that individual. Impartiality of the previous careers service has been lost. Websites he consults are:

<http://www.swslim.org.uk/labourmarket/>

<http://www.somersetintelligence.org.uk>

<http://ons.gov.uk/ons/regional-statistics/region.htm?region=south+West#tab-sum-pub>
<http://gradsouthwest.com/>
<http://www.bestcourse4me.com/explore/?Tab=Career>
<http://www.careersworld.co.uk/south-west/careers-training>
<http://www2.warwick.ac.uk/fac/soc/ier/ngrf/lmifuturetrends/sectorscovered>
<http://www.lmiforall.org.uk>

He also attends a number of events and recognises that, for 13-18 year olds, parents are an important audience as they have a powerful influence on the careers perceptions and destinations of their children.

Within Exeter College's 16-18 year old provision, they have similar perceptions to the independent Careers Guidance Professional but look far more at their own systems and intelligence. The College faculties and especially the student recruitment officers liaise with business and have a good appreciation of available employment opportunities. The faculties often signpost to other organisations such as careers services and the national careers service website. There is an East Devon guidance group to which they belong and from which they get intelligence, and JCP also contributes intelligence. Careers SW (a large carers guidance private sector body) attends their main events (enrolment etc) and they do refer some people to them – but only NEETS (young people Not in Education, Employment or Training) and potential NEETS (and some other categories) qualify for financial support to do this for free; the rest have to pay.

The CITB is the Industry Training Board for the Construction sector. It is the industry voice for training in construction. The interviewee is the lead person for the South West of England whose role is to promote careers in construction and to lobby for better/enhanced/relevant skills training throughout the industry, with training providers, with policy-makers and decision-takers. They use a five-year rolling model with Experian (private company) which is updated annually. Each January, the new report is produced and two to three times a year the results are presented to crucial industry and other bodies – making the relevant case for construction. The data is both nationally available datasets and those designed by Experian from information within the industry. The other chief source is via direct interaction with major developments and employers. The CITB also utilise focus groups, telephone interviews and literature research to underpin the forecasting activities they do.

Established in Poole, Dorset in 1990, Greendale Construction Limited is a client-focused Chartered Building Company. They are very project oriented, responding to opportunities as and when in a very flexible way. Consequently, they have a core staff and many subcontractors. They use very little external LMI other than intelligence from their extensive networking locally; this results in a two-fold understanding of the labour market:

- Understanding the labour market in respect of recruitment – most of which they outsource if it is difficult to appoint/source.
- Planning ahead and strategy when LMI is bound-up in sectoral thinking.

They have little idea about the local labour market's vacancies, skills gaps and skills shortages but do actively engage with the major training providers in a very positive way. They have internal data and intelligence on their staff and who has what accreditation and whether people need to get re-

accredited or whether new responses to legislation are needed. They have a company training plan and link actively with key sector bodies. The Chief Executive sits on the UK Government Construction Board.

Care South provide care services via care homes and domiciliary care across much of the south and west of England. They have 16 residential homes, four nursing homes and two 'close care' homes. Their perception is that most sectoral LMI data is incorrect or inaccurate as it is often combined with health sector data and geographies are insufficiently local. Consequently, they tend to use their own LMI data and intelligence from within the sector and from the National Minimum Data Set for Social Care (NMDS-SC). The NMDS-SC seeks data on an individual employee's national insurance number (NINO), post code, gender, ethnic group, date of birth and any disability they may have, together with some specific questions on their job role, pay and training amongst other things. They have to enter every course done by every staff person plus all changes to staff circumstances. This is an enormous task and is not necessarily done well by all providers.

Unfortunately, Care South feel it is not really maintained as it should be, so the data is often out of date and always shows fewer in employment than is really the case because there is always a need for recruitment. Local authorities also have data and intelligence that Care South can use but the categories tend to be too small to be useful.

Strode College is a traditional tertiary college and caters for people aged 16 plus and delivers a full range of adult provision. Geographically, it covers the Mendip district area. Within business development, LMI is used to look at employment and unemployment trends as they help unemployed people into work. There are two useful sources of LMI:

- The set of data that JCP produces. Strode College meet with JCP every quarter to review how the two organisations are doing. They give to them breakdowns of job claimants by ward, age groups, volume and nature of vacancies coming through and this is important for planning.
- The Somerset Information website (SINE) is a good resource that they can trawl through for data. That is useful because it gives an overview of what is happening elsewhere and how the College is performing compared with others.

For SW TUC, the principal source of LMI is the central policy team. This is refined qualitative intelligence and is produced to support campaigns and initiatives crucial to the TUC. Policy officers look at data and then pass intelligence to the regional teams. Rarely do they analyse data at a regional level. The intelligence they use covers everything related to the world of work.

Exeter CVS is a local infrastructure organisation supporting the voluntary and community sector in the Exeter area. They provide information, advice, updates and low-cost training to help improve the effectiveness of voluntary and community-based organisations. They use the Government (Department for Work and Pensions (DWP)) data and intelligence reports which come out monthly. They are members of the Devon Worklessness Forum which provides insight and intelligence (qualitative) on local and sub-regional developments. They modify DWP data to be more appropriate to their needs. They also get JCP data when available and data from multi-agency briefings and meetings at the sub-regional level. Further data and intelligence comes from the Local Authority.

Decision-making and strategic planning

For UKCES, existing datasets, perhaps supported by bespoke research and evaluations using a network of commissioned partners, form the best practice approach to decision-making. For the LEP, the Marchmont-commissioned work has given them an evidence base for their activities supported by intelligence from their partners. The LEP is looking at a 10 year plan focus and they tend to use the same LMI for short-term decision-making.

The Local Authority have purchased a forecasting system (Cambridge Econometric Model). However they rarely use forecasting below district council level (60,000 – 100,000 people normally – comment Author). They use the national datasets available from the Office for National Statistics (ONS)/NOMIS frequently and they do not tend to generate their own data nor do they have local surveys. They use the same LMI for short-term planning as they do for long-term forecasting.

There was recognition from JCP that longer term planning tends to occur either at the strategic national level and in partnership with organisations like UKCES or more locally when considering very major developments like Hinckley (a replacement nuclear power station) where JCP take a partnership approach and work with local authorities, LEPs and the employer. More significant to the work of almost all JCP staff is the use of LMI for decision-making with regard to targeting claimants at opportunities and vacancies. The far smaller JobShop UK watch for major trends to inform strategy and planning but are typically very reactive with few strategies lasting two years. As for JCP, it is decision-making that the LMI comes in most useful for and it is REC data and personal contacts with employers, clients, meetings with the chamber of commerce and sector meetings and events that drives this. Staff even drive around looking for new developments and businesses opening up.

The independent Careers Guidance Professional, rather like JobShop UK, depends on membership of sector and expert bodies for much of his external LMI to inform strategy. The bulk of his work is decision-making driven and most of this is short-term feedback from schools that he has contacted.

At Exeter College, they look longer term and demography is critical to long-term planning – as is an awareness of what courses are popular and what will be needed in the local economy. In terms of decision-making, this is very much based on either internal responses to internal intelligence or a response to an outside stimulus such as a new development or staff meeting employers and bringing back new intelligence – as for the smaller careers and employment focused organisations.

When it comes to planning and strategy, CITB tend to use the Experian Tool they commissioned. This includes information on primarily the demand side – new homes, major developments, data on skills gaps and skills mismatches. They look at two key things: Output and Employment, linking the two to identify potential gaps. With shorter-term decision-making, CITB also use the Experian material plus other information via projects and direct contact with developers/local government and construction companies. Their research team can help with specific requests.

Greendale Construction do not tend to use LMI for short-term decision-making, basing this on what they know about the labour market from the projects they are engaged in, whereas longer term strategy and planning is based more on qualitative intelligence from the sector combined with what else they know from their active involvement locally and sectorally. If they need to recruit quickly, they

may use a consultant/agency and if they need intelligence or data they would go to an external contractor straight away.

For longer-term planning, Care South tend to refer to the NMDS-SC and combine this with other sectoral intelligence, quite possibly from the SSC. They keep a particular eye on demographic intelligence, monitoring for where the ageing population is concentrated. Care South also use the National Care Forum which represents the interests of not-for-profit health and social care providers in the United Kingdom. It is useful for data on staff turnover, pay rates, qualifications etc. By contrast, short-term decision-making is usually based on internal data bolstered perhaps by JCP data. The short-term issue is usually recruitment. The staff they require need to be literate, numerate, physically fit and confident to deal with medication, plus they need to pass police and safety checks. Despite this, pay rates are often low and the sector suffers from a negative perception. Consequently, attracting staff is an issue and they do not tend to use JCP, preferring word-of-mouth, and online via regional and local newspaper websites. They cannot afford to use large advertising campaigns.

Strode College utilise JCP data for planning the training of the unemployed within their Work Programme/JCP contracts. It is less used for the business development strategy aspects of the College. Membership of external boards and groups is useful for gaining understanding about the labour market and new trends and developments. LMI can also play a role in major bids for funding. For general intelligence about the state of the economy and sectoral trends the interviewee reads the Financial Times, Royal Bank of Scotland weekly newsletter, Bank of England newsletter and accountants' newsletters to build the picture. For shorter-term decision-making, they tend to rely on the same resources perhaps with bespoke work for major developments.

The strategic and planning LMI used within Exeter CVS tends to be responsive to government policy and is qualitative rather than quantitative. Staff also receive interpretation and qualitative reporting from the National Council for Voluntary Organisations (NCVO), who do a quarterly survey of the sector. NCVO also produce an annual Almanac of the sector mapping changes and direction. By contrast, decision-making tends to be particularly opportunistic and driven largely by the potential for projects and new opportunities. This can come from a variety of sources and partners and may require bespoke analysis for which they have staff able to do analysis or they can get this done by partners.

SW TUC do not tend to use much LMI for strategy and planning as they are very much the voice of the TUC in the region and follow national strategy. Decision-making can be supported by LMI, normally from the central team.

LMI in the short and long term

All of the policy-oriented government organisations (UKCES, LEP and Dorset CC) focus very much on the use of LMI in long-term planning and decision-making. In UKCES, almost all of their work is concerned with longer term planning – including the forecasting, surveys and sector work. They use all available LMI and have a large team in place to analyse and manage commissioned work. They do not do 'micro-planning'. They see their role as enabling others to make decisions. They will not 'forecast the need for more people in a given occupation and seek to engineer a response to this' anymore.

Leaving all of these changes to the free market to decide - “the market will decide what is provided, micro-management is too complicated to do”.

For the Local Authority (Dorset CC), the main emphasis is on long-term strategic planning for the county and the planning process can cast as far ahead as 2031.

Of the four guidance/careers-oriented organisations, only the large College focus mainly on the longer term through LMI, and they also have a lot of short-term priorities as they seek to place Apprentices and other VET students. By contrast, at JCP almost their only use of LMI for is for short-term planning – with a little of the longer-term associated with major developments such as new shopping centres or business relocations. This is very similar to JobShop UK who also keep an eye on major industry developments and in particular the capacity for IT developments to impact on their industry. The short-term emphasis is reinforced by the Independent Careers Guidance Professional who cites the volatility in the current labour market for much of the failure to use LMI for longer-term planning.

CITB do look as far as five years ahead but often their focus is fairly short term, being more typically one to two years. When it comes to lobbying for new training facilities and major developments, this can lead them to look more long term as is the case when making the case for careers in construction when they use longer-term trends. Greendale’s use of LMI is very much for the longer term when considering strategy and planning future directions, which is typically annual. The major employer, Care South, use LMI for both long-term and short-term planning.

As with Exeter College, Strode College uses LMI more for long-term decisions, ones that might need resources and might change the direction of the organisation.

Exeter CVS try to combine their long and short-term planning into five and three-year strategic and operational plans based on what they know from policy and long-term structural and political trends. In terms of short-term usages, this is often in association with specific projects and new opportunities and can involve sectoral or labour market data – typically from the Government (ONS, DWP, BIS or UKCES).

Almost everything SW TUC does is considered ‘short-term’ by the terms of our study. With respect to LMI, this will be via briefings, reports, newsletters and campaigns.

Generation of LMI

Of UKCES, the LEP and Dorset CC, only the County Council do not generate their own LMI. In UKCES, this is part of their role and they generate and commission large amounts of LMI in response to political direction and perceived need, whilst in the LEP, they have commissioned a number of reports to identify the evidence base for what is a relatively new geography. Dorset CC do package what LMI they find to be useful and make this available via e-zines to a wide audience.

For the four careers guidance-oriented organisations, developing and using their own LMI is absolutely critical. In JCP, the LMI they generate is the LMI they use. The Universal Job Match system generates lots of LMI on who is looking for work and what vacancies exist. The LMI can in some forms be accessed by all from their website. There are eight Zone Managers in the sub-region:

2 – Somerset
2 - Cornwall
4 - Devon

Each Zone Manager has their own LMI systems and each will have weekly ‘buzz meetings’ and ‘whiteboards’ in the offices to let people know what is happening and who is recruiting. One or two also do newsletters for external partners, although this is at their own discretion.

At JobShop UK, staff generate their own LMI which they maintain and use for internal planning and they share across the organisation via a CRM (Customer Relationship manager IT system) and meetings. They share certain data with REC and via their newsletter with clients and businesses. In the one-person Careers Guidance organisation, clearly the LMI drives everyday activity.

Similarly, at the College, the internal team looks at LMI generated and shared to identify issues and feed into policy. Advisors use their own data. They do look at destination data but could probably do a lot more with the intelligence they get. They are intending to generate some case studies on what young people leaving the College have gone on to do. They have a Management Information System (MIS), with staff to analyse it, that they use for internal decision-making.

All three employers and employer representatives (CITB, Greendale and Care South) generate their own LMI but they use it in different ways. CITB analyse LMI centrally and send LMI to the Experian tool. They have a research team centrally who can support forecasting and planning. They also carry out work with local authorities, employers and supply-side organisations (training providers) to get a better picture of what is happening in the sector. Employers are used to confirm what the LMI is saying.

Greendale, though far from heavy users of LMI, especially in the short-term, supply LMI to the Government quarterly as part of a number of national surveys, including the Business Register Employer Survey (BRES), the Contracts and New Orders survey and the EU Company Business Strategy. This is reported on but not used in any other way. Care South also report on LMI to the Government through the NMDS-SC. They also supply LMI to their SSC. They do consider their own data when engaging in planning and strategy formation.

Strode College analyse a lot of their own internal data to help with strategy and planning. Their internal systems are simple but not particularly technologically-driven.

Exeter CVS do not produce their own LMI. They are looking to establish a small ‘observatory’ for the voluntary sector in Devon. This would have a data analysis and qualitative intelligence function. It would be a hub for accessing intelligence in the sub-region. They would survey 3,500–4,000 members annually.

SW TUC do generate their own LMI which they provide to their member unions and regional teams (and unionlearn). They deliver national contracts for which they have to provide information and data to the government.

What do users currently feel is missing?

UKCES find themselves regularly filling gaps within the available data and intelligence. If data is not available, they consider commissioning additional LMI research and analysis. They also look for international research from partners such as OECD and CEDEFOP. They use partners to 'ground the work' within enlightened communities. Nonetheless, UKCES feel that the data they need is typically available for the geographies and levels of planning they require.

By contrast, the LEP would like to drill down more often to the local level but this can be difficult as the data may not be sufficiently robust. The more localised the data, the better for the LEP (whose focus is, after all, 'local'). Sometimes they cannot get bespoke data for new geographies – such as the new LEP boundaries. The LEP also feel that sometimes the timing of data is not ideal, with too much being released annually. Sometimes they have to buy, typically where government data fails to fulfill the task needed, such as the current problem in the UK with adequate vacancy data. They are looking at systems to mine vacancy data from websites/recruitment agencies.

The Local Authority also recognise some geographical limitations. Sometimes they cannot get bespoke data for new geographies, such as the new LEP boundaries. There can be limitations with the data, particularly at below district council levels or with sectors such as Agriculture, where employability statistics are not perfect. Surprisingly, they do not have an internal system for capturing 'intelligence' from staff as they report things; they do, though, have regular internal discussions and meetings which fulfil much of this role.

The big issue for JCP is that they only have data and intelligence on that part of the labour market that uses them – around 35-40% of job vacancies. The problem is: "what don't we know?". They only have sectoral data for large geographies – which is not locally robust.

JobShop UK have recognised a lack of supply-side intelligence as a potential obstacle. They understand the demand side and work well with employers – but they do not have robust intelligence from training providers and the College about numbers of people achieving certain key occupation-level qualifications at either Higher or Further Education Institutions (HEI or FEI). They could also make use of more local statistics from JCP and others concerning what jobs are in demand in their sub-region.

The current government initiative to raise the education leaving age has resulted in a need for more intelligence in training opportunities, according to the independent Careers Guidance Professional. More information on vacancies locally and applicants per place would be useful.

At Exeter College's 16-18 years service, they need two types of LMI:

- For those young people doing 16-18 academic qualifications, they need intelligence on what degrees and other higher qualifications are needed for what careers. This is certainly national LMI and should include information on rates of pay, availability, careers prospects etc.
- For those taking vocational and Apprenticeship qualifications, intelligence on emerging skills and new jobs in the area would be very useful, combined with more local intelligence.

CITB cite the lack of intelligence and data on the supply side as a concern. They need to know who is providing how many trained people with what skills/occupations. This has always been problematic.

They understand the demand side much better but have little influence over the supply side other than through projects where they can react to major developments and through lobbying for new courses by making the case with LMI. They wanted more LMI on skills forecasting, particularly when associated with major developments, so they have developed a new flow-tool which will forecast when certain skills/occupations will be needed to allow better strategic planning.

Greendale Construction would like more local information on the labour market and, in particular, more on the supply of skills.

Care South would like to find a way of filtering JCP and other available data to identify potential employees who fit the geographic and skills/personality traits they need.

Strode College do not perceive a big gap in provision of LMI, although some can often be out-of-date. They would like more information about new businesses starting in their area.

Exeter CVS need a detailed narrative behind the figures as they often use them in bidding and project delivery/design. The sources they use do not tend to add much value to the reports they provide. This is needed for a more nuanced understanding of their sector and the local employment market – their main focus.

SW TUC identified a great many things they would like intelligence on to help with their activities and campaigns such as:

- more in-depth local pay data (pay is a really critical part of their work);
- more local GDP;
- nuanced gender and living wage intelligence;
- job numbers – ILO measures preferred but the benefits claimant count is preferred by some media (unfortunately).

Regional data is now increasingly hard to obtain.

Expert Reflection

In terms of the LMI experts in UKCES, it would be hard to criticise their commitment and use of LMI. It may be they could make slightly better internal use of LMI in partnership with other government agencies. LMI for All will be worth monitoring when it is launched and their research and analytical reports are consistently excellent. The political desire driving UKCES developments and, in particular, the desire not to plan or guide but just to make data available and to leave everything else to the free market, is more open to question. This is particularly so as training in the workplace continues to decline in the UK, even though greater responsibility has already been given to employers and the 'demand side'. Similarly, advice and guidance is very weak compared with international comparators and recent changes have only worsened things. There seems little appetite amongst employers and individuals to start spending the kinds of amount necessary on LMI advice to generate the level of service that government seems to expect.

The LEP are making good use of available data and intelligence. The use of partnerships with economic development departments makes sense and they have commissioned a series of reports, enabling them to understand their new geography and to prioritise and plan accordingly. If data for the new geography remains problematic, it may make sense in the future to commission a regular survey and to make more use of Dorset's new forecasting model.

The Local Authority (Dorset CC) is using the best available data and intelligence. They are also using a well-known forecasting model and have not committed to any very small/bespoke datasets preferring large established ones. Problems with current Government-related systems (vacancy data) have to be negotiated and this may result in the use of external data systems.

At JCP, their internal LMI system is crucial to the responsive nature of almost all of their work. It could be that the system of engaging with external organisations to let them know what skills are needed is as robust as it can be. They would benefit from seeing what others are doing, e.g. agencies and external bodies – and a tool for mining vacancy data from other websites would be a benefit. They are very dependent on internal LMI and seeing others' would help confirm what they are thinking, especially the bigger picture and sectoral material, which is not robust locally.

Most of what Jobshop UK knows about the labour market comes from first-hand contacts either with other experts/recruitment agencies/clients/news/chambers of commerce etc or from the REC returns. They would benefit from knowing more about:

- the supply side – what skills will be available and where;
- the demand side – who is recruiting for what and where? - so they can build their customer base.

The independent Careers Guidance Professional's use of LMI seems appropriate given the nature of his work. The emphasis is mainly on supporting young people in accessing the education and training opportunities they need to embark on their chosen careers. This means he needs to use a combination of occupational information (entry requirements, salaries, nature of work, availability to employment geographically) with information about FE and HE courses and apprenticeship and other training opportunities. Given the rural nature of Somerset, it is good that travel and transport are also considered.

Exeter College's 16-18 team need to look in a strategic way at demand and compare their supply with this. Destination data also needs more attention as it could help build the offer to young people and adults about why they should go there. They are not careers advisors and it is a shame they can no longer afford internal careers advisors to meet regularly with business and students to help inform young people's career and education decisions.

CITB are already making extensive use of LMI for lobbying and making the case for construction training and new sectors/occupations. The LMI they are using – especially with regard to the Experian work and new forecasting tools - are pretty much what they need to map the demand side. In fact, they are better at this than any other SSC. They use extensive local information and have specialists gathering LMI on the ground and making the case for the necessary training in the areas and sectors in which it is needed. The big issue is probably a lack of consistent supply-side data to map the demand

side, so they get a better idea of who has which skills in what areas and who will be emerging from which colleges with what occupations.

Greendale Construction would probably benefit from making better use of the LMI they gather and provide to others. They rely on intelligence from the industry bodies such as the CITB combined with a fine working knowledge of the Construction sector in their area.

Care South would benefit from a better understanding of the skills of employees within other occupation groups. They make very good use of internal LMI and are aware of what else exists at the local level that could be of use to them. This is interesting and may be good practice. They must know the market very well or they find that they cannot recruit. Ideally, though, they should be looking more at JCP data and seeking means of recruiting from the JCP cohort and possibly from new sources of labour.

Whilst Strode College seem to be using demographic information well to plan for 16-18 provision, the use of LMI to plan provision for unemployed adults appears to be mainly supply-side in orientation – for example, numbers of unemployed and location. The interviewee used mainly ad-hoc, qualitative information about employer needs (i.e. demand side). This was obtained informally through extensive networking and may not even constitute LMI in any formal sense but was hugely important in terms of advance warning of new businesses moving to the area or expansions. ‘Real-time’ intelligence is far more significant than routinely gathered information from surveys or administrative sources. They are very locally focused mainly because unemployed adults want to work locally but some broader context and horizon-scanning may be helpful in enhancing provision.

Exeter CVS use a variety of LMI, notably DWP evidence, and they make good use of the intelligence networks of which they are a part. They would benefit from some more support with data analysis – and are moving this way via a small observatory for the sector in Devon and through working with ourselves. This is a good idea though some similar (Voluntary Sector) structures exist at the regional level. A variety of excellent employability-themed LMI reports and analysis done by INCLUSION and others in this sector already exist. They, like many others, would benefit from local employment data/intelligence but will need a survey to be able to get this from their sector, and the likelihood of local data from the private companies delivering the Work programme is slight.

SW TUC are well served by their central team in London but would benefit from regular regional breakdowns of data such as pay, hours worked, qualifications etc plus general regional and local LMI to help their role in the South West.

8.3 Users’ thoughts on their LMI needs

What organisations require from LMI

For the UKCES, they need LMI to be able to influence policy. The major strategic driver is currently the “employer ownership of skills” which is a competitive fund open to employers to invest in their current and future workforces in England. Employers are invited to develop proposals that raise skills, create jobs, and drive enterprise and economic growth. Government will invest in projects in which

employers are also prepared to commit their own funds in order to make better use of combined resources. Ultimately, the Government seeks employer ownership of the skills system and its strategic planning.

The LEP are rightly using LMI to boost their understanding of the context of the labour market to enable strategic planning. The primary driver being economic development and economic growth. In particular, they have identified three main sectors: Care, Advanced Manufacturing and Creative (digital). The first always needs new staff and the second two can be grown. They are using Bristol (UK) as a model for these sectors. The two HEIs in the area are also strong in these two sectors.

Dorset CC seek to use LMI to gain an understanding of the context of the labour market to enable strategic planning. They use an enormous amount of LMI across the various departments - demographic, economy, vacancy, education, planning, housing, skills, health, society, commuting distances/transport, tourism and environment etc. They are also a resource for the district councils and work with the neighbouring unitary councils. Interestingly, they also use it for building/creating bids as UK local government is often able to bid for money and programmes and needs to argue its case against competing local authorities. They produce an annual State of Dorset Report for internal policymaking and use by Council staff. It is not available to external bodies.

JCP need LMI to help them achieve local solutions for often very local labour markets. Solutions are client focused – so they need genuine local information on what is available and what is coming in order to plan their provision of training. Essentially, they need to match demand with supply, so robust data on jobseekers and employers is needed. Similarly, JobShop UK need to know which businesses they should be talking to in order to place their people. They tend to react to employers, rather than seek certain types of person in advance of likely opportunities. This matching of supply to demand is also the case for the independent Careers Guidance Professional and the College, though the latter has a longer-term view and tries to take into account what the labour market will be demanding in a few years time.

CITB need LMI essentially to identify gaps. They use it to establish an evidence base on future skills across the Construction sector. This takes the form of a high level overview of where the construction industry is expected to be in the short term (one to three years), medium term (three to five years) and long term (five to ten years), and the resulting generic skills and training needs. The evidence base is to be enlightened by current construction industry views, utilised to underpin future research requirements and inform strategic thinking.

Greendale Construction need LMI to combine with local information on the labour market and sectoral information for long-term planning and strategy.

Care South need LMI almost exclusively to aid recruitment and future planning. They also need it to keep an eye on what training and qualifications are available in the workforce and the potential labour force.

Strode College need LMI that enables them to plan the delivery of their curriculum whilst Exeter CVS want to boost their understanding of the local labour market and discover more on the supply side

(training providers etc). Exeter CVS also need more data on their own sector and what it is providing. This is also useful to make the case for their sector – to evidence their added value.

The SW TUC need evidence on which to base its campaigns both nationally and locally. This can be all kinds of data but typically relates to pay, employment conditions and equalities issues.

Types of decision and solution

Internally, the UKCES do not make much use of LMI for planning their own HR strategies. Externally, however, it is the focus for what they do. For the year ahead, and working across the UK, UKCES's three strategic objectives are to:

- provide outstanding labour market intelligence which helps businesses and people make the best choices for them;
- work with businesses to develop the best market solutions which leverage greater investment in skills;
- maximise the impact of employment and skills policies and employer behaviour to support jobs and growth and secure an internationally competitive skills base.

UKCES also seek to enable the labour market to work more effectively by making high-quality LMI available to the market place. Clearly, from a strategic point of view they are seeking to help the supply and demand sides meet by empowering the demand side (as the Government is also doing this – via leveraging funding to employers).

The LEP needs LMI for decisions concerning the use of European funding and skills/adult training. The LMI will also be used in bids to gather new projects and resources. The LEP will need to make its case to the Government for support. An emphasis will be the use of training and skills priorities and encouraging growth and economic development. Following the recent government review, they may have a major role in commissioning but, for now, they work in partnerships with agreed strategies. The local colleges and universities are already becoming more responsive to the needs of the LEP.

Dorset CC need LMI for all decisions covering demography, economy, vacancies, education, planning, housing, skills, health, society, commuting distances/transport, tourism and environment etc. Ultimately the LMI is for 'making the case' to enable priorities to be identified and the 'case' to be made for funding – providing the resource for the work and the accurate direction of the service provision.

The kinds of solution required by JCP, JobShop UK and the independent Careers Guidance Professional are all very similar and quite short term. They stress the placement of people into training or work based on short-term decisions rather than longer-term planning. JCP have a lot of flexibility to provide really quite bespoke provision for out-of-work people. They have them for up to nine months/12 months and can design training, employment support, volunteering etc, all aimed at getting them back to work. There is some real innovation in what they offer as solutions – especially for boosting generic skills and confidence. They are necessarily reactive. Within the College, there is greater use of LMI for the longer-term planning of courses.

The kinds of decision for which CITB use LMI include targeting and prioritisation. Furthermore, CITB rely on LMI to be able to make an accurate case for construction as a career. They use the LMI to be able to argue for the skills that are needed within specific sub-sectors and local areas, to colleges, employers and government. By contrast, the solutions CITB are looking at are client based:

- Informing people on what areas/careers to follow.
- Lobbying for certain training courses in certain areas.

They look to recognise where there are under-used skills and would seek, therefore, to retrain people into skills shortage occupations. They also help the Government to get the unemployed back to work via training and re-training. The Green Trades are another good example of where they can use LMI to identify genuine industry need and lobby to get providers to put on courses in these areas.

The decisions for which Greendale Construction and Care South require LMI are very much around long-term planning and strategy. By contrast, the solutions are more concerned with recruitment and what skills and occupations will be needed in the future in the sector.

The kinds of decision Strode College make with LMI are concerned with capital planning, buildings, 16-18 academic and VET provision, and adult education and VET provision. The solutions they seek to employ are concerned with being responsive to labour market need.

Exeter CVS are seeking to make decisions and solutions concerning longer-term strategy and what they offer and to whom. On a shorter timescale, they need intelligence for bidding and for new projects and tenders, of which the UK economy has a great many, especially as the public sector outsources and seeks not to deliver but, increasingly, to 'procure'. Like Strode College, they too are seeking to make a 'responsive' offer.

At SW TUC, decision-making and solutions tend to be wrapped up in new campaigns and activities so they typically get the LMI they require from the central team for this.

Other influences

All of the three policy-oriented bodies recognised politics as one of their main other influences. This is unsurprising given the relentless change in government in the UK (and Scotland, Wales and N Ireland). The LEP and the Local Authority also recognised the impact of funding opportunities as critical along with the need to respond to new initiatives. They also saw the impact of their Board (LEP) and elected members (Dorset CC) as important. The Local Authority also noted the need to respond to environmental challenges and resident consultations.

As with the policy-oriented bodies, all of the careers guidance organisations cited 'response to policy from government' as a major influence, particularly when linked to funding. At JCP, the new Work Programme means they only have clients for a certain time. This made JCP provide a clearer offer. Jobshop UK also cited the role that new technological developments plays (Linked In etc) and the impact of demography and major industrial developments. The Careers Guidance Professional also cited the importance of liaising with other careers professionals or people working within particular occupation/industry sectors as crucial.

The skills field is always changing and policy influences what CITB will do – but not to the same extent as LMI. Similarly, changing roles and responsibilities as to who leads on driving the demand for certain skills or lobbying with supply-side. A further key driver is large-scale infrastructure projects which can lead to major changes in what is needed locally. Employer’s perceptions are very important. The changes to the law in the UK make it now possible to link training and recruitment on major developments to locally sourced staff and companies.

The four areas identified by Greendale Construction are: funding, planning, legislation, and economy. Care South also identified legislation and funding, but critical for them is the availability of workers with the required skills.

As well as LMI, Strode College are driven by budgets and opportunities (e.g. bidding rounds and demand (what your customers tell you)).

Exeter CVS cited other key drivers and influencers as:

- their values as a social justice organisation;
- their members’ needs;
- the impact of local policy and strategy;
- national policy from government;
- money – availability of funding.

The SW TUC, like Exeter CVS, have to respond to the needs of their members – the other unions in the region. Policy is also critical, both from government and from the central policy team identifying what to focus on.

8.4 How they use LMI in their work

History of usage

Dorset CC has used LMI for a very long time and has had dedicated staff looking at it to guide service provision for many years.

The UKCES is a Non-Departmental Public Body (NDPB) that provides advice on skills and employment policy to the UK Government and the Devolved Administrations. Created on 1 April 2008, as a key recommendation of the 2006 Leitch Review of Skills, the UK Commission supersedes the former Sector Skills Development Agency and the National Employment Panel. It had been registered as a company since 13 November 2007. It survived the 2010 Cabinet Office Review of Public Bodies, also known as the ‘bonfire of the quangos’, and was given the green light on 24 February 2011 to continue as a NDPB. It has had the same role in supplying LMI for policy since inception.

The Employment and Skills Board (ESB), in many ways a pre-cursor to the LEP has been around for three years and the LEP for one. They are now commissioning bespoke LEP reports and are becoming less aspirational and more operational. The key LMI has been commissioned.

Both organisationally and personally, all of the careers guidance-oriented organisations and individuals have a history of using LMI in their work. The use of systems is more varied with the larger organisations, especially JCP, being much more familiar with having their own major LMI resource. At the College, the Apprenticeships team are a good example of where they go seeking information from business. They need to compete for young people so must make a good case for going there.

CITB have a very long history of usage of LMI as an industry training board and a role in driving change in the supply side (training providers). It is experienced in:

- Promoting the industry.
- Planning.
- Supporting regional and local government (and national).
- Prioritising new and emerging areas.

Greendale Construction is more project focused rather than heavy users of LMI. By contrast Care South are skilled and heavy users of LMI, typically for recruitment.

Strode College have a strong history of LMI usage in 16-18 support, exploring achievements and destinations to aid their positioning in national and regional league tables. They do not need the data they needed five years ago as the market has retrenched.

Exeter CVS has used LMI in some form since its inception but has become much more developed and formalised recently through the leadership of a new Chief Executive. Previously what LMI they used was largely looking at their own sector; now it is more public-facing. They are more policy and intelligence-driven now.

The SW TUC is a campaigning organisation and its existence is grounded in the need to evidence problems and issues so that they can be highlighted and addressed appropriately.

Impact types

The impact sought by UKCES is very large scale (see below).

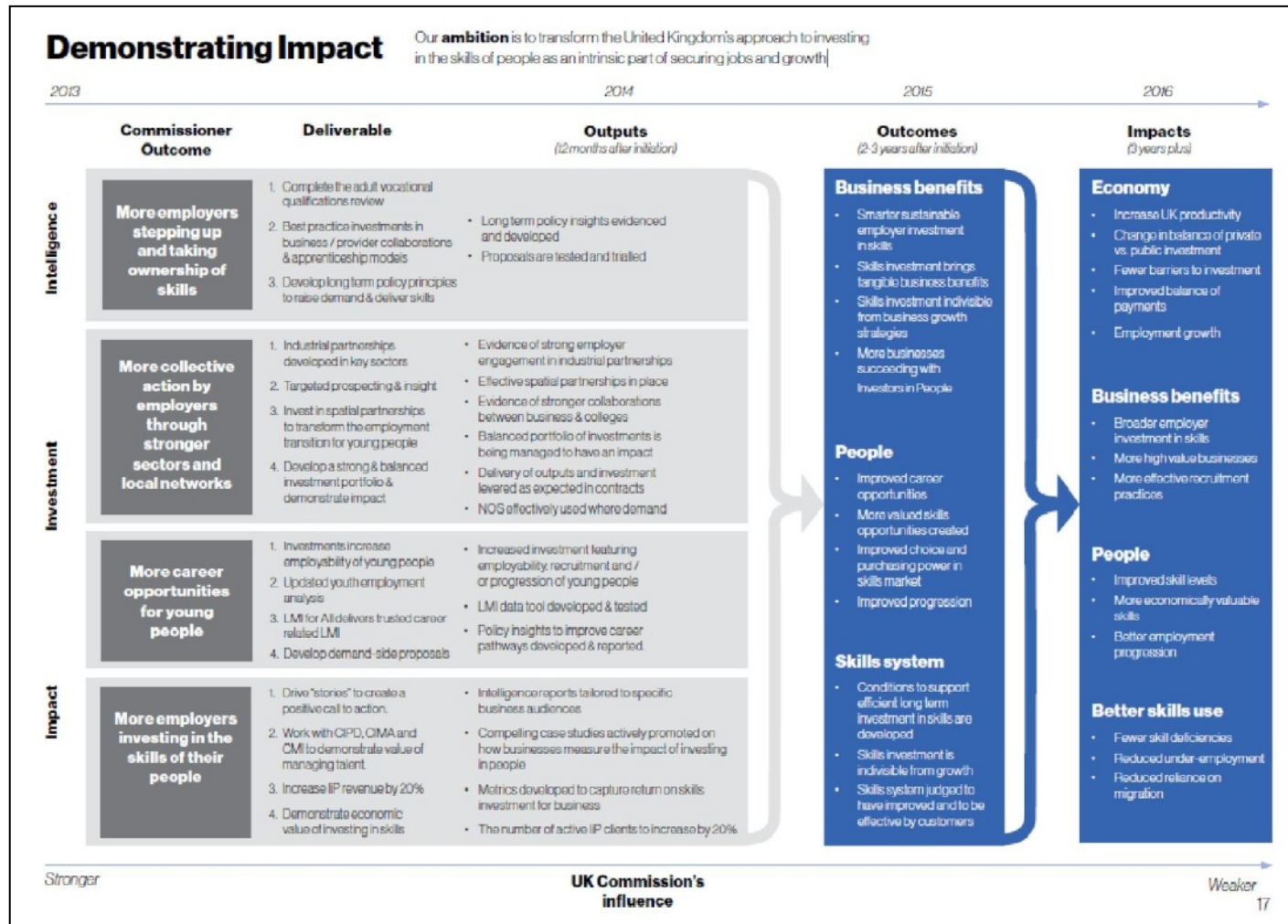


Figure 2: UKCES Impact Graphic

The LEP and Dorset CC are seeking large-scale changes and, through them, seeking to influence provision and people's lives. They are also looking to attract new money through programmes, projects and bids. For both, service provision can hopefully be more locally relevant where appropriate.

All of the guidance-oriented organisations are very concerned with one major form of impact – placing individuals into work and supporting both individuals and businesses accordingly. The larger organisations also recognise a role in boosting local employment and skills.

CITB are looking to influence training providers to lay on courses as well as employers to provide training. They provide LMI to support individuals making career decisions. Some lobbying is very high level and strategic. Care South are concerned with demography and the need for care homes in certain areas whilst the short-term LMI need is for recruitment purposes.

Strode College are looking for both large and small-scale changes so they seek to change policy and strategy to respond to changes in policy whilst also being responsive to shifting employer needs. This is similar to the SW TUC who need LMI centrally for planning campaigns but also are required to make short-term responses to new issues and needs. SW TUC also seek to use LMI to influence partners' agendas and needs.

Within Exeter CVS, everyday work is more concerned with short-term impacts on people's lives. The LMI is to enhance the support their network (and they) give directly to help individuals in the community. Essentially, everything they do is themed on personal development.

Long and short-term impacts

All three policy oriented bodies are looking very much at using LMI for long-term impacts primarily with some exceptions for the LEP and Dorset CC where intelligence is needed for quick decisions and informing new developments.

The impacts sought by the careers guidance organisations are typically short term - finding employment for people. Inevitably you could argue the consequences are 'longer term' as businesses need staff for the longer term and a job has major implications for someone out of work – but the driving force for what they do is short term. By contrast, the College's use of LMI can be more longer term, though in respect of helping advise their 16-18 cohort, it is shorter; this is the same for Strode College..

Greendale Construction are only really concerned with LMI for long-term strategy and planning, whereas Care South are far more concerned with LMI for recruitment and short-term impacts. At CITB, most of the lobbying fits more into the short term rather than long term as it is fairly applied – often around new developments. However, they do also provide LMI and intelligence seeking to influence longer term planning in government and local government.

The impacts sought by the SW TUC are both long and short-term. The long-term aims of driving up pay, employment rights and equality are supported by LMI centrally but most of the day-to-day activity is around campaigning and responding to unions' and members' needs.

At Exeter, CVS much of what they do has short-term benefits and is all about getting individuals work-ready and trained. In terms of their overall strategy, the impact of LMI is longer term, especially in defining what they will deliver and to whom, and that is dependent on changes in government.

Data versus qualitative intelligence

For both UKCES and the LEP, their use of LMI varies between data and qualitative intelligence. UKCES recognise that data can be very labour intensive – especially the surveys they do which can have 90,000 respondents. In these instances, they will define the requirements and procure the service. They themselves can then analyse and re-purpose the data when required. UKCES also work in partnership with others to synthesise findings from other surveys – such as the National Strategic Skills Audit 2010. In terms of how they work, they will commission an external supplier, refine the results, and then test/review the findings with external experts who can also shape the process.

The LEP recently commissioned reports from the Marchmont Observatory which were largely qualitative and they have relied on others doing the analysis for them. However, they are able to do the analysis themselves and may do more in the future, resources permitting. If swift action is needed, they have often used external intelligence to confirm the position and acted upon those findings.

The Local Authority prefer to use mainly data either from national datasets or from their own use of the Cambridge Econometrics - Local Economic Forecasting Model, supplemented by other intelligence to provide context. They also purchase a database of businesses. They feel that their use of qualitative intelligence depends on what is current and available e.g. the Friday Update from the SW Observatory and the SLIM (Marchmont) Newsletters.

Both JCP and the Independent Careers Guidance Professional prefer to use that data, the former as this is the way the organisation operates, and the latter through personal preference. JobShop UK and the 16-18 years service at Exeter College prefer qualitative, using internal quantitative data for planning.

CITB use a lot of data but their regional field operatives rely on this being transformed into qualitative intelligence. CITB do use data and quantitative intelligence from available surveys and even generate the tool themselves. They have just designed a new Labour Forecasting Tool which is a 'Flow' tool to be used with big infrastructure projects to identify what occupations are needed and when. CITB only look at qualitative data, even though they supply quantitative to the Government. By direct contrast, Care South much prefer to look at the data themselves with some qualitative sectoral intelligence.

Strode College are interested in LMI as 'insight' rather than 'information' and this guides their partnership-oriented strategy where they seek to engage with the demand side (employers) and other key partners. They believe that "talking to people with insight into the market is far more important than data" and that networking removes some of the need for hard data.

Exeter CVS make very little use of data, preferring intelligence. They often place their own interpretation on the reports and intelligence they receive before circulating them to members. The new observatory will have the capacity to analyse and interpret data, building their capacity and provision.

The TUC do a lot of analysis when required and work with partners on analysis and the turning of data into intelligence. In their day to day activities, the SW TUC office team tends only to use intelligence and do not do their own data analysis.

Evaluation of LMI usage

All three policy-oriented organisations do indeed evaluate their use of LMI – though typically within a broader examination of their activities. UKCES capture evidence of impacts of their work through an impact log. Where they have proven influence, this is reported to government on a quarterly basis and is an interesting practice.

At the LEP, reports will be evaluated regularly and there will be an overarching strategic evaluation and it will be critical to evidence where decisions came from.

Within Dorset CC, evaluation of LMI is included within evaluations that take place into local government efficiency and effectiveness where the ability to evidence decision-making is important. On a smaller scale, it is monitored as evidence in committee reports coordinated by the corporate evidence group and they have their own guidelines.

None of the four careers guidance organisations evaluates their use of LMI directly, though the larger organisations link it to analysis of their overall systems and as part of performance monitoring.

None of the ‘employers’ group (CITB, Greendale Construction and Care South) evaluates their use of LMI, though for CITB, Experian do look at how accurate their forecasts were and act upon the results. Also the local experts will pose questions of the data, a role done by the Marchmont Observatory (indirectly as its Assistant Director chairs the regional group). SW TUC also do not evaluate how they use intelligence and data.

Strode College do not tend to evaluate how they use LMI, preferring to look at the larger picture of how successful they are in delivery and meeting employer needs. Exeter CVS look at how successful they have been in projects and programmes but do not include a specific element for evaluating LMI.

Types of LMI they use, broad or focused?

All three policy-oriented organisations use a mix of broad and specific LMI. For UKCES, broad spans are used for surveys and forecasts but they then focus on specific areas via research reports. They have a comprehensive view of all and do drill to particular sectors. They used to be mainly sector-focused but the emergence of LEPs has given them a spatial element too. At the LEP, the focus is more broad than specific with nine sectors identified as crucial and the three ‘key’ sectors they wish to expand on receiving additional attention. Dorset CC, as for the LEP, do look more at broad datasets. They focus when necessary but their usage includes pretty much all available datasets and areas needed for planning in a large geographic area.

Inevitably, the LMI used by JCP is very broad as is that used by all of the guidance organisations. For both the College 16-18 years service and the independent Careers Guidance Professional, the LMI is mainly about informing and challenging young people’s perceptions of the nature of specific occupations and the probability of finding work in these areas.

All three of the employer organisations relied on very sector-focused LMI with an emphasis on skills and occupations.

Strode College and the SW TUC inevitably both use quite a broad range of data and intelligence. The former has a geographic limitation (Mendip area) whilst the latter looks more at employment data. Much of what Exeter CVS look at is specifically looking at the voluntary sector. But they also use a lot of data on the unemployed and the labour market for the unemployed and underemployed (and volunteering).

Occupations or skills?

Both Dorset CC and UKCES emphasise a need for both. UKCES recognise a tension between the occupation and skills approaches to data. Their Working Futures forecasting looks at occupations and where there may be growth but does not demonstrate skills mismatches and skills shortages. Skills mismatches are a focus for interventions where they are recognised. At Dorset CC, the LMI used covers both occupations and skills, but the policy tends to look more at skills, probably as a result of the demand-focused national policy. By contrast, at the LEP, occupation data tends to be more of a LEP focus and skills more of an ESB (sub-LEP organisation) focus. The emphasis is shaped by the need for the ESB to look at driving up workforce skills whilst the LEP is more about attracting new jobs and industry to the area.

With the exception of the College 16-18 years service team, who prefer to talk about qualifications, the other three careers guidance-oriented organisations tend to look initially at occupations, then to link in skills as the means of obtaining the occupation desired. Interestingly, one or two of the guidance-oriented organisations tended to see more senior roles in terms of occupations and more junior roles in terms of skills.

The construction industry bodies (Greendale Construction and CITB) both prefer LMI with a focus on occupations. Care South, however, also use LMI with a skills focus and staff are expected to have a mix of skills. For instance, managers are expected to be skilled in advertising, management, communications and finance.

Strode College examine both skills and occupation intelligence and both are important to them. Exeter CVS are far more focused on skills than occupations, reflecting their role in getting people back into employment. SW TUC look at both occupational and skills LMI, the latter is a clear focus for their unionlearn activities.

Distinguishing supply-side and demand-side effects

UKCES very much look at both and seek to evidence issues in the mismatch of supply and demand. UKCES recognise that, though some problems are supply side driven – such as skills shortages – most issues derive from weaknesses in demand. The LEP looks at both and needs a good understanding of both but recognises a need to explore the demand side more which is more challenging for the data and intelligence. In the County Council, both demand and supply data feed into their projections and they look at both. They use the economic forecasting model to derive demand-side data.

All of the careers guidance-oriented services seek to match demand with supply to some extent and all make good use of the levels of demand data they get. The supply data for some is typically internal and they often lack figures and intelligence on the wider availability of skills and occupations.

CITB tend to concentrate on the demand side but use what supply-side intelligence they can gather. Greendale Construction prefer to use solely the supply of labour. Care South do both, looking at their own demand for staff in a lot of detail plus a look at the available labour market – though based on experience mixed with their own data.

Strode College have their own supply-side intelligence and tend to rely on word-of-mouth rather than LMI for the demand-side planning. Neither Exeter CVS nor SW TUC tend to do analysis which could lead to firm conclusions regarding demand and supply.

Role of the LMI – internal or external?

For UKCES, the LEP and Dorset CC, the emphasis is on the external world and about it changing the organisational view of the world so it can respond accordingly. Internally, LMI is, of course, used by the senior management teams.

In JCP, the LMI is for influencing the way they go about their business and the way they target people to vacancies. It does, though, influence the strategic approach taken by JCP and the offer they make to clients and employers. In JobShop UK, they are very dependent on LMI and knowledge of the labour market – so they change their organisational view as they gather intelligence. The independent Careers Guidance Professional recognises that the LMI is mainly about informing and challenging young people's perceptions of the nature of specific occupations and the probability of finding work in these areas.

At CITB, the LMI is used to prioritise the areas on which to focus for the organisation. It is critical, therefore, in establishing what they do and what they seek to achieve. It does this by establishing a view of the world and how it is changing. They then design an organisational response to this taking on board inevitable changes in the short term (new developments etc).

Greendale Construction and Care South use LMI in different ways. In Greendale, it is to help understand where they sit in relation to the world outside, whilst at Care South, they use LMI to drive internal decision-making on recruitment and activity.

At Strode College, the role of the LMI is to influence its direction of travel. At Exeter CVS, the LMI is for use within the organisation. The LMI drives what they deliver as an organisation and what their offer is to their sector, and the kinds of project and training they deliver and to whom. The move to more flexible employment nationally has led to them setting up a team of associates rather than employed staff.

In the SW TUC, the LMI they use is there to support its relationship with the external world and to help support the campaigns that it runs.

Dissemination

UKCES have a pivotal role in disseminating their LMI which is used by almost all organisations engaging in LMI-derived forecasting and planning. This is done typically through reports, online databases, and published materials. They also do presentations to key partners (education, local government, employers etc) of the major pieces they commission. They also use new media/social media and video clips.

The LEP circulate LMI to their members and Board – notably the reports and plans from the Marchmont Observatory. They are careful not to send LMI that is too detailed, preferring, for instance, to send the ‘Dashboard’ to less expert users.

Dorset CC produce an e-zine where they extract data and provide a user-friendly focus. They also provide it when needed by internal and partner bodies.

Of the four careers guidance-oriented services, only the College did not disseminate the LMI they gather, other than through local meetings and discussions and with one or two government agencies. JCP do circulate LMI via their website, which can be rather challenging to use, and in some cases via newsletters produced at local discretion for key partners. JobShop UK disseminate to clients and businesses, often repackaging other intelligence plus some of their own information via newsletters. They also have a big Linked In presence and use Blogs and Facebook and Twitter, both to learn and to promote activity. Interestingly, the independent Careers Guidance Professional produces their own publication which combines LMI and careers information aimed at schools and parents.

Greendale Construction and Care South both share LMI with the Government and with sector organisations (particularly Care South) but nowhere else. However, CITB have a more sectoral role representing the Construction industry and they are very eager to share LMI and design LMI derived intelligence for policymakers and people looking to move into careers in construction. They also actively use LMI to promote new areas of growth, such as green skills.

Strode College selectively share intelligence and insight though it is often sanitised for different audiences. Exeter CVS do not share much data but do feed intelligence received to their networks. SW TUC share a great deal of their intelligence with their member unions and other partners in their various campaigns. They do not tend to share data.

Understanding or planning?

For UKCES, understanding is key. The planning of their own strategy will follow – but mainly in terms of planning their reaction to changes in the labour market. Both the LEP and Dorset CC stress the importance of both. JCP, JobShop UK and the independent Careers Guidance Professional stress understanding as the critical element and, in particular, to understand the local labour market. At CITB, understanding is also key, hence the importance of good local knowledge and interaction with employers, whereas at Greendale Construction, they are far more concerned with using it for planning and strategy. Care South seek to understand the labour market in some detail to aid recruitment which is a perpetual struggle.

For Strode College, the LMI is really for strategy and planning and aiding their understanding of the labour market. For SW TUC, it is to inform and provide an evidence base, then to help to support their day-to-day campaigns and activities.

At Exeter CVS, it is both. They review things annually to change strategy if needs be but most usage is responsive to changes in the world around them and understanding what their role could be.

Geographical impact

UKCES look at the whole UK and they include devolved administrations in Scotland, Northern Ireland and Wales. Some material is produced at regional geographies for comparative purposes or where it cannot be used at a lower geography.

By contrast, the Dorset CC and LEP priorities are local and sub-regional. For the LEP, this is Dorset and its neighbours within the LEP area. They benchmark to other LEPs in the area but emphasis will always be relatively local. At the Local Authority (Dorset CC) they look at Dorset and its constituent Districts/and localities. They actively use other geographies for comparators. They are members of CLIP, a body that links LMI experts in large authorities, and this negotiates nationally with ONS and government.

The careers guidance organisations stressed the importance of local geographies in all but guidance for degrees and higher-level occupations linked to qualifications.

CITB has a national focus, so LMI is analysed first nationally then regionally and down as far as LEPs (sub-regional) and large cities. Their new tool will help with more localised developments.

In LMI terms, Greendale Construction and Care South are concerned almost exclusively with local impact – the former as this is their area of business, and the latter, as they focus LMI on recruitment and staff are always recruited locally.

Both Strode College and Exeter CVS seek to achieve quite local impacts. SW TUC are a regional organisation but their campaigns are often national so the LMI is often nationally sourced. SW TUC seek regional impacts, but inevitably they work with individual employers and engagement can be very locally driven.

8.5 Resources and sharing of LMI

Internal capacity

UKCES have a major research team of 25 people. Each has involvement but not all are full time equivalents. Nonetheless this is a significant resource for the UK, particularly given the levels of out-sourcing and external studies they manage/contract.

At the LEP, there is effectively one full-time person. However, they do have access to other analysts and experts within partner organisations such as Dorset CC where there are three people with responsibility centrally for LMI but others make use of it – and there are around four people (so seven in total) with skills in

using LMI for analysis and supporting planning and strategic development – most based within teams in other parts of the Council. They actively collaborate.

‘The larger the organisation, the greater the potential to do analysis’ is the case within the careers guidance-oriented organisations, although as an exception, the independent Careers Guidance Professional is an LMI expert and makes tremendous use of it. Both JCP and the College have skilled central teams analysing intelligence and data and circulating it.

At CITB, they have several staff within the national research team plus the expert consultants at Experian, to aid LMI analysis. Greendale Construction could do analysis when necessary but prefer a more project-focused route. Care South have two staff entering data on the system that government requires from them, plus they have staff in management who can analyse and understand LMI.

Strode College has a marketing department who focus on the data around 16-18 years education. But they have no specific team responsible for LMI; instead it is far more about acquiring business intelligence – rather like Greendale Construction Company.

The SW TUC have staff centrally for looking at LMI rather than regionally and they rely on the central team for intelligence and analysis. Some of their affiliated unions also have analysts they can use to support campaigns and programmes.

Sharing of LMI

UKCES do not share from their own organisation other than to central government. This is the same for Dorset CC. The LEP is not of a size for there to be much benefit in sharing internal LMI. However, all clearly do share LMI that they obtain and use in their work.

All of the careers guidance expert organisations and services share LMI. The larger ones tend to share it with government and other policy organisations as well as some locally with key partners. The relationship between Jobshop UK and REC, their sector organisation, is interesting as they share LMI (upwards) benefiting from the intelligence that this helps gather on the sector when combined with intelligence from other REC members. SW TUC and Exeter CVS share a lot of what they receive with partners, national organisations and affiliates, in a similar way to the careers guidance expert organisations.

There is little sharing of LMI from the three ‘employer’ businesses other than as data to government. CITB do share data with UKCES but there is probably scope to do far more. Strode College choose not to share LMI, citing commercial intelligence and sensitive information issues.

Use of external experts

Both UKCES and the LEP make excellent use of external expertise, commissioning reports when needed. For the LEP, this includes the University of Exeter’s Marchmont Observatory. At UKCES, they prefer to use external providers for large-scale analysis and have networks of experts they also use and prefer a partnership approach with external experts guiding and ensuring the correct approach. The resource for this work at the County Council is far less and they have a lot of internal expertise in the datasets needed for their

work. They only tend to commission when they have enough resource or when it is a specialist area they cannot cover.

At JCP, they typically do their own analysis although the LMI system is run by the private company, Monster. JobShop UK, as well as linking to REC, link to TEAM which is a local group of similar agencies on a less formal basis than with REC.

All three of the 'employer' businesses have made use of external analysis in the past. CITB have a relationship with Experian which is ongoing whereas Greendale Construction appoints experts when necessary and Care South have tried to internalise their analytical and LMI needs. It is finance and frequency of use that has driven the divergence of approach from Greendale and Care South. For the former, it is an occasional resource that they have sufficient capital to purchase whereas for Care South, their need was ongoing and it made financial sense to save money in consultant fees and to hire their own employee.

Strode College do not use external LMI experts and the SW TUC stick to their central team apart from on projects which may involve others. Exeter CVS do use external experts to analyse LMI but only when associated with projects and programmes, not as a matter of course. They do use LMI from elsewhere, such as the Marchmont Observatory, when they need it.

9. Current and potential use of the EU Skills Panorama in the UK

9.1 Prior Experience of the Panorama

UKCES were the only interviewees to have heard of the Panorama.

Initial thoughts

UKCES felt that it was well organised. The menus on the left worked well and produced the findings expected. However, the sources for the data were not consistent across countries so it was difficult to use the tables, hence the way the site looks. UKCES were expecting more use of EUROSTAT data for consistency of findings across borders as it is more comparable. It could be useful for international benchmarking, but this could be time-consuming and expensive to produce and would be largely qualitative. The analytical highlights was considered a good idea as were the forthcoming data sections.

The LEP felt the site was internationally focused whereas the LEP needs very local level data and that more context would be appreciated.

Dorset CC and Strode College welcomed its arrival and were pleased it was there as a resource. Some of the reports there were definitely interesting. The graduate information was very useful. For them, though, the geographic level was probably too high to be useful. They need local data and intelligence. They tend to use national datasets and do the analysis themselves.

JCP had real problems using the Panorama as it did not support their (old) version of internet browser. When they could access the site (using another browser), they felt the data was rather broad brush for them. For the careers guidance-oriented organisations, they would have liked to have seen more occupation-level data and were not sure about how easy it was to compare different countries' data.

Greendale Construction saw no real value to the site for them and would not be using it. CITB, even though they are a major employer representative organisation, did not believe the site would be useful for them. They do not really need to look at comparator data from across the EU and really wanted to get straight to UK data and intelligence only.

Care South and Exeter CVS much preferred to use local LMI and although they found the Panorama interesting, they did not intend to use it. They also complained that the occupational groupings for care were not appropriate and included too many other very different occupations. SW TUC did not feel it could be a resource for them to use in their work but that the central team may make use of it for informing campaigns.

9.2 Capacity to use the Panorama

All of the policy-oriented organisations found using the site very easy as did the careers-oriented organisations, although they felt the language was sometimes a little technical. JCP had issues with an out-of-date browser.

In theory all of the employer groups could use the Panorama but there were concerns about technological language and the absence of introductory information about how and why it should be used, focused on certain user groups. This was also the case for Strode College, SW TUC and Exeter CVS.

9.3 Reflection on the potential audience for the Panorama

UKCES felt the Panorama had been built with a policymaking audience with international and EU perspectives in mind. This audience could be quite large. The UK is less interested in international benchmarking (historically) than are many other countries. The LEP felt the site was more concerned with evidence for EU bidding and for European-level organisations. Dorset CC thought MEPs and people making bids to EU and other programmes would make good use of it but that it was not for the general population. It was more for a policy audience and researchers who did not need detailed local data.

The careers guidance organisations and services were split between believing it had a focus on careers advisors and high-level policy and strategy people. They also felt it would be useful for some sectoral bodies.

CITB, Strode College and Care South all felt the Panorama was aimed at policymakers needing to be able to compare different international positions along with researchers and the Commission. Exeter CVS recognised its usefulness in bidding and working at a European level on projects and programmes and hoped their sector would be well represented in qualitative studies.

The SW TUC noted the potential for EU-level organisations to use the Panorama but also recognised the importance of comparing labour markets for the social partners.

9.4 Content

UKCES felt the content was relatively as expected apart from the lack of a Eurostat data portal. This was not a 'bad thing' as it was currently easier to use than Eurostat's portal. It gave a good quick start to exploring a particular theme or topic and the repository of reports was good and skills information was accessible. It was faster to use than Eurostat although it had less potential to drill down.

The LEP would prefer to use reports and intelligence rather than data – so the lack of Eurostat data was fine. However, it would need to be much more local to be really useful.

Dorset CC wanted a guide for using the site to help explain its purpose along with a chance for expert users to get straight to the datasets.

JCP felt that there was a lot of interesting content but that it was not relevant to the day-to-day work of the JCP offices, being more to do with national-level planning. The independent Careers Guidance Expert wanted more information on comparative analysis.

Both CITB and Care South felt there was a need for regional LMI or at least links to where it could be found.

Strode College were not particularly attracted to the content which, though interesting, was not really key to their short or long-term planning.

Both Exeter CVS and the SW TUC, in their capacities as representative and, to an extent, campaigning organisations, recognised that the content could be useful if it allowed easy cross-border comparison of skills, qualifications, trends and employment intelligence. SW TUC also felt that regional relevance was a major issue – to be used, it has to be regional or more local, otherwise only the national team would look at it.

9.5 Format

UKCES recognised it was easy for them to navigate. The homepage could be more engaging and it could be worth dividing between supply and demand data. The LEP wanted to ‘google’ their way around the site so they could search for relevant material more easily. It could also be better structured so they could navigate more easily around it. Dorset CC noted that the NOMIS site they use has a ‘table finder tool’ and a similar tool would be helpful here to direct users quickly to what they need.

The format did not work on an old browser for JCP. One or two of the careers guidance organisations felt that it needed an evaluation user group as it was not very user-friendly or intuitive. It may be worth using a website usability test on it. Strode College, Exeter CVS and SW TUC could all adequately navigate the site. CITB also had no problems with the format but wanted some better explanations of what it was for – entry level information would be beneficial. Care South wanted the occupational classifications/categories revisited so they could get an idea of the nature of the Care sector workforce.

9.6 LMI that Stakeholders wanted on the site

UKCES wanted a synthesis of existing data and intelligence across the EU as a start to the analytical process. Perhaps an analytical framework for everything to sit in that is more obvious. They suggested a possible structure of:

1. Overview of employment picture
 - Profile across sectors/occupations
 - Mismatches and skill gaps
 - Unemployment
 - Future evidence and forecasts
 - A key resource overview

The LEP and Dorset CC wondered if it could have more data for bids. The LEP felt it was a chance to look at ESF and ERDF related data and intelligence, and there could be evidence of where data had driven successful bids and projects, particularly details of outcomes, prosperity and growth. Strode College wanted local-level intelligence.

Dorset CC would like to see benchmarking consistent with UK indicators and an ability to look at comparable data from other countries. It would also be good to see good practice in mechanisms being used elsewhere in Europe.

JCP wanted it to provide intelligence on the availability of work in other countries – perhaps with links to the EURES service and perhaps with summaries on emerging trends, areas and occupations/skills. Further forecasting would be useful and reflection on how the labour market is changing. The independent Careers

Guidance Professional wanted some sort of front end so it was easier to search/sort by English language terms or occupations (*e.g.* search for accountant) and it needed to link to EURES vacancy data.

CITB wanted the inclusion of a national and local comparator of LMI on sectoral occupations, Aand Care South wanted a better understanding of the sector workforce in different countries – what skills and occupations were in decline/surplus etc – where they could recruit staff with the skills they needed.

SW TUC recognised that their policy officers may like to use the site to gain intelligence to help make the case for their campaigns. It could contain intelligence on worker migration.

10. Concluding remarks

10.1 What LMI the LEP and other stakeholders need

UKCES have the LMI they need. Some international benchmarking would be useful, and the Panorama could help with this.

The LEP are very driven by local need and their commissioning of local intelligence reports delivering Economic Assessment, Dashboards of indicators and sector reports makes very good sense. They need to be careful not to over extrapolate local data which can sometimes be not very accurate – so use national and regional data and back up with local qualitative intelligence. Benchmarking data will be critical to determining success.

At Dorset CC, they need a wide range of datasets and make good use of those available. They need datasets to local level – as local as possible – for strategy development. With the skills they have, it is data and some qualitative information that they need. CENSUS, Labour Force Survey and Business Register and Employment Survey (BRES) (formerly the Annual Business Inquiry) are all useful. They also need an up-to-date source of demand-side data for the labour market. They currently make use of an acceptable forecasting model.

JCP have the LMI they need for a reactive role. They would benefit, though, from knowing more about the other 65% of vacancies they do not see and from more forecasting which would help with planning their offer.

JobShop UK would benefit from intelligence on trends over the longer term with forecasting of supply and demand plus lots of real time local LMI on who is hiring and what skills are available. In particular, they need better local supply and demand data.

The independent Careers Guidance Professional requires information about Apprenticeship (and other) training opportunities, mainly at the local level. As well as this they would like intelligence on wage rates, transport and travel opportunities, competition for training and education courses. It would also be useful to have intelligence on career pathways within occupations and opportunities for employment outside the area. Real-time information about employers and their recruitment/training needs is currently problematic.

The Exeter College 16-18 service need to spend time matching their data (which they need more of) and intelligence to more information on the demand side at both national and local levels. The teams they have for apprenticeships are part of this but there is a need for a higher-level skills element.

CITB have the LMI they need. LMI for them is really about detailed demand and supply data at sectoral and occupational levels – with as much forecasting as possible linked to national and local developments.

Greendale Construction would benefit from local LMI about what occupations are available in the local area (sub-regional) and if the skills/occupations are not available, where the people they can recruit might be. Greendale's strategy of being highly active in local and national sector strategy bodies gives them a good understanding of the kinds of issue LMI would otherwise be needed for.

Care South need a very detailed understanding of the sector at the local level – rates/turnover/qualifications/training etc and new/predicted changes. They also need to know about available labour and where there is a need for their service – and where there are competitors.

Strode College need very local LMI for their small catchment. Early warning of changing employer requirements is essential to help change provision (including start-up and closures, redundancies etc). They are a small college that sees being flexible as its strength. It is able to put on courses that others would find uneconomic. Vacancy data would be useful as it is not currently provided on NOMIS and is hard to analyse on the Universal Job Match portal.

Exeter CVS need local employment data and intelligence on their sector (voluntary). Local surveys and better data from providers and training bodies would be ideal, plus a better nuanced narrative from experts in the sector to help them with strategic decisions and to inform bids and project development.

SW TUC need LMI to provide regional and local-level intelligence to help support campaigns. The media like local or national stories, so for them, local LMI is always the best.

10.2 Gaps in current LMI usage

There are no real gaps for the UKCES - they have a very detailed use and knowledge of LMI. Clearly the issue with the DWP data about vacancies is an issue as it is for all involved in the project including Dorset CC who also need it. They may need to invest in new tools/systems to get it because the DWP data is failing and is in transition. Demand-side forecasting exists but not to the local level. As with the Local Authority, the LEP also need vacancy data. They could also benefit from increased use of careers advice tools such as the new 'LMI for all' tool from UKCES.

The critical gap for JCP is the 65% of vacancy intelligence to which they do not have access. For JobShop UK, they really need more intelligence on the supply side of FE and HE, plus maybe a service for mining JCP and others for LMI. They are very reliant on existing customers plus being active on chambers of commerce and other local boards. If they are to expand nationally, they may need more better-quality LMI in general.

The independent Careers Guidance Professional would benefit from more local demand-level data and intelligence.

Exeter College's 16-18 service would benefit from:

- analysis of their cohort destination;
- demand side intelligence (national, sectoral and local);
- enhanced internal careers advice and guidance;
- greater LMI for parents.

The obvious gap for CITB is in reliable supply side data on qualifications at medium and higher levels. For Greendale Construction, the only clear gap is in the availability of local LMI to bolster their understanding of trends in the availability of workers and demography. They could make good use of the strategic and higher-level data from CITB.

The LMI solutions for Care South are probably routed in looking longer term at their own data and looking actively for new areas of the labour market to recruit from.

Strode College could use LMI for longer-term horizon-scanning and strategy-forming purposes.

SW TUC could make better use of available regional and local LMI but they have very few resources and are well supplied with LMI from the central team.

Exeter CVS would benefit from a better narrative to understand what is happening in the local labour market and especially evidencing support for the unemployed. More on their sector would also be good, perhaps via surveys. As a representative body, they could use this LMI to provide better, more qualitative information and intelligence to their members.

10.3 Role the Panorama could play for Stakeholders

The UKCES see the Panorama as having a role in international benchmarking, giving a wider audience to the research they produce and enhancing the capacity to combine their work with similar intelligence from elsewhere.

The LEP would like the Panorama to place an emphasis on what works and why and examples of good and innovative interventions following data analysis and intelligence studies. They would benefit from a chance to use it for benchmarking against comparable sized areas with similar geographies and sectors.

Dorset CC would like access to datasets and an understanding of what is available elsewhere – mainly as interesting reports on techniques, tools and mechanisms that have helped deliver outcomes and policies.

The Panorama could help with central JCP planning and a link to EURES would help.

JobShop Uk would like to see intelligence on what sectors will need staff and where potential recruits may come from – including intelligence on migration.

Strode College and Exeter College's 16-18 years service felt it could confirm their ideas and give them an impetus for using LMI and considering the labour market. It could also help with understanding what other students/systems have in terms of skills and qualifications, and what occupations are growing in numbers to inform longer-term planning and strategy.

For all three of the employer organisations, the potential benefit from the Panorama is relatively straightforward and is concerned with gaining an enhanced understanding of trends in the supply of certain occupational groups. CITB could also benefit their industry for looking overseas at what is happening with the demand and supply of certain occupations and skills periodically.

For Exeter CVS, the most obvious use was to help in informing EU and other bids for money.

For the SW TUC the Panorama could host migration data and intelligence on pay and other traditional social partner concerns. It could help frame the argument in campaigns.

10.4 Barriers to using LMI

There are no real barriers to using the Panorama for the skilled users in the policy-oriented UKCES, LEP and Dorset CC. The only real barriers to the careers guidance and employer organisations' use of the Panorama are time and some skills in comparative data analysis. Greendale Construction have no expertise or experience and do not see how it could link to strategy and recruitment/business planning.

The barriers for Strode College, SW TUC and Exeter CVS are really around the issue of time and resources. They can use the site but would need a major reason.

10.5 Potential new uses for LMI

UKCES could probably make better use of their own LMI for profiling themselves and government – especially in terms of HR and recruitment. They are a resource central government could use better.

The LEP could build on existing models to compare with other sub-regions through benchmarking. Better vacancy and demand-side data would be ideal as would a means of keeping on top of new research and intelligence on new growth areas. Intelligence on good projects and programmes was requested.

Dorset CC could build on existing models to compare with other sub-regions. They need better vacancy and demand-side data and, along with similar organisations in the UK, their analytical capacity is slowly shrinking.

JCP could benefit from sharing LMI with others and perhaps mining LMI from other online sources recruiting locally. They could share with providers and others to let people know about what vacancies are hard to fill and what skills are available. The Exeter College 16-18 years team could derive a lot of benefit from enhanced internal and external LMI usage. The providers of guidance to young people would benefit from tailored LMI for parents.

CITB are expert in the use of LMI and there are no obvious new uses they could put it to without the addition of 'new data and LMI resources/tools'. Some qualitative reflections on the development of the sector in Europe in relation to the demand for skills and qualifications would be interesting.

Care South make excellent use of the LMI they have. They could perhaps use LMI to do more long-term planning and thinking about where they recruit.

Greendale Construction could benefit from a look at sectoral change in the demand for certain occupational groups that they rely upon and general trends in the industry. They can get this from their existing contacts (CITB etc).

Strode College felt there was a potential new use for LMI in supporting a more sophisticated Contact Management System (CMS). Other Colleges have invested in these recently.

Exeter CVS are using LMI to empower and support their members in Exeter and Devon and providing better intelligence for bidding and project planning.

SW TUC could build regional and local LMI into their news and intelligence service to members, using it as a hook to attract media coverage.

10.6 Changes needed to enable better usage of LMI

UKCES and Dorset CC do not really need to make changes. Perhaps a different steer from central government to encourage partnership working at the local level and a clearer steer as to how the data should be used to drive would be beneficial. The LEP would benefit from extra time and resource at the centre of their organisation, but they have skills they can use among the partners.

JCP would need a new resource for mining other vacancies or a policy change to require advertising of all vacancies. They have a good set up in place to make best use of LMI.

JobShop UK would need to source the intelligence they require and find a way to incorporate it into their very client-centred service.

Exeter College 16-18 years service would benefit from high-level policy decisions to enhance their internal use of LMI and from bringing teams together to share intelligence.

CITB and Care South, to enable better use of LMI, would require either a new tool or supply of LMI (ideally from the skills/occupations supply side) or a look, longer term, at other developments, perhaps via the Panorama.

Greendale Construction would need to see obvious benefits from changing the successful way they work at present. The most obvious route would be to take a look at the kind of intelligence provided by CITB and others in the sector when it comes to their next strategy planning period.

At Strode College, it is the size/value of business investments that would need to change; they need to prepare economic justification for bidding.

Exeter CVS would benefit from their observatory idea and, providing they can source the local LMI, this would be a valuable service to members.

SW TUC would either need extra resource for their very small team or would need the central team in London to pay more attention to the provision of local and regional LMI.

10.7 Potential for sharing more LMI

UKCES already do this very well but could probably do more outside of the usual policy and large employer/employer representative circles. However, the Government is more likely to try and get the private sector to do this (such as through LMI for all).

The LEP already do share LMI – such as the reports they produced via the Marchmont Observatory. Finding useable local-level data and intelligence and sharing it with partners to help build up a consistent framework/approach.

Dorset CC have a lot to share as they have a great many staff and a lot of LMI. They already share analysis of the local and national environment via their 'Lowdown' e-zine. They also collaborate well (very well) with their nearby local authorities, sharing data and intelligence.

JCP have enormous capacity to share LMI and their Universal Job Match needs improving as it is criticised by most other LMI users. They need to provide good local data on vacancies, ideally boosted by the use of Monster's own LMI.

CITB, unsurprisingly, have lots of LMI to share and they very much do. The Panorama could be a way of sharing the LMI they have on the UK sector with other countries. They would share sectoral and occupational data and general trends in training and skills needs – plus what skills gaps exist. They could also share the tool they have for working with small scale-projects.

Potentially, Care South also have lots of LMI to share, but theirs is a very competitive labour market and small salary differences can make a big difference to recruitment and retention. The big advantage to them from sharing LMI should be sectorally for their SSC to make the case for enhancing recruitment and employment terms to ease skills shortages.

Greendale Construction already share LMI with the Government and they could perhaps share more sectorally in their local area to help identify where similar organisations are also struggling to recruit. This could be linked to FE and HE (perhaps via the LEP) and should feed into the LEP Strategy for Growth.

Strode College have little LMI they can share other than destination and qualifications/awarding intelligence. Nonetheless, this would be useful for local planning and for employers seeking to gain an understanding of what skills and occupations may be in short supply. Exeter CVS also do not have a great deal of LMI to share although they are considering a survey which would be valuable. They could also provide some narrative to existing LMI to support members. Similarly, SW TUC have little of their own intelligence to share.

10.8 Other reflections on Stakeholders' use of LMI

The project would benefit from taking a look at the relationship that JobShop UK have with REC as this may be good or interesting practice – and an example of how a small organisation can get good LMI through sharing what they have with a national body. CITB are a good example of a large sectoral organisation which may be an example of good practice in their use of LMI.

The setting for LMI can be problematic, for instance, the independent careers professional was very concerned about the impartiality of advice given by FE institutions since they are motivated to recruit

students. The College sector is also capable of sharing lots of data on the supply of trained individuals and this would benefit the demand side (employers) and planners, but this data is often missing and may be deemed 'confidential'. JobShop UK have recognised a lack of supply-side intelligence as a potential obstacle. They understand the demand side and work well with employers – but they do not have robust intelligence from training providers and the College about numbers of people achieving certain key occupation level qualifications at either Higher or Further Education institutions.

There is a real need in the UK for a National Careers Service that is not just online but coordinated through colleges and training providers. Schools have no statutory obligation to offer work experience (no funding), although some still do it.

Strategic bodies need to find a way of tapping the limited LMI analysis available to them as this is a dwindling resource.

Quite often, organisations evaluate strategies informed by LMI but not the LMI itself, which is assumed to be correct. Evaluations need to look harder at assumptions from the evidence base, which can be wrong.

The LEP could build on existing models to compare with other sub-regions through benchmarking. Better vacancy and demand side data would be ideal as would a means of keeping on top of new research and intelligence on new growth areas. Intelligence on good projects and programmes was requested.

Universal Job Match has failed to deliver on expectations and JCP would be well served by exploring how their partners can get better LMI from it.

JCP, UKCES and most major providers of LMI do not do planning. This falls to the LEPs and the training market, with providers aligning training to what they perceive to be need. Clearly the ability to commission bespoke provision is important for JCP as are their new flexibilities – but again these are local and personal. The LEPs need to consider their pivotal role in using the LMI for planning as others are not doing this.

The internet is a significant resource in providing access to LMI but there is a lot there. At the same time, in the UK, there is less quality, local intelligence. LEPs need to ensure the provision of new and robust local LMI bringing new data and intelligence from partners into the process.

11. APPENDIX 1: LIST OF INTERVIEWED STAKEHOLDERS IN THE DORSET LOCAL ENTERPRISE PARTNERSHIP

Stakeholder organisation	English translation
Dorset CC	Local Government
Dorset Local Enterprise partnership	Regional Government/Development Agency
Strode College	Training Provider (College)
Jobshop UK	Recruitment Agency
Employer (Private)	Greendale Construction
Employer (3rd Sector)	Care South

12. APPENDIX 2: LIST OF INTERVIEWED STAKEHOLDERS NOT PART OF THE DORSET LOCAL ENTERPRISE PARTNERSHIP

Stakeholder organisation	English translation
United Kingdom Commission for Employment and Skills	National Government
Exeter College	College Careers Service (16 – 18yrs) – School equivalent
Careers Guidance Consultant	Careers Guidance
JobCentre PLUS	Public Employment Service
Construction Industry Training Board	Sector Skills Council / Employer Representative
South West TUC	Trades Union Congress / Citizens Representative
Exeter CVS	Voluntary Sector Representative

13. GLOSSARY OF TERMS

BIS	Department for Business, Innovation and Skills
DWP	Department for Work and Pensions
ENRLMM	European Network for Regional Labour Market Monitoring
ESB	Employment and Skills Board
FE	Further Education
HE	Higher Education
HEI	Higher Education Institution
JCP	Jobcentre Plus
LEP	Local Enterprise Partnership
LMI	Labour Market Information or Intelligence
NDPB	Non-Departmental Public Body
NEET	Not in Education, Employment or Training
ONS	Office for National Statistics
RDA	Regional Development Agency
SSC	Sector Skills Council

Contact: Dr Andrew Dean

Marchmont Observatory
University of Exeter
Innovation Centre
Rennes Drive
Exeter
EX4 4RN

T: 01392 264925