

Part 2

Analysis of industry statements on skills needs and shortages

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Introduction

In the context of frequent under-representation of equality groups in the labour market (and in apprenticeships in particular), the Equality and Human Rights Commission has been interested to probe the extent to which the pressure on industry – stemming from both outside the industry as well as from leading figures and groups within - can contribute to more equalised outcomes for all. While for the EHRC equal representation is an end in itself, the Commission has been particularly interested whether governments, independent sectoral bodies and industry leaders see countering under-representation as a way of addressing skills needs and shortages within industries.

The weightiest statements regarding demands for skills within industry come from three kinds of agents: the Governments, Sector Skills Councils and Industry Leadership Groups.

Sector Skills Councils (SSCs) are independent, employer-led, UK-wide organisations. Sector Skills Councils provide the employer leadership to address skills needs within and across sectors. The SSCs are a focal point for raising skills in sectors to drive enterprise, jobs and growth. Through their sectoral reach, SSCs are ideally placed to articulate the voice of employers on skills; to develop innovative skills solutions and to galvanise employer ambition and investment in skills and job creation.

Industry Leadership Groups comprise leading business figures drawn from across the private sector as well as senior representatives from the public sector including Scottish Enterprise, Scottish Government and key stakeholders. The Groups provide strategic leadership and advice to industry and the public sector in Scotland, to drive sector growth and industry wide collaboration and alignment.

In Scotland, the first review of industry statements from an equalities perspective was carried out by Blake Stevenson in 2010 ('Equality and Diversity Baseline Information on Scotland's Key Economic Sectors'). In early 2013, a research team led by Dr Filip Sosenko (Heriot-Watt University) was funded by the Equality and Human Rights Commission to update Blake Stevenson's baseline. The research team looked into Scottish and UK industry statements on skills demands and equalities contained within publications that were released from spring 2010 to April 2013, covering seven key Scottish industries.

The researchers have included documents produced by Sector Skills Councils as well as the Scottish Government/Scottish Enterprise/HIE/Skills Development Scotland, paying particular attention to any content related to employee diversity, skills shortages, barriers to entry, and the need for apprenticeship/entry level training programmes.

Due to time constraints a search for keywords has been conducted followed by a close reading of paragraphs that contained one or more of selected keywords. The keywords used were: 'equality, gender, women, female, age, young, BME, BAME, ethnic, ethnicity, minority, diversity, disability, disabled, faith, religion, sex, sexual, LGBT, equity, fair, "positive action" inclusive, under-represented, procurement, Apprenticeships, "Equality Act 2010", "Public Sector Equality Duty", and PSED'.

The structure of this chapter follows seven key industries. Within each section, a summary of key documents and a commentary are provided. Documents published by the Scottish Government and its agencies are summarised before Sector Skills Councils' publications. Descending date order has been employed.

Headline Findings

The review has revealed that warning statements about current and forthcoming skills needs and replacement demands are common, as are calls for attracting more young entrants into industries (with the exception of Tourism where under-30s make up almost half of the workforce).

Statistics are widely available for gender, disability and age groups, meaning that governmental agencies and Sector Skills Councils are well informed about inequalities with respect to these two groups. However, no data regarding sexual orientation or faith/belief seems to be collected in any of the seven key sectors. Statistics for ethnicity are patchy, with no data from Financial and Business Services, Food & Drink, and Universities being published in post-2010 documents. Ethnicity-related data is also very sparse for specific sub-sectors.

Looking across all reviewed sectors, it is obvious that gender imbalances get the most if not all of the attention. Only Skillset has explicitly called for more ethnic minority individuals in Creative Industries

while no governmental agency or Sector Skills Council has explicitly said that more disabled workers are needed in their sector.

Under-representation at managerial level is mentioned only sporadically and only with regards to women. (The exception being Skills for Health which also recognised progression issues for ethnic minority staff in the health services). No agency other than People 1st included statistics on vertical under-representation in their post-2010 publications.

Emphasising a business case for diversity is common. No governmental agency or Sector Skills Council explicitly says that the lack of equal representation is unfair, hence supporting the moral case for diversity. Skillset, which aims at 'building a workforce that truly reflects the communities it serves' makes the closest attempt at a moral case for diversity.

While improving the representation of equalities groups is not easy, it is arresting how often post-2010 industry documents only acknowledge the existence of the problem and do not suggest well-formulated, workable solutions. If solutions are proposed, they tend to regard gender imbalances. It seems that where young people are under-represented, calls for increasing the number of new entrants relate to the sector's future and the business case rather than simply to the lack of equal representation. Similarly Apprenticeships - if at all mentioned - are seen as a good way of attracting new young entrants into the sector, rather than as a way of improving equal representation. Skillset are the exception but do not provide an explanation as to why or how it would work. Similarly, Skillset do not note that equality groups are often under-represented in Apprenticeships.

No statement can be found in any of the reviewed documents on the use of public sector procurement for creating Apprenticeships, or about the Equality Act 2010 or Public Sector Equality Duty.

It is perhaps worth noting here that varying under-representation rates *within* a given sector¹ highlights the importance of precise monitoring. It is of concern that such precise data seems to be rarely collected and analysed. The variations also suggest that any potential positive action should be targeted rather than a 'one size fits all' approach. This need

¹ Taking Semta for example, minority ethnic individuals comprise 2% of the sector's workforce in Scotland varying from 0.1% in mature engineering to 7.8% in science industries.

for targeted actions is not noticed, however, in any of reviewed documents.

Last but not least, it should not be forgotten that the way workforce statistics are analysed may be distorting the real scale of under-representation. This is because sector figures are compared with the average for all sectors rather than with the composition in the general population. For example, according to Skillset in 2009 11% of employees in the UK economy were from minority ethnic backgrounds, while according to the Office for National Statistics the proportion of such individuals in the whole of the UK population was 14% in 2011.

Creative Industries

Findings and commentary

While the Scottish Government published an Industry Strategy in 2011, it did not use this as an opportunity to publish an equalities statement. Sector Skills Councils have published statistics showing that women, young people, disabled people and ethnic minorities are under-represented in the workforce. Skillset has recognised that the sector is still a long way from reflecting the population as a whole and furthermore has identified an issue with vertical under-representation. Skillset has put forward a business case for diversifying the sector's workforce (horizontally and vertically) while a moral case for equality has only been hinted at ('building a workforce that truly reflects the communities it serves'). Importantly for this review, Skillset sees Modern Apprenticeships as one of the routes leading to fairer representation, although the Council does not explain why and how exactly this would work. The issue of unequal representation existing within the Modern Apprenticeship cohort is not identified and discussed.

E-Skills is another Sector Skills Council that welcomes the use of Apprenticeships; this however is seen as a tool for increasing the flow of young people into IT & Telecoms rather than a tool for improving workforce diversity. Gender and age under-representation are discussed in e-Skills' publications. Despite the statistics showing that ethnic minorities and disabled people are also under-represented in IT & Telecoms, these groups are not given attention.

Neither the Public Sector Equality Duty nor procurement is mentioned in post-2010 sector publications. No statistics seem to have been collected on faith/belief and sexual orientation. Specific Sector Profiles (covering parts of the sector) only provide statistics for gender, age and disability but not for other strands. Similarly, no statistics are provided when under-representation at managerial level is discussed. Positive action in recruitment is not mentioned.

About the Creative Industries sector

The Scottish Government's definition of the Creative Industries sector includes²:

- Advertising
- Architecture
- Visual art
- Crafts and Antiques
- Fashion and textiles
- Design
- Performing arts
- Music
- Photography
- Film and video
- Computer Games
- Radio and TV
- Writing and Publishing
- Libraries and archives
- Software/electronic publishing
- Cultural education

Summary of key documents

Scottish Government. *Growth, Talent, Ambition - the Government's Strategy for the Creative Industries*. Edinburgh: The Scottish Government, 2011.

² The key sector definitions are based on Standard Industrial Classification (SIC) Codes 2007. For details see <http://www.scotland.gov.uk/Resource/0042/00420853.xls>.

We found no evidence of equality issues being addressed in the Strategy.

HIE. *Sectoral Strategy: Creative Industries*. Inverness: Highlands and Islands Enterprise, 2010.

We found no evidence of equality issues being addressed in the Strategy.

Sector Skills Councils:

Creative and Cultural Skills. *Sector Skills Agreement for the Creative and Cultural Industries: An Analysis of the Skills Needs of the Creative and Cultural Industries in Scotland*. Creative and Cultural Skills, 2011.

This analysis of skills needs contains a socio-demographic profile of workers in the Creative and Cultural Industries. It specifically highlights that in Scotland more men than women work in the industry (60% compared to 40%). With only 1% of the sector from minority ethnic backgrounds, the Scottish creative and cultural industries are not ethnically diverse.

The document also highlights that women are also more likely to earn less money than their male counterparts and continue to find it difficult to progress to higher level jobs: the top jobs still tend to be white and male dominated.

The Agreement claims that the creative and cultural industries are taking a lead in promoting diversity and mobility through agencies such as the Cultural Leadership Programme (CLP), which aims to create opportunities for social minority groups to expand their leadership skills, practice and acumen.

Wavehill Ltd. *Evaluation of the SPFP Creative Apprenticeships Project*. Creative & Cultural Skills, 2011.

We found no evidence of equality issues being addressed in this evaluation.

Creative & Cultural Skills, and Alliance of Sector Skills Councils, Scotland. *Craft, Cultural Heritage, Design, Literature, Music, Performing Arts and Visual Arts: Scottish Sector Profile 2011*. Edinburgh: Alliance of Sector Skills Councils, Scotland, 2011.

This Sector Profile states that compared with the averages for all workplaces in Scotland, the Craft, Cultural Heritage, Design, Literature, Music, Performing, and Visual Arts sectors are characterised by a slightly lower proportion of female employees (45% compared to 48%); a similar proportion of employees with a disability (14%); and a lower proportion of employees in the youngest cohort (9% compared to 14%).

Creative Industries Council Skillset Skills Group. *Report to Creative Industries Council*. Creative Industries Council Skillset Skills Group, 2012.

The report provides a socio-demographic profile of the sector's workforce (UK-wide). It admits that the Creative Industries 'are still a long way from reflecting the population as a whole, with certain groups remaining significantly under-represented'. The proportion of women in the workforce has fallen dramatically from 38% in 2006 to 27% in 2009, while the proportion of people from an ethnic minority background is at 6.7% - this compares to 49% and 11% respectively for the UK's workforce as a whole.

Furthermore, the report notes that women and ethnic minority workers tend to be especially under-represented in the more senior managerial and creative occupations. Importantly, the report states that the creative sector therefore 'risks missing out on talented individuals with the potential to drive innovation, productivity and growth'.

It is observed that apprenticeships are an important tool in the fight against under-representation in the workforce. However, the report admits that overall take-up of apprenticeships in the creative sector is low – less than 1% of creative media businesses have ever offered a formal Apprenticeship. It is proposed that The Creative Industries and the National Apprenticeship Service should lead on a promotional campaign to raise the profile of Apprenticeships.

Skillset, and Alliance of Sector Skills Councils, Scotland. *TV, Film, Radio, Interactive Media, Animation, Computer Games, Facilities, Photo Imaging, Publishing, Advertising and Other Content Creation: Scottish Sector Profile 2011*. Edinburgh: Alliance of Sector Skills Councils, Scotland, 2011.

This sector profile states that compared with the averages for all workplaces in Scotland, the Creative Media sector (covering TV, Film, Radio, Interactive Media, Animation, Content for Computer Games, Facilities, Photo Imaging, Publishing, Advertising, Commercials and Promotions, and Corporate Production) is characterised by a lower proportion of female employees (39% compared to 48%) and a lower proportion of employees with a disability (8% compared to 13%). There is a much lower proportion of employees aged between 16 and 24 years in this sector than across all Scottish economy (4% compared to 14%)

Skillset, and Alliance of Sector Skills Councils, Scotland. *Fashion and Textiles: Scottish Sector Profile 2011*. Edinburgh: Alliance of Sector Skills Councils, Scotland, 2011.

This document mentions that compared to all Scottish employers, those in the Fashion and Textiles sector are characterised by a similar proportion of female employees (46% compared to 48%) and a higher proportion of disabled employees (19% compared to 13%).

Skillset. *Sector Skills Agreement for the Creative Media Industries: Scotland Update 2008-11*. London: Skillset, n.d.

Key workforce statistics covering Scotland is included in the Agreement. With 36% of the workforce being female, 7% aged 16-24, 2% disabled and 2% from minority ethnic background the sector is 'still a long way to go to make it truly inclusive of our society as a whole'.

This Sector Skills Agreement discusses the issue of diversity in the sector in depth. It sets off by stating that a lack of diversity in the workforce is impacting on growing the market. (As such, a business case rather than a moral case for equal representation is put forward). The document outlines the industry's vision to create a skills and learning system for the future where a diverse range of young people aspire to work in the Creative Media Industries, 'building a workforce that more truly reflects the communities it serves'.

The document specifies that what is meant by 'diversity' is socio-economic diversity as much as equal representation with regards to ethnicity, gender, age or disability.

Skillset envisages that one way of achieving workforce diversity would be through increasing the number of Modern Apprenticeships. The Agreement does not explain how and why exactly this would happen. Similarly, no statistics on unequal participation in MAs is presented or discussed.

The issue of under-representation at managerial level is also recognised. One of the aims set out by the Agreement's is to achieve a workforce that reflects the diversity of the population 'at all levels'.

e-skills UK. *Big Data Analytics: An Assessment of Demand for Labour and Skills, 2012-2017*. London: e-skills UK on behalf of SAS UK, 2013.

We found no evidence of equality issues being addressed in this study.

e-skills UK. *Technology Insights 2012 (Scotland)*. London: e-skills UK, 2012.

This publication highlights socio-demographic challenges facing the sector. Specifically, the proportion of 'young people' (those aged 16-24) working as IT & Telecoms professionals in Scotland is far lower than that associated with other occupational groups (7% compared to 14%). Gender also remains a significant and worsening issue and, in 2011, just 17% (compared with 30% in 2001) of IT & Telecoms professionals were female. By contrast, across all other occupations in Scotland, females account for half (50%) of the workforce. The document points at the fact that across all IT related Higher Education courses in Scotland, 87% of acceptances are male and 13% are female.

E-skills is committed to work with partner organisations to galvanise employer investment in young people so that an increasing proportion of young people secure employment in the growing IT & Telecoms workforce, via apprenticeships (among others). E-skills will also work with partner organisations to motivate young women to pursue IT-related education.

e-skills UK, and Alliance of Sector Skills Councils, Scotland. *Software, Internet and Web, IT Services, Telecommunications and Business*

Change: Scottish Sector Profile 2011. Edinburgh: Alliance of Sector Skills Councils, Scotland, 2011.

This Sector Profile states that compared with the averages for all workplaces in Scotland, employers in the Software, Internet, Computer Gaming, IT Services, Telecommunications and Business Change industries covered by e-skills UK are characterised by a lower proportion of female employees (19% compared to 48%); a lower proportion of disabled people (8% compared to 13%); and a lower proportion of employees in the youngest cohort (6% compared to 14%).

e-skills UK. *Technology Counts: IT & Telecoms Insights 2010 (Scotland)*. London: e-skills UK, 2009.

The report contains socio-demographic profile of the Scottish IT & Telecoms workforce. It notices that gender imbalance remains a significant issue for the industry, despite the fact that Scotland has the highest level of female labour market representation (29%). The proportion of workers aged 16-29 has dropped from 34% in 2001 to 21% in 2009. The sector's profile with regards to ethnicity is similar to the Scottish average for all sectors (96% self-identify as White). There are fewer disabled workers in the sector than in the whole of the Scottish economy (9% compared to 13%).

The report states that the IT & Telecoms sector has increasing demands in terms of both the number of people and their skills levels. The document claims that in the context of declining participation in IT-related education, different approaches to attracting people into IT & Telecoms are needed in order to sustain and grow the UK's talent pool. Apprenticeships are not however mentioned in the document.

Other research

The National Skills Academy for IT. *2011 Employer Survey: Insight on IT&T Apprenticeships*. The National Skills Academy for IT, 2012.

We found no evidence of equality issues being addressed in this study.

DC Research Ltd, cogentsi, and Pirnie Ltd. *Economic Contribution Study: An Approach to the Economic Assessment to the Arts & Creative Industries in Scotland*. DC Research Ltd., 2012.

We found no evidence of equality issues being addressed in this study.

Energy

Findings and commentary

While available statistics reveal that three social groups are under-represented in the workforce (women, ethnic minorities and young people), the Industry's focus is dominated by gender imbalances. Looking over the last three years, the Scottish Government has been better focused than Sector Skills Councils in considering under-representation. It is worth highlighting that while the Scottish Government is aware of women being heavily under-represented on science-related Higher Education courses, it also noticed in its update to *2020 Renewable Routemap for Scotland* that 70% of female STEM (Science, Technology, Engineering, and Mathematics) graduates do not work in STEM occupations after graduating.

Under-representation at the managerial level is not mentioned in reviewed publications. Neither Scottish Government nor Sector Skills Councils' post-2010 publications mention apprenticeships in the context of under-representation. Similarly, Public Sector Equality Duty and procurement are not referred to. None of the reviewed documents contains evidence on, or mentions other equality strands: disability, sexual orientation and faith/belief.

About the Energy sector

The Scottish Government's definition of the Energy sector includes:

- Mining of coal and lignite
- Extraction of crude petroleum and natural gas
- Mining support service activities
- Manufacture of coke and refined petroleum products
- Manufacture of other organic based chemicals
- Electricity, gas, steam and air conditioning supply
- Water collection, treatment and supply
- Treatment and disposal of hazardous waste
- Engineering related scientific and technical consulting activities

- Environmental consulting activities

Summary of key documents

The Scottish Government. 'Vision Statement for Scotland's Energy Industry', 2012. <http://www.scotland.gov.uk/Topics/Business-Industry/Energy/resources/working-groups/energy-advisory-board/SEABVision>.

We found no evidence of equality issues being addressed in this Statement.

The Scottish Government. *2020 Renewable Routemap for Scotland – Update*. Edinburgh: The Scottish Government, 2012.

Unlike the original Routemap, this Update contains an Equalities Statement. While it emphasises the role of skills of all under-represented groups and people 'from all walks of life' in unlocking the potential of Scotland's vast natural resources, this Equalities Statement is heavily biased towards the under-representation of women in the workforce.

The Update notes that in Scotland females account for only 17% of those working in the power sector (and additionally they tend to be highly concentrated in administrative & secretarial (ca. 70%) and sales & customer service (ca. 50%) roles). While this is partly explained by the fact that women are under-represented in STEM education programmes, the document highlights the fact that 70% of female STEM graduates do not work in STEM occupations after graduating.

The Update emphasises the need for more women to be equipped with the necessary skills and experience to fill vacancies in the sector. This means that women must have equal access to and receive education in areas important to the energy sector.

The document recognises that achieving equality in an emerging sector is a challenge, which the Scottish Government and its partner agencies, and indeed the renewable energy industry, must take on. Particularly, the Update states that The Scottish Government is aware that monitoring of equality groups across the sector is limited at present. Such monitoring is the key to a greater understanding of barriers to entering the sector. In the Update, the Scottish

Government commits itself to working with key stakeholders to monitor the numbers of women and all minority groups entering the sector, and to publishing these findings annually as part of the update to the 2020 Routemap for Renewable Energy in Scotland.

The Scottish Government. *2020 Routemap for Renewable Energy in Scotland*. Edinburgh: The Scottish Government, 2011.

We found no evidence of equality issues being addressed in this Routemap.

SDS. *Skills Investment Plan for the Energy Sector*. Skills Development Scotland, 2011.

The Plan notes skills shortages in the engineering sector and calls for increasing the number of apprenticeships.

We found no evidence of equality issues being addressed in the Plan.

Scottish Enterprise. *Oil and Gas Strategy 2012-2020*. Oil & Gas Industry Leadership Group, n.d.

The Strategy highlights the need to increase the flow of young people into the sector.

We found no evidence of equality issues being addressed in the Strategy.

Sector Skills Councils:

Cogent, and Alliance of Sector Skills Councils, Scotland. *Chemicals, Pharmaceuticals, Nuclear, Oil and Gas, Petroleum and Polymer Industries: Scottish Sector Profile 2011*. Edinburgh: Alliance of Sector Skills Councils, Scotland, 2011.

Compared with the averages for all workplaces in Scotland, the Chemicals, Pharmaceuticals, Nuclear, Oil and Gas, Petroleum and Polymer sectors are characterised by a much lower proportion of female employees (24%) and a similar proportion of employees with a disability (12%). The age composition is similar to the averages for all Scottish employers.

Energy & Utility Skills, and Alliance of Sector Skills Councils, Scotland. *Gas, Power, Waste Management and Water Industries: Scottish Sector Profile 2011*. Edinburgh: Alliance of Sector Skills Councils, Scotland, 2011.

Compared with the averages for all workplaces in Scotland, the Gas, Power, Waste Management and Water Industries sectors are characterised by a lower proportion of female employees (20% compared to 48%); a lower proportion of employees aged 16-24 (11% compared to 14%); and a slightly lower proportion of employees with a disability (11% compared to 13%);

Other research

The Scottish Parliament. *Report on the Achievability of the Scottish Government's Renewable Energy Targets*. Edinburgh: The Scottish Parliament, 2012.

The report highlights that more work needs to be done to address the lower than desirable take up of STEM subjects in schools, universities and colleges particularly where young women are concerned.

Murphy, Rob, Steve Bennett, and Andy Challis. *Energy Production and Utilities: Sector Skills Assessment 2012*. London & Rotherham: The UK Commission for Employment and Skills, 2012.

This Skills Assessment provides UK-wide workforce statistics for the energy sector. The energy sector across each nation employs around half the proportion of under-25s (just seven per cent of its workforce) compared to 13% of the entire workforce in each nation. This is largely a reflection of restrictions placed on employers with regards to young people operating plant and machinery (this applies across most aspects of the energy sector, particularly the extractives and mineral processing industries and waste management).

Males account for 81% of total employment in the energy sector, compared to 54% across the whole economy. Over the last decade the proportion of females working in the energy sector has reduced by nearly two percentage points. This, however, hides the real extent of the gender split as it includes the non-technical workforce. Data taken from Energy & Utility Skills' Register (EUSR) schemes show

that of the 125,000 workers registered across the electricity, gas and water industries, almost 122,000 (97%) are male.

The energy sector employs the second lowest proportion of people from black or minority ethnic groups of all 15 SSA sectors in the UK at just four per cent. This is less than half of the nine per cent all economy average.

The number of young people entering the labour will decrease slowly over the next decade, so all sectors of the economy will be fighting for a smaller number of new entrants. The technical and engineering workforce in the energy sector, and across the economy as a whole, is older than average and this will result in high levels of replacement demand.

Forrest, Nick, and Jamie Wallace. *The Employment Potential of Scotland's Hydro Resource*. Edinburgh: Nick Forrest Associates Ltd., 2009.

We found no evidence of equality issues being addressed in this analysis.

Financial and Business Services

Findings and commentary

Available statistics published by Financial Skills Partnership suggests that the workforce in the Financial Industry reflects the wider working population in terms of age structure and disability. The industry has not commented on the fact that overall women are overrepresented by 11 percent points. Considering that the public image of the boardroom composition in this sector is 'male and White', it is of concern that no statistics have been published on the extent to which various equality groups are represented at managerial and senior managerial level.

There are also further significant gaps in statistical evidence. No statistical data seems to have been collected by the Government or Sector Skills Councils on participation of ethnic minority employees in the workforce. Similarly, no statistics has been published on sexual orientation and faith/belief.

About the Financial and Business Services sector:

The Scottish Government's definition of the Financial and Business Services sector includes:

- Monetary intermediation
- Trusts, funds and similar financial entities
- Other financial service activities, except insurance and pension funding
- Insurance, reinsurance and pension funding, except compulsory social security
- Activities auxiliary to financial services and insurance activities
- Legal activities
- Accounting, bookkeeping and auditing activities; tax consultancy
- Management consultancy activities
- Other engineering activities (not including engineering design for industrial process and production or engineering related scientific and technical consulting activities)
- Market research and public opinion polling
- Translation and interpretation activities
- Activities of employment placement agencies (other than motion picture, television and other theatrical casting) n.e.c.
- Other human resources provision
- Office administrative and support activities
- Activities of call centres
- Organisation of conventions and trade shows
- Activities of collection agencies and credit bureaus
- Other business support service activities n.e.c.

Summary of key documents

The Scottish Government. *The Strategy for the Financial Services Industry in Scotland: Seventh Annual Report April 2011 - March 2012*. Edinburgh: The Scottish Government, 2012.

The industry is showing increased interest in Modern Apprenticeships. During 2011/12 there were 775 Modern Apprenticeship new starts within the industry. This compares with a total of 692 for 2010/11. This data has not been disaggregated by equality strands.

We found no evidence of equality issues being addressed in the Strategy.

HIE. *Sectoral Strategy: Financial and Business Services*. Inverness: Highlands and Islands Enterprise, 2010.

We found no evidence of equality issues being addressed in the Strategy.

Sector Skills Councils:

Financial Skills Partnership, and Alliance of Sector Skills Councils, Scotland. *Finance, Accountancy and Financial Services: Scottish Sector Profile 2011*. Edinburgh: Alliance of Sector Skills Councils, Scotland, 2011.

Compared to all Scottish employers, the Accountancy and Finance, Banking and Building Societies, Financial Planning, Insurance, Investment Management and Pensions sectors are characterised by a higher proportion of female employees (59% compared to 48%); a similar proportion of employees with a disability; and a slightly lower proportion of employees between the ages of 16 and 24 (12% compared to 14%).

Food & Drink

Findings and commentary

Despite evidence of under-representation of women and disabled people in the workforce, post-2010 Food & Drink Industry statements suggest that equalities are not prioritised. No statistics have been published post-2010 on ethnicity, sexual orientation and faith/belief.

Neither under-representation at managerial level nor the Equality Act 2010 are mentioned in reviewed publications.

About the Food & Drink sector

The Scottish Government's definition of the Food & Drink sector includes:

- Crop and Animal Production, Hunting and Related Service Activities
- Fishing and Aquaculture
- Manufacture of Food Products
- Manufacture of Beverages

Summary of key documents

The Scottish Government. *Measuring the Success of Scotland's National Food and Drink Policy. Food and Drink Indicators. Update on Progress*. Edinburgh: The Scottish Government, 2012.

We found no evidence of equality issues being addressed in this Update.

SDS. *Skills Investment Plan for Scotland's Food and Drink Sector*. Skills Development Scotland, 2012.

The Plan recognises the need for a flow of new young entrants into the industry. Equality issues and under-representation are not mentioned.

HIE. *Sectoral Strategy: Food and Drink*. Inverness: Highlands and Islands Enterprise, 2010.

We found no evidence of equality issues being addressed in the Strategy.

The Scottish Government. *Measuring the Success of Scotland's National Food and Drink Policy: Summary of Overall Approach to Monitoring and Evaluation*. Edinburgh: The Scottish Government, 2010.

We found no evidence of equality issues being addressed in this analysis.

HIE. *Food & Drink Strategic Masterplan – Roadmap to 2014*. Inverness: Highlands and Islands Enterprise, n.d.

We found no evidence of equality issues being addressed in the Strategy.

Industry Leadership Groups:

Scotland Food & Drink. *Action Plan 2011-2015 (Version 2 – February 2012 – Updated August 2012)*. Scotland Food & Drink, 2012.

We found no evidence of equality issues being addressed in this Action Plan.

Scotland Food & Drink. *Fresh Thinking*. Edinburgh: Scotland Food & Drink, 2010.

This document points at skills shortages within the sector and puts forward a business case for bigger investment in training. Equality issues and under-representation are not mentioned.

Sector Skills Councils:

Improve, and Alliance of Sector Skills Councils, Scotland. *Food and Drink Manufacturing: Scottish Sector Profile 2011*. Edinburgh: Alliance of Sector Skills Councils, Scotland, 2011.

Compared to all Scottish employers, the Food and Drink Manufacturing and Processing sectors are characterised by a lower proportion of female employees (35% compared to 48%); a slightly lower proportion of staff aged under 25 years; and a lower proportion of employees with a disability (8% compared to 13%).

Life Sciences

Findings and commentary

The Scottish Government has not published an industry statement post-2010. Sector Skills Councils' publications have recognised gender imbalances, low flow of young people into the Industry, as well as low

participation rates for ethnic minorities in some areas of the industry (e.g. mature engineering). None of the reviewed publications provides evidence on, or mentions sexual orientation or faith/belief.

By calling for a review of recruitment practices, Semta's Skills Assessment (covering Biosciences) is the only publication that engages with positive actions towards improving equal participation of under-represented groups in the sector's workforce. Apprenticeships are only mentioned in one Review, in the context of upskilling the workforce.

Under-representation at managerial level is mentioned only in the area of health services. Equality Act 2010, Public Sector Equality Duty and procurement are not referred to in any of the reviewed publications.

About the Life Sciences sector

The Scottish Government's definition of the Life Sciences sector includes:

- Manufacture of basic pharmaceutical products and pharmaceutical preparations
- Manufacture of irradiation, electromedical and electrotherapeutic equipment
- Manufacture of medical and dental instruments and supplies
- Research and experimental development on biotechnology
- Other research and experimental development on natural sciences and engineering

Summary of key documents

Sector Skills Councils:

Semta, and Alliance of Sector Skills Councils, Scotland. *Science, Engineering and Manufacturing Technologies: Scottish Sector Profile 2011*. Edinburgh: Alliance of Sector Skills Councils, Scotland, 2011.

Compared to all Scottish employers, the Science, Engineering and Manufacturing Technology sectors are characterised by a much lower

proportion of female employees (18% compared to 48%); a similar proportion of employees with a disability; and a lower proportion of young people.

Semta. Sector Skills Assessment for Science, Engineering and Manufacturing Technologies. Semta, 2011.

Compared with all sectors, employers in the Semta footprint are more likely to experience skill gaps (18% compared to 15%).

For Semta's sectors in Scotland there is expected to be a net requirement for over 9,600 people with intermediate and higher level qualification (SVQ Level 3 plus or equivalent) over the period 2010 to 2016. In relation to lower level qualifications, there is expected to be a net requirement for around 2,800 people qualified at SVQ Level 2 and 2,250 people qualified at SVQ Level 1. It is important that these new entrants are upskilled to meet the needs of the jobs they are going to fulfil if Semta's sectors in Scotland are going to increase their competitiveness.

20% of Semta's workforce in Scotland is female compared to 49% for all sectors in Scotland. 10% of Semta's workforce in Scotland is aged 16-24 compared to 14% for all sectors in Scotland. 13.9% of Semta's workforce in Scotland has some sort of disability compared to 13.8% for all sectors in Scotland. 2.0% of Semta's workforce in Scotland is from an ethnic minority compared to 2.9% for all sectors in Scotland. (With regards to ethnicity, there are wide variations by Semta sectors, ranging from 7.8% of the workforce in the science industries being from ethnic minorities to a very small proportion in the mature engineering sectors).

The Assessment puts equity as one of its strategic priorities: 'To provide the opportunity for everyone to contribute to sustainable economic growth'.

The Assessment identifies widening female participation as one of twelve key issues. It also notes that the number of young people entering Semta's sectors has been an issue for a number of years.

Semta is one of a small number of Sector Skills Councils to be funded through the Women in Work Sector Pathways Initiative, to support employers develop their female staff. The programme has helped over six hundred women achieve individual career goals; and helped

companies to improve their culture and performance. A number of companies have established women's networks to sustain the successes achieved as a result of the programme.

Semta. *Science Industries (Bioscience): Sector Skills Assessment UK*. Semta, 2010.

Across the UK, 46% of the UK Science Industry workforce is female. 12% of the UK Science Industry workforce had some sort of disability (against the average of 14%). 8.7% of the UK Science Industry workforce is non-white. (44% of all FE learners in England enrolled on courses relating to the Science Industry in 2008/09 were non-White). 7% of the UK Science Industry workforce is aged 16-24 compared with 13% in all sectors in the UK.

The document highlights the need to increase investment in skills for the existing workforce. It is also stated that the age of the existing workforce will provide significant replacement challenges.

The Assessment calls for a review of existing recruitment practices to realise opportunities for recruitment from ethnic minority groups and older workers from other sectors of the economy.

Cogent, Semta, and Skills for Health. *Life Sciences & Pharmaceuticals: A Future Skills Review with Recommendations to Sustain Growth in Emerging Technologies*. Cogent, Semta and Skills for Health, 2009.

The Review highlights the vital importance of a secure supply of higher level skills from Higher Education, especially those in the physical and life sciences. There is evidence that the scientific and technical occupations are hardest to fill, and that employers articulate significant skill gaps in this workforce. In the future there will be significant levels of skills gaps and hence a requirement for significant workforce development.

In this context the Review recommends that targeted technical Apprenticeships and Higher Apprentices should be facilitated.

Skills for Health. *Scotland Skills and Labour Market Intelligence Assessment 2011*. Bristol: Skills for Health, n.d.

The proportion of the workforce aged 16-24 years is slightly less than those employed in the whole economy in Scotland. This is most likely due to the time taken to qualify for specialist roles. Indeed many opportunities for young people aged between 16 and 21 are limited to administrative and clinical support roles.

With 82% of the workforce female, the health sector has a greater proportion of the workforce that is female when compared to the whole economy.

6% of workers employed in the health sector in Scotland are non-White, twice the rate for the whole Scottish economy. The Assessment adds, however, that available evidence points at issues ethnic minority workers face with progressing within the sector and reaching their full potential.

Alliance of Sector Skills Councils, Scotland. *Science and Engineering Cluster Report: Scottish Sector Profile 2011*. Edinburgh: Alliance of Sector Skills Councils, Scotland, 2011.

Compared with the averages for all workplaces in Scotland, the Science and Engineering “Cluster” is characterised by a lower proportion of female employees (32% compared to 48%), a similar proportion of employees have a disability (12%) and a lower incidence of younger staff (16 to 24 years old).

Industry Leadership Groups:

Life Sciences Scotland. *Scottish Life Sciences Strategy 2011*. Life Sciences Scotland, n.d.

We found no evidence of equality issues being addressed in the Strategy.

Life Sciences Scotland. *Scottish Life Sciences: 2010 Review*. Life Sciences Scotland, n.d.

We found no evidence of equality issues being addressed in the Review.

Sustainable Tourism

Findings and commentary

Seen against other industries described in this report, the tourism sector is unusual in that its workforce comprises a very high proportion of young workers (46% below the age of 30). The over-representation of women is slightly less pronounced with 56% of employees being female (although it varies from one sub-sector to another, with for example 71% of staff working in travel services are female).

The main Sector Skills Council for the tourism industry, People 1st, has widely recognised the shortage of management skills and under-representation of women at senior managerial level. The Council has put forward a business case for a more balanced representation of genders at senior managerial level.

The sector employs a fair proportion of workers from ethnic minority backgrounds. It is of concern however that neither People 1st nor other agencies have published data on how well individuals from ethnic minorities are represented at the managerial and senior managerial level.

None of the reviewed documents contains evidence on the extent to which disabled people, LGBT people and people of various faith/belief are represented in the workforce. It is equally concerning that several industry documents published in the past three years do not mention equalities at all.

About the Sustainable Tourism sector

The Scottish Government's definition of the Sustainable Tourism sector includes:

- Hotels and similar accommodation
- Holiday and other short-stay accommodation
- Camping grounds, recreational vehicle parks and trailer parks
- Restaurants and mobile food service activities
- Beverage serving activities
- Tour operator activities
- Other reservation service and related activities

- Museum activities
- Operation of historical sites and buildings and similar visitor attractions
- Botanical and zoological gardens and nature reserve activities
- Operation of sports facilities
- Other sports activities (not including activities of racehorse owners)
- Activities of amusement parks and theme parks
- Other amusement and recreation activities

Summary of key documents

Scottish Enterprise. *Tourism Strategy Refresh: Tourism Leadership Group Industry Analysis*. Edinburgh: Scottish Enterprise, 2012.

We found no evidence of equality issues being addressed in the Strategy.

HIE. *Sectoral Strategy: Tourism*. Inverness: Highlands and Islands Enterprise, 2010.

We found no evidence of equality issues being addressed in the Strategy.

SDS, and The Scottish Tourism Alliance. *Skills Investment Plan for Scotland's Tourism Sector*. Glasgow: Skills Development Scotland and the Scottish Tourism Alliance, n.d.

We found no evidence of equality issues being addressed in the Plan.

Sector Skills Councils:

People 1st. *State of the Nation Report 2013: Scotland Executive Summary*. People 1st, 2013.

The sector employs a young workforce in Scotland where almost half (46%) are aged under 30.

People 1st. *Sector Skills Assessment for the Hospitality, Leisure, Travel and Tourism Sector 2010*. People 1st, 2010.

With regards to the sector's workforce characteristics in Scotland, 61% of the workforce are female; 46% of the workforce are aged under 30; and 7% are from a Black or Minority Ethnic background (15% are born overseas).

The uneven gender split at a managerial level has been an area of particular focus for People 1st and the industry.

People 1st. *An Inspiration Skills Legacy*. People 1st, n.d.

The industry faces a chronic management skills shortage with 32% of employers in Scotland stating that strategic management skills need to improve within their current workforce. In hospitality, travel and tourism across the UK, 310,000 women leave the sector each year costing businesses £2.8 billion, and only six% of board positions are held by women. In passenger transport, around 30% of workers are over the age of 50. Gender imbalance and an over-reliance on an ageing or very young workforce is hampering potential.

Women 1st. (2010). *The case for change: women working in the hospitality, leisure, travel and tourism industry*. Women 1st.

The report provides detailed gender-related statistics for the sector, focusing specifically on the under-representation of women at senior management positions. The gap between the proportion of male and female workforce employed as senior managers is 7.3% (25% compared to 17.7%). Translated into absolute numbers, this means that the sector loses 110,000 women between operational and managerial levels. Further analysis by age reveals that particularly women of child rearing age (between 25 and 45) are under-represented.

The analysis quotes findings of research conducted by People 1st in 2010 which concluded that the following five barriers appear to be the most significant in preventing women's advancement to senior roles:

- Difficulty of combining work at senior level with caring responsibilities
- Dominant masculine organisational culture
- Preconceptions and gender bias
- Lack of networking and exclusion from informal networks of communication
- Lack of visible women in senior positions.

The report puts forward a business case for more balanced representation of genders at senior managerial level, quoting evidence of improved business performance.

Industry Leadership Groups:

The Tourism Leadership Group. *Towards a Strategy for Tourism in Scotland: Summary of Key Findings of Phase 1 - June 2011*. The Tourism Leadership Group, 2011.

We found no evidence of equality issues being addressed in the Strategy.

Other research

STA. *Tourism Scotland 2020: The Future of Our Industry, in Our Hands*. The Scottish Tourism Alliance, 2012.

We found no evidence of equality issues being addressed in the Strategy.

STA. *TS 2020 Strategy Update*. The Scottish Tourism Alliance, 2013.

We found no evidence of equality issues being addressed in this Update.

Universities

Findings and commentary

Post-2010 sector statements recognise equality issues within Scottish Universities both as employers and as providers of education. As for the former, the Scottish Government has identified the lack of diversity within Universities' governing bodies, but has not provided any statistics and has formulated a specific action only in relation to gender. No statistics have been provided on the extent to which other equalities groups (age groups, ethnic minorities, sexual minorities, disabled people and faith/belief groups) are represented amongst Higher Education staff.

As for the role of Universities as providers of education, the Scottish Government has set itself the goal of ensuring equity of access to Higher Education. Progress with support for people with disabilities to access Higher Education has been noted as well as the fact that gender imbalances within STEM disciplines (Science, Technology, Engineering, and Mathematics) continue to pose a challenge from an equalities perspective. It is of concern that no other equality statistics regarding students has been included in publications by the Scottish Government or Universities Scotland since early 2010.

Summary of key documents

The Scottish Government. *Report of the Review of Higher Education Governance in Scotland*. Edinburgh: The Scottish Government, 2012.

The report calls governing bodies in the HE sector to observe the principles of gender balance and of diversity. It prescribes that each governing body should be required to ensure that at least 40% of the membership is female. Each governing body should also ensure that the membership reflects the principles of equality and diversity more generally, reflecting the diversity of the wider society.

The Scottish Government. *2020 Renewable Routemap for Scotland – Update*. Edinburgh: The Scottish Government, 2012.

Women are under-represented in STEM education programmes. In the UK, in 2007-2008, 33.4% of higher education graduates in STEM disciplines were female. In 2009, the proportion of female PhDs in engineering, manufacturing, and construction was only 25%. The percentage of women PhD graduates in science, mathematics and

computing was 41%, as opposed to 52% in humanities and arts and 64% in education.

The Scottish Government. *Building a Smarter Future: Towards a Sustainable Scottish Solution for the Future of Higher Education*. Edinburgh: The Scottish Government, 2010.

In this strategic document the Government states that Scotland must work towards a system which provides equity of access to the higher education system and assists students who are in most need of support.

With regards to disability, the document states that the number of students in receipt of Disabled Students Allowance (DSA) has increased in each academic year since 2002-2003. In 2008-2009, 4,065 students received DSA - this is 99.3% higher than in 2002-2003 and 12.1% higher than in 2007-2008.

Other research

Universities Scotland. *Delivering for Scotland: University Outcome Agreements 2012-13*. Universities Scotland, 2012.

We found no evidence of equality issues being addressed in these Outcome Agreements.

Universities Scotland. *Scotland's Creative Economy: The Role of Universities*. Universities Scotland, 2010.

We found no evidence of equality issues being addressed in this analysis.

Appendix: Current Industry Leadership Groups in Scotland

- Aerospace Defence and Marine
- Construction Scotland
- Chemical Sciences Scotland
- Scottish Energy Advisory Board
- Renewables Industry Advisory Group
- Carbon Capture and Storage and Thermal Generation Advisory Group
- Oil and Gas Industry Leadership Group
- Digital Media Advisory Group
- Scottish Forest and Timber Technologies Advisory Group
- Financial Services Advisory Board (FiSAB)
- Scottish Textiles Forum
- Tourism Leadership Group
- Life Sciences Advisory Board – LISAB
- Technology Advisory Group
- Scotland Food and Drink