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# Monthly Labour Market Report

## Welcome

The Monthly Labour Market Report from the Learning and Skills Observatory Wales (LSO) aims to provide the main headlines on the Welsh labour market and is based on the latest data available.

This month's issue puts the spotlight on youth unemployment in Wales.

This report was produced by the Centre for Economic and Social Inclusion (known as *Inclusion*), commissioned by Welsh Government to blend Wales' available labour market information (LMI) (from the various sources) and produce a monthly analysis. Whilst the report is owned by Welsh Government it is not validated in terms of its specific content or interpretation.

*Inclusion* has an unrivalled understanding of the labour market based on over 28 years of experience of working with the range of stakeholders involved in delivering employment and skills services. We collect and analyse both national and local labour market data through our well developed Local Labour Market Information System, conduct research on employment and skills issues at the local level, run events that bring together policymakers and providers in the skills and employment sector, and produce weekly e-briefings that summarise what is new in employment and skills for our subscribers.

We currently supply monthly employment and skills data to the Greater London Authority, as well as providing labour market tools and analysis for Greater Manchester.

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## Latest labour market trends

### Employment

Employment data from the Labour Force Survey (LFS) – estimates obtained from a large sample quarterly rolling survey of households – show that Wales outperformed England though not Scotland and Northern Ireland in the rolling quarter February to April 2013. However, the Office for National Statistics' (ONS') quarterly estimate of the number of Workforce Jobs – obtained in part from surveys of employers – shows Wales having a greater reduction in jobs than any other UK region or nation between December 2012 and March 2013.

The (seasonally adjusted) LFS estimate of the number of people aged 16 and over in employment in Wales increased by 10,000 (+0.8%) compared to the previous quarter (November 2012–January 2013) to a total of 1.364 million. The quarterly increase in employment in Wales is comprised of an increase in male employment of 7,000 (+1.0%) and an increase in female employment of 3,000 (+0.5%).

The total quarterly increase in employment in Wales compares to a corresponding increase in total UK employment of 24,000 (+0.08%). The net increase in total UK employment comprised a net decrease in employment in England of 44,000 offset by a net increase in both Scotland (47,000) and Northern Ireland (11,000) in addition to that in Wales.

The overall net quarterly changes in employment were quite small relative to population size, the ONS commenting that 'employment rates showed few very large changes for the regions and countries of the UK.' The working age employment rate for Wales (i.e. the proportion of the population aged 16–64 in employment) increased in the quarter by 0.4 percentage points to 69.4%, compared with a decrease of 0.2 percentage points in England and increases of 1.1 percentage points and 0.8 percentage points in Scotland and Northern Ireland respectively. The employment rate in Wales is 2.1 percentage points lower than the UK average (71.5%) and lower than the employment rate in both England (71.6%) and Scotland (72.2%) but higher than the rate in Northern Ireland (67.1%).

Each calendar quarter the ONS also publishes an estimate of jobs in the economy which complements the LFS estimate of the number of people in employment. The (seasonally adjusted) Workforce Jobs estimate is obtained from a combination of employer surveys and administrative data in addition to the LFS. The number of jobs in the economy will not necessarily equal the number of people in employment given that some people will hold more than one job. The LFS and Workforce Jobs estimates can also differ because of differences in the method of obtaining the respective estimates as the LFS is residence based and workforce jobs is workplace based

The latest Workforce Jobs estimate shows that there were 1.363 million jobs in Wales as of March 2013. This estimate is close to the corresponding LFS estimate. However, whereas the LFS shows an increase in the number of people in work in the first quarter of 2013 the Workforce Jobs series shows a reduction in jobs of 30,000 (–2.1%). This contrasts with a substantial increase in jobs in England (+254,000, +0.9%) and a much smaller decrease in jobs in Scotland (–7,000, –0.3%) and Northern Ireland (–6,000, –0.8%). As noted in the previous paragraph due to the difference in data sources it is not possible to draw definitive conclusions as to why LFS employment has gone up whilst Workforce jobs have decreased. What is apparent from the Workforce Jobs data is that one industrial sub-sector – accommodation and food services – accounts for more than two-thirds of the decrease in jobs in Wales between December 2012 and March 2013. The quarterly decrease in jobs in that sector alone was 21,000 (–21.7%).

## Unemployment and economic inactivity

The number of people in Wales who are unemployed on the International Labour Organisation (ILO) LFS definition was unchanged at 125,000 between the quarters November 2012 to January 2013 and February 2013 to April 2013. This was despite the 10,000 increase in the number of people in employment because of an offsetting increase in the number of people active in the labour market. The number of unemployed men decreased by 1,000 (-1.2%), the number of unemployed women increased by 1,000 (+2.1%). In the quarter total unemployment decreased by 6,000 in Scotland and by 5,000 in Northern Ireland but increased by 6,000 in England.

The ILO unemployment rate in Wales was unchanged at 8.4%. The UK average rate of ILO unemployment was also unchanged at 7.8%. The ONS notes that 'regional figures for the unemployment rate are quite volatile, which needs to be allowed for when considering the pattern of change over time'. However, there is a significant gap between the ILO unemployment rate in Wales and that in England (7.8%), Scotland (7.1%) and Northern Ireland (7.8%).

The administrative count of people unemployed and claiming Jobseeker's Allowance (JSA) is somewhat lower (77,400 in Wales in May 2013, a JSA claimant count rate of 5.3%) than ILO unemployment because non-JSA claimant jobseekers are excluded. The number of JSA claimants in Wales decreased by 200 between April and May. However care should be taken in interpreting change in the claimant count since this can be influenced by changes to the benefit system as well as underlying change in the labour market.

## Youth unemployment

For the year ending 31 March 2013, there were 47,000 16-24 year olds unemployed in Wales, a rate of 22.2% (down 1.7 percentage points over the year). There were 961,000 16-24 year olds unemployed in the UK, a rate of 21.0% (down 0.2 percentage points over the year).

Another alternative measure of the economic and social distress of youth unemployment is the number of 16-24 year olds not in employment, education or training (NEET). This combines the number of active youth jobseekers (excluding full-time student jobseekers) with economically inactive jobless young people outside the education and training system. The 'NEET rate' is this total expressed as a percentage of the total population of 16-24 year olds.

The ONS have recently begun to publish NEET estimates for the UK obtained from the LFS which show that 1.09 million 16-24 year olds were NEET at quarter 1 of 2013 (a NEET rate of 15.1%, down from 16.4% in quarter 1 of 2012). Just over half (53%) of those NEET in quarter 1 of 2013 were economically active (i.e. looking for work and available for work) and thus also ILO unemployed.

The Welsh Government does publish its own official estimates, but these are not directly comparable with the ONS estimates. These provisionally show that 70,600 16-24 year olds in Wales were NEET in the year ending 2011. Measured on this basis the NEET rate for 16-18 year olds in Wales was 12.1% (down from 11.5% a year earlier) and 22.1% for 19-24 year olds (down from 22.9% a year earlier)

## LMI scorecard

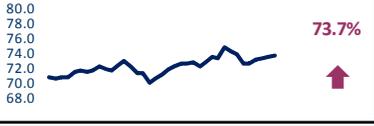
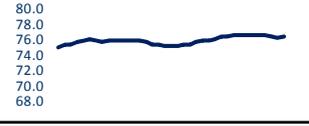
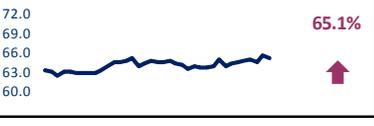
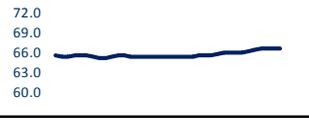
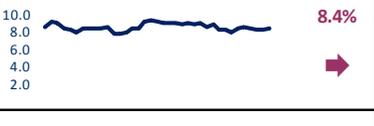
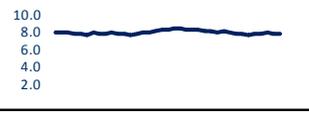
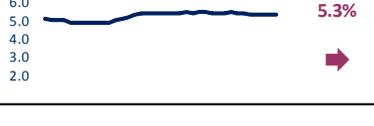
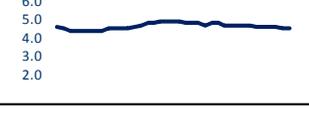
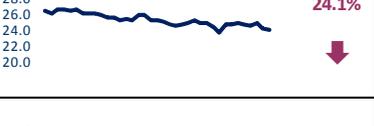
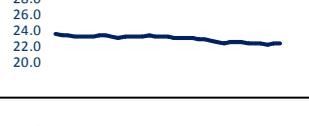
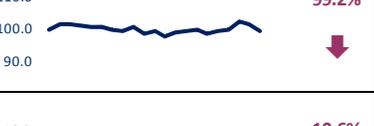
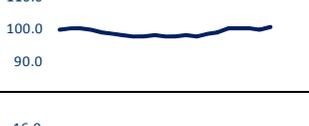
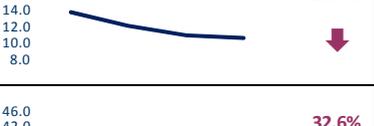
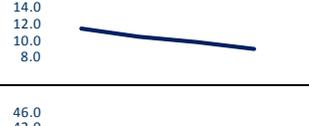
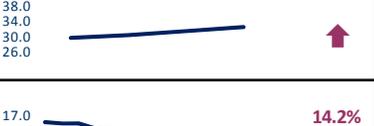
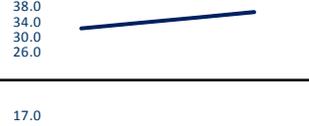
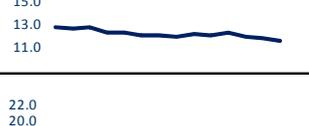
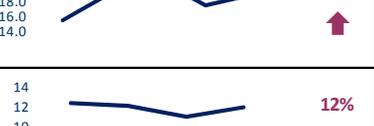
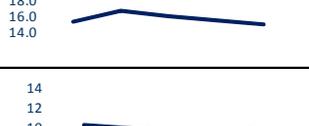
The scorecard presents recent trends and figures for a number of core labour market indicators, using a variety of different sources:

	Source
Working age employment rate	1
Working age male employment rate	1
Working age female employment rate	1
ILO unemployment rate 16+	1
Claimant count as a proportion of the working age population	2
Working age economic inactivity	1
Index of workforce jobs	3
Proportion of the working age population with no qualifications	4
Proportion of the working age population qualified to NQF4+	4
Proportion of the working age population who claim out of work benefits	5
Children living in workless households	6
Proportion of 16–18 year olds who are not in employment, education or training	7

- 1 LFS, ONS: subject to sampling variability and should be used with caution
- 2 Claimant count seasonally adjusted, NOMIS: trends can be affected by changes to benefit rules
- 3 Employer surveys, household surveys and administrative sources, ONS
- 4 Annual Population Survey/Annual Local LFS, ONS. Data is subject to sampling variability and should be used with caution.
- 5 Department for Work and Pensions, NOMIS
- 6 Household LFS, ONS: subject to sampling variability and should be used with caution
- 7 Source: ONS, Higher Education Statistics Agency, Welsh Government Lifelong Learning Wales Record, Pupil Level Annual School Census, Annual Population Survey.

# LMI Scorecard

June 2013

		Wales		Difference between Wales and National (latest figures): Better Worse	NATIONAL (UK or GB depending on indicator)	
		Trend (Three to four years)	Latest result & trend		Latest result & trend	Trend (Three to four years)
Supply of Labour	Working age employment rate (%)		69.4% ↑	-2.1 Charts cover: Feb-Apr 10 to Feb-Apr 13	71.5% ↑	
	Working age male employment rate (%)		73.7% ↑	-2.6 Charts cover: Feb-Apr 10 to Feb-Apr 13	76.3% ↑	
	Working age female employment rate (%)		65.1% ↑	-1.6 Charts cover: Feb-Apr 10 to Feb-Apr 13	66.7% ↑	
	ILO Unemployment rate 16+ (%)		8.4% →	0.6 Charts cover: Feb-Apr 10 to Feb-Apr 13	7.8% →	
	Claimant Count as a proportion of the working age population, seasonally adjusted (%)		5.3% →	0.8 Charts cover: May 10 to May 13	4.5% →	
	Working age economic inactivity (%)		24.1% ↓	1.7 Charts cover: Feb-Apr 10 to Feb-Apr 13	22.4% ↓	
Demand	Index of workforce jobs. 2008 Q1=100		99.2% ↓	-1.5 Charts cover: 2008 Q1 to 2013 Q1	100.7% →	
Skill gaps	Proportion of the working age population with no qualifications (%)		10.6% ↓	1.6 Charts cover: Year to Dec 09 to year to Dec 12	9.0% ↓	
	Proportion of the working age population qualified to NQF4+ (%)		32.6% ↑	-4.1 Charts cover: Year to Dec 09 to year to Dec 12	36.7% ↑	
Worklessness & NEETS	Proportion of the working age population who claim out of work benefits		14.2% ↓	2.6 Charts cover: Aug 09 to Nov 12	11.6% ↓	
	Children living in workless households (%)		19.1% ↑	4.1 Charts cover: Apr-Jun 2008 to 2012	15.0% ↓	
	Proportion of 16-18 year olds who are NEET (%)		12% →	2 Charts cover: 2008 to 2011	10% England →	

# Youth Unemployment in Wales

## Introduction

There is growing consensus that without further action we risk a lost generation of young people – shut out of the labour market and increasingly disconnected from work and learning (source: *Inclusion*, 2011). Across the UK, youth unemployment currently stands at almost one million, with the long-term unemployed accounting for around two-fifths of total claimants.

Beneath these headline figures, it is now clear that the continuing downturn in the UK is having a greater impact on young people than older people and that the impact is significantly worse in this recession than in the last. In the 1990s (*Inclusion*, 2011), youth unemployment in the UK fell by 20% in the two years after it peaked. In the two years since the peak after the last recession, by comparison, unemployment has risen – up by 7%. This gap is equivalent to 240,000 more unemployed young people in the UK.

The challenge for policy-makers, then as now is to ensure that high youth unemployment does not lead to permanent impacts for those individuals, where there is compelling evidence that long-term unemployment can lead to lower wages and wellbeing later in life. Long-term unemployment is also bad for the economy – by reducing the number of people ready to work and so storing up inflationary problems for when the recovery comes.

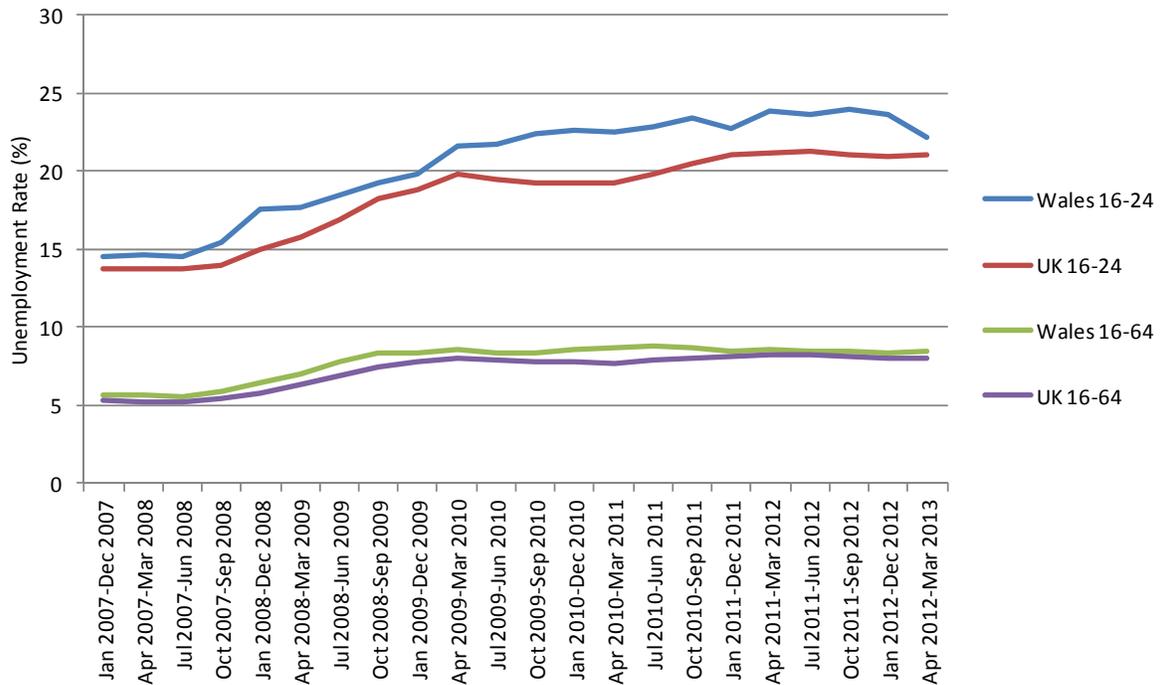
In many cases, young people have responded to this downturn by staying in education. They have been supported in this by successive governments' commitment to increasing the supply of learning places. This is most notable at 16 and 17, where the proportion of people not in education or employment in the UK has actually fallen since the recession began. However, this has only really masked the labour market problem – now fewer than one in four 16–17 year olds do any kind of work; while unemployment is highest at age 18, as young people leave the education system and find themselves competing for jobs.

Alongside this, successive governments have sought to understand and address – with limited success – an underlying structural issue that has led to youth unemployment in the UK never falling below 500,000 in the past 20 years, and at least one in seven young people being out of work and out of full-time learning. Indeed youth unemployment in the UK rose by over 100,000 between 2004 and 2008, and was above 1997 levels before the downturn even began.

## Latest figures and recent trends

Latest figures from the Annual Population Survey (APS) suggest that there were an average of 47,000 unemployed people aged 16–24 in Wales from April to March 2013. This equates to an unemployment rate of 22.2% for that age group, the highest of the UK nations, compared with 21.0% for the UK as a whole. The unemployment rate has fallen compared to the same period in 2012 (23.9%), in terms of absolute numbers it has fallen from its peak level of 51,200 in the third quarter of 2010.

Figure 1 shows that relatively high levels of youth unemployment existed before the start of the recession in 2008, but highlights that unemployment among 16–24 year olds rose more sharply in Wales compared to the UK, with the gap in the unemployment rate rising from just 0.7 percentage points in 2007 to 3.3 percentage points at its widest at the end of 2010. It has now narrowed to 1.7 percentage points.

**Figure 1: Youth Unemployment, Wales vs UK, 2007/13**

Source: Annual Population Survey ([StatWales](#))

One issue affecting the LFS unemployment figures is that of full-time students who can be defined as unemployed under the ILO definition, if they are actively seeking work in combination with their studies. It could be argued that those in full-time education do not fall in the category of those most in need of support to engage with the labour market, so it may be interesting to look at how their removal from the statistics affects unemployment levels. Using a four quarter average from the LFS up to the first quarter of 2013, analysis by *Inclusion* suggests that excluding students reduces the number of unemployed aged 16–24 years from around 52,400 to 39,700. However, the removal of economically active students from the denominator used to calculate unemployment rates results in no significant change in the unemployment rate for this age group in Wales.

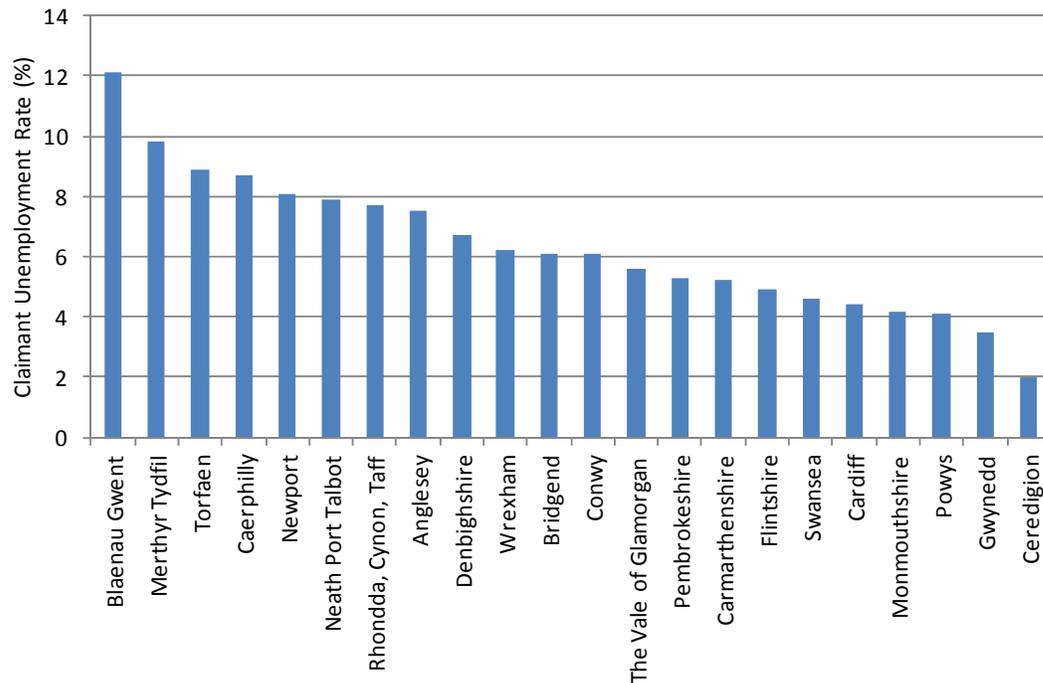
### Claimant count

With the LFS being a sample-based survey, a robust detailed analysis is not possible, particularly at local authority level. The claimant count of unemployment is a more reliable data source for local area analysis and examining issues such as long-term unemployment, although it should be borne in mind that the claimant count only includes those unemployed people who are claiming JSA and by the students unable to claim (generally), and therefore estimates of unemployment will be lower than the official definition of unemployment as measured by the LFS.

Latest figures from the claimant count show a total of 22,075 JSA claimants aged 16–24 years in Wales, an unemployment rate of 5.9% compared with 5.2% for the UK as a whole. Both rates are significantly lower than those derived using the official definition of unemployment.

Figure 2 shows the differences in claimant unemployment by local authority, and highlights the extent of the problem of youth unemployment in the Valleys, which all have above average unemployment rates among 16–24 year olds

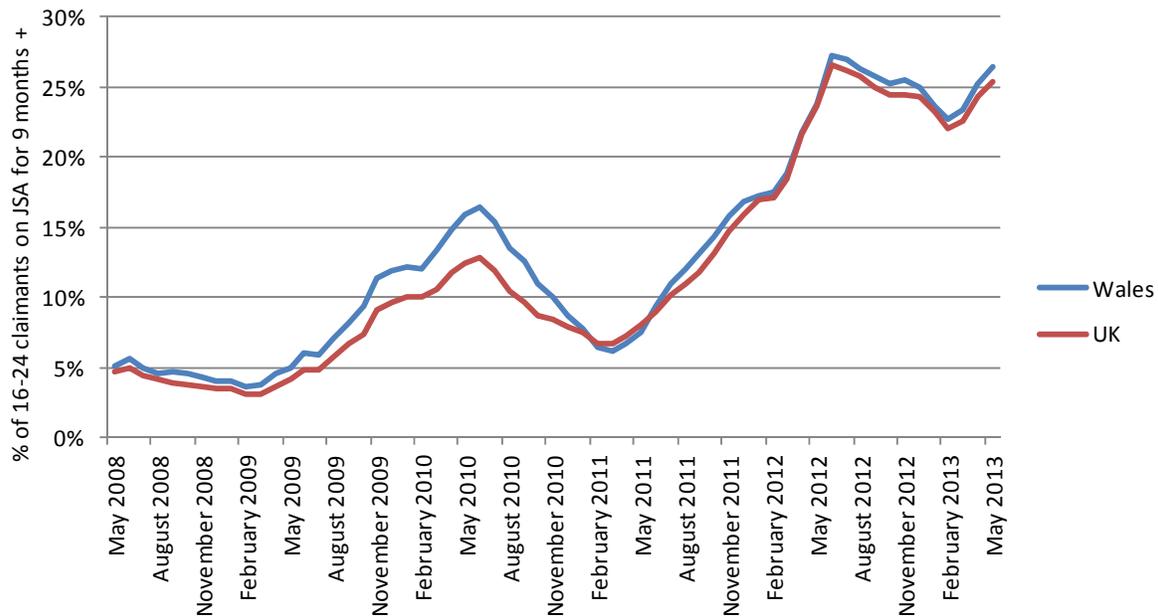
**Figure 2: Claimant unemployment rate among 16–24 year olds (%) by local authority, Wales, May 2013**



Source: Claimant count (via Nomis)

### Long-term unemployed

The claimant count also enables analysis of long-term unemployment. Figure 3 demonstrates the difficulties that young unemployed people have had finding work once they become unemployed. In 2008, around 5% of JSA claimants aged 16–24 years in Wales had been unemployed for at least nine months, a proportion that has risen sharply in two lengthy spells to its current level of 26.4% (5,835 claimants). Wales has closely followed the wider UK trend of this issue.

**Figure 3: JSA claimants aged 16–24 unemployed for 9 months or more (%), Wales vs UK, 2008/13**

Source: Claimant count (via Nomis)

Claiming JSA for nine months among 18–24 year olds should trigger their mandatory referral to the Work Programme, where they receive tailored support to enable them to find sustained employment. The evidence so far suggests that the Work Programme is not succeeding in getting sufficient numbers of people into work, with the continuing shortage of job opportunities resulting in very low proportions of long-term unemployed people finding work.

Work Programme performance in Wales appears to be among the worst in the UK<sup>1</sup>. A detailed analysis of the Work Programme in Wales will be the focus of the next issue of this bulletin.

### Young people not in education, employment or training

The majority of young people succeed in education and make a positive transition to adult life and the world of work. But there remains a small proportion who do not, and who become NEET. The Department of Education<sup>2</sup> acknowledges that being NEET between the ages of 16–18 years is associated with negative outcomes later in life, including unemployment, reduced earnings, poor health and depression.

In terms of statistics regarding NEETs, there are various sources that can be used to estimate the scale of the issue in Wales:

- Statistical First Release (SFR) 'Participation of young people in education and the labour market' using education data sources and the APS
- APS (ONS)

<sup>1</sup> [https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/210226/work-programme-stats-summary-june-2013\\_v2\\_020713.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/210226/work-programme-stats-summary-june-2013_v2_020713.pdf)

<sup>2</sup> <http://www.education.gov.uk/childrenandyoungpeople/youngpeople/participation/neet>

- Careers Wales Pupil Destinations from Schools in Wales survey.

The SFR is the definitive source of NEET data, although it is only published annually, with the latest SFR only providing figures up to the end of 2011. The APS offers more timely figures but is less robust statistically, as results are based on a relatively small sample of 16–18 year olds. It should also be noted that the different sources define NEETs slightly differently, so are not directly comparable with each other.

The most recent data from these sources are as follows:

- SFR basis – at the end of 2011, 12.1% of 16–18 year olds were NEET (13,800) compared with 11.5% (13,500) at the end of 2010. By comparison, 9.9% of 16–18 year olds in England were NEET at the end of 2011, up from 9.1% in 2010.
- APS basis – new data for the year ending quarter 4 2012 estimates that 11.8% of 16–18 year olds were estimated to be NEET, compared with 13.3% for the year ending quarter 4 2011.
- Pupil Destinations basis – new data as at November 2012 estimates that 4.2% of year 11 leavers were NEET compared with 4.4% in 2011.

### Addressing the Issue – what works?

The available data has demonstrated how the recent recession and ongoing sluggish UK economy has had a particular impact on young people finding themselves out of work, a problem which shows little sign of easing. Latest figures suggest that the performance of the government's Work Programme is well below expected levels, so what does work in terms of helping young unemployed people into sustained employment?

Several commentators highlight that the UK's youth unemployment is structural rather than cyclical, with high levels of worklessness among young people even when the economy was performing well (ACEVO, 2012 and Gregg, 2013). Levels of employment among young people are also very sensitive to conditions in certain sectors of the economy, such as retail and hospitality, which have been particularly hard hit during the downturn.

Although present labour market conditions are clearly difficult for young people, the ACEVO report sets out a number of ways in which youth unemployment could be reduced:

**Young people need more job opportunities to be available.** The immediate crisis will only be resolved through stronger labour market demand. ACEVO calls for a doubling of the number of job subsidies available, and for young people on the Work Programme for a year to be guaranteed a part-time 'First Step' job as a stepping stone to unsupported employment.

**Young people need better preparation and motivation for work.** Too many young people do not have the hard and soft skills they need to progress in education or work. Attainment in English and maths really matters. Too many have limited access to high-quality work experience and information and advice.

**Young people not heading for university need clear high-quality options for progression.** For those young people who do not go to university, there are too few high-quality progression routes to follow as they make the transition from being in full-time education to being in full-time work. ACEVO calls for more incentives on employers to engage with young people during their transition from education into work, and an expansion in the number of high-quality options available to young people (including apprenticeships). They also call for the creation of Job Ready, a locally-tailored, national programme for those most at risk of becoming long-term NEET, which would act early to prevent young people becoming NEET in the first place, and get those who do drop out back on track towards work rather than heading for long-term detachment from the labour market. They also proposed an innovative mentoring project where young people employed for a year are automatically registered

**Young people need reform of the welfare state, including guaranteed back-to-work support.** ACEVO concludes that there are many red herrings in the debate about youth unemployment. The cost of transport is an issue for many, and above all, access to and intervention by the welfare state is too often not having the impact needed. The government's Work Programme covers only around 1 in 10 of the young unemployed, so they call for eligibility for into-work support to be widened, so that fewer young people fall through the net. More intensive support should then be made available in a three stage offer:

1. Work experience placements should give young people in their first months of unemployment a better deal.
2. After one year looking for work on the Work Programme, young people should have access to a part-time 'First Step' job guarantee – combined with responsibilities for job search and preparation.
3. For those who reach the end of two years on the Work Programme and who still have not found a job, we should learn from programmes in countries such as Denmark and introduce an intermediate labour market scheme guaranteeing work plus support to move on to regular employment.

In summary, ongoing stagnation of the economy is highly unlikely to create sufficient new employment opportunities to make a significant reduction in youth unemployment but there are issues that are most crucial to addressing it, particularly in young people's work readiness. The first is work experience, which is vital to enable young people to get a 'foot in the door', from which they can begin to demonstrate the kind of experience to help them find further employment. The second is training and qualifications, which are a prerequisite. Most employers use these to filter job applications, so young people need to have the qualifications and training that are relevant to jobs and valued by employers.

## Jobs Growth Wales

In response to the problem of youth unemployment the Welsh Government launched the Jobs Growth Wales programme in April 2012 to create 4,000 jobs a year for job ready young people throughout Wales.

The programme caters for young people that are job ready but have had difficulty securing employment. The Jobs Growth Wales programme provides unemployed young people aged 16-24, with a job opportunity for a six month period paid at national minimum wage, paid at or above the national minimum wage for a minimum of 25 hours per week. Young people will be employed for the duration of the programme and the jobs created must be additional to, and not replace, positions that would otherwise be filled.

The ambition for the programme is that all of the job opportunities will be sustained by the host employer after the 6 months has completed. All job vacancies are advertised through the ['Jobs Growth Wales Live' system on the Careers Wales website.](#)

The programme offers opportunities in the private sector and voluntary sector with additional support for young people to enter self-employment and an enhanced support package for graduates.

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