

England – South West

Cogent in the Region

The Cogent industries in the South West Region:

- **Engineering** is the **second largest sector** in the South West.
- The Regional Economic Strategy identifies **Advanced Engineering** as a **priority sector** in the region.
- Manufacturing productivity in the South West is on par with the GB average, some sub-sectors have higher than average productivity, for example, engineering, transport equipment, clothing, etc.
- The region has the third highest proportion qualified to National Qualification Framework (NQF) level 4+, behind London and the South East.

The region has a dominant cluster of Cogent industries:

Sector employment in the region is dominated by Nuclear and Polymers. Oldbury, Hinkley Point A & B and Berkeley Nuclear Power Stations are situated the region. Only two are still generating power, the remaining activities are focused upon decommissioning of facilities, apart from Devonport dockyard where nuclear submarines are serviced. The region has a focus upon travel and tourism – the rural filling station infrastructure is vital in supporting this key sector. The pharmaceutical and biomedical industry in the South West is dynamic, constantly exploring opportunities for partnering, licensing and forging collaborations.

More information on Regional and Industry Research can be found at: www.cogent-ssc.com/research

Cogent UK Sector Headlines

- **£156bn turnover**
- **£49bn GVA**
- **6.5% of UK GVA**
- **12% of UK manufacturing workforce**
- **7% of UK manufacturing enterprises**

Cogent Headline Figures

Key Economic Indicators

2006	Cogent SW	Cogent UK
Turnover	£3.7bn	£156bn
Cogent GVA	£1.1bn	£49bn
Cogent GVA per Employee*	£46,273	£98,394
Number of employees	23,800	500,000**
Mean weekly pay***	£499.00	£381.50

Source: Annual Business Inquiry 2005

*UK GVA average per employee £31,419

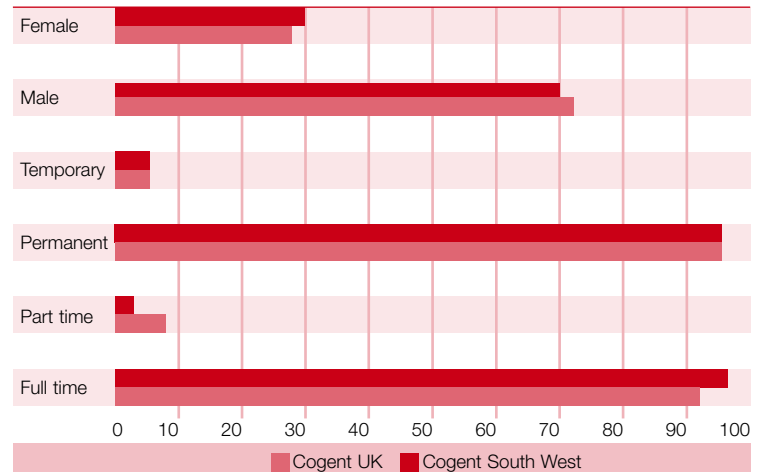
**Industry estimate of total Cogent employment 906,000

***Annual Survey of Hours and Earnings 2006

The South West industries account for:

- **2% of Cogent sector total turnover**
- **2% of Cogent sector total GVA**

Workforce Distribution



Source: Labour Force Survey Q3 2006 – Q2 2007

Cogent Workforce

Employers by Size Band

	1-10 Employees	11-49 Employees	50-199 Employees	200+ Employees	% of Total Employers	Total Employers
Cogent – South West	72%	21%	5%	2%	9%	1,700
Cogent – Great Britain	68%	23%	7%	2%	100%	18,500
Regional Economy - All sectors	84%	13%	3%	<1%	100%	212,100

Source: Annual Business Inquiry 2005

Cogent Workforce

Regional Employment by Industry

Industry Category	SW Employees	GB Total	SW Regional%
Chemicals Manufacturing and Processing	5,300	108,300	5%
Pharmaceuticals Manufacturing	3,800	57,600	7%
Polymers Manufacturing and Processing	13,800	179,200	8%
Manufacture of Refined Petroleum Products	*	10,100	*
Oil and Gas	*	28,000	*
Nuclear (inc direct supply chain)	10,000**	49,500	20%

20% of the **Nuclear** industry workforce is based in the South West.

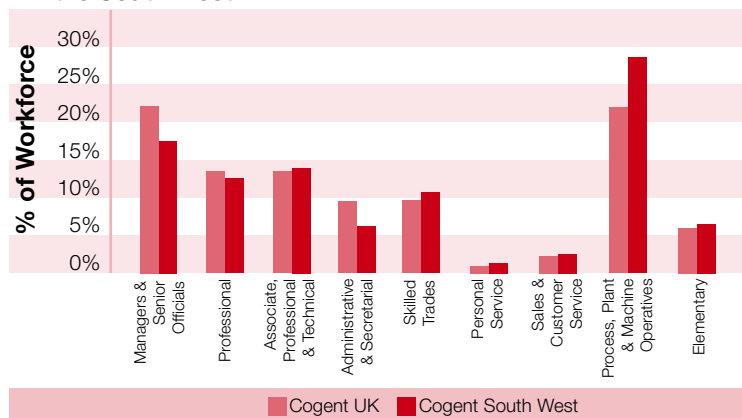
South West **Polymers** industry accounts for **8%** of the total industry GB workforce.

Source: Annual Business Inquiry 2005 (regional data rounded and is only Great Britain)

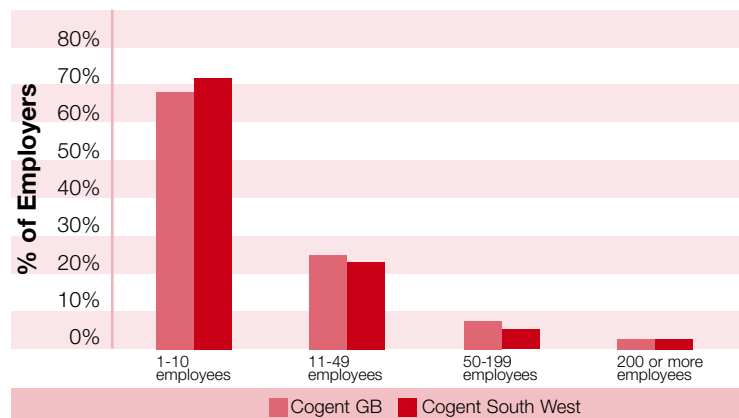
* Data suppressed

**National Skills Academy Nuclear, 2007 estimates

Occupational Distribution of the Cogent Sector in the South West



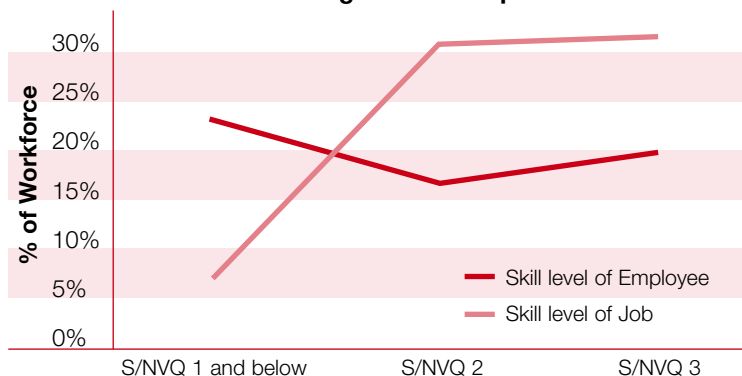
Business Size of the Cogent Sector in the South West



Source: Labour Force Survey Q3 2006 - Q2 2007

Source: Annual Business Inquiry 2005

Current Workforce: The Cogent Skills Gap



Source: Labour Force Survey Q3 2006 - Q2 2007

Key issues for the Cogent industries in the South West:

- **16% SURPLUS** of the workforce qualified to Level 1 and below
- **14% DEFICIT** of the workforce qualified to Level 2
- **12% DEFICIT** of the workforce qualified to Level 3

Cogent Sector Skills Demand¹

The proportion of vacancies reported in the Cogent sector is **higher** than the UK average by **2%**. Hard-to-fill and skills shortage vacancies are also **lower** than the UK average.

INTERNAL SKILLS GAPS are only **1% higher** than the UK average.

	Cogent SW	UK
Proportion of companies reporting vacancies	20%	18%
Proportion of companies reporting 'hard-to-fill' vacancies	6%	8%
Proportion of companies reporting a skills shortage vacancy	4%	6%
Proportion of companies reporting internal skills gaps	17%	16%

Cogent Sector Training¹

The proportion of companies who have trained their staff in the previous 12 months is **9% higher** than the UK incidence of training.

¹National Employer Skills Survey 2005

Proportion of firms that have provided funding for staff training within the previous 12 months	73%	64%
Of those firms which provided training, the proportion of staff trained	67%	68%

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