



Logistics Report

Prepared by
Skills for Logistics

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Skills for
Logistics

SEMLEP

South East Midlands
Local Enterprise Partnership



Foreword

This is the first SEMLEP Logistics report produced in conjunction with Skills for Logistics alongside contributions from our wider partnership. By gaining an understanding of the current logistics business performance in the South East Midlands area, we have developed our objectives and principal actions for the next few years.

Logistics is now recognised by companies as being a key part of competitive advantage. Effective logistics management can both improve customer service and reduce costs. There is not a clearly defined logistics sector. Rather, logistics involves the integration of a wide range of functions within companies and between them. Therefore, demand for warehousing/distribution land and floor space comes from a wider range of economic sectors, with retailers, manufacturers and third party logistics contractors being among the main drivers of demand.

Logistics is a sector which offers lifelong opportunities and fulfilling careers. Likewise, it quite literally supports the UK economy. It seems impossible that we can have a strong UK plc without ensuring we have a world class UK Logistics Sector. In a key logistics hotspot such as South East Midlands, it is crucial that we get it right.

It is essential that our partners and companies take this report forward and make our future for the Logistics sector better. We are excited about the recommendations and invite all to comment.



Paul Brooks
Chairman
Skills for Logistics



Councillor Mary Clarke
Leader South Northamptonshire Council
SEMLEP Board Director

Executive Summary

This report highlights the importance of the Logistics Sector in the South East Midlands (SEM). Perhaps initially because of its geography, SEM is now a key area for the UK Logistics Sector.

This report shows that whilst there is much to celebrate, the economic performance of local employers can be strengthened further. Likewise, as a big SEM employer with both skills gaps and shortages, the Logistics Sector should be a key way to address issues of worklessness in our local communities.

In our report we identify three high level areas which will serve to improve the economic wellbeing of the individuals and employers in the SEMLEP area vis a vis the Logistics Sector as a whole.

Attract

It is clear that the Logistics Sector needs to work smarter when it comes to attracting new entrants. This is clearly a sector needing new blood and increased levels of talent and competence. Too few people see the Logistics Sector as an option for themselves or family members. Research clearly shows that there are job vacancies even now which adversely affects performance. Likewise, it is apparent that the Logistic Sector can offer a wide variety of interesting and well paid career pathways. As of yet, the Logistics Sector does not engage with individuals in an optimal way. We recommend a portfolio of projects directly aimed at attracting new recruits into the sector. These projects will ensure not just a shift in age profile, but also improvements in gender and minority representation. Likewise, these projects should seek to engage those with pre-existing logistics training such as those leaving the military and ex-offenders who often leave the sector taking with them formal qualifications and important experience.



Develop

Employers continue to be sceptical of the training offer made by the state. There is a commonly held perception that people arrive for interview with lots of qualifications but without being work ready. Consequently, we recommend addressing this gap without delay. Developing people so they can enter sustainable employment has numerous spill-over effects in many different areas. As above, this is not a one size fits all approach. Supporting people into work makes good sense on so many levels.

But there is a need to develop people so they can progress up the career ladder, as without support it is clear that too many people can find themselves at a career dead end. There is plenty of evidence to suggest that people who begin in the Logistics Sector can become stuck and instead leave the sector taking their skills and experience with them.

Support

The skills and training system often feels perplexing to a non-specialist - a system of funding and acronyms seemingly developed without the end user in mind. Consequently, even when an employer or individual is minded to seek training, the experience can be so gruelling that they may become disillusioned to the extent that they turn their back. This cannot be allowed to continue. We recommend both increasing the demand for skills but also ensuring that demand can be supported at all stages.

SEM is already a key area for the Logistics Sector. We can build on this critical mass and drive improvements which have economic and social benefit. Many good things are already happening here, but experiences brought from other areas of the UK can deliver lasting improvements. The evidence in this report points squarely to the three packages highlighted above.

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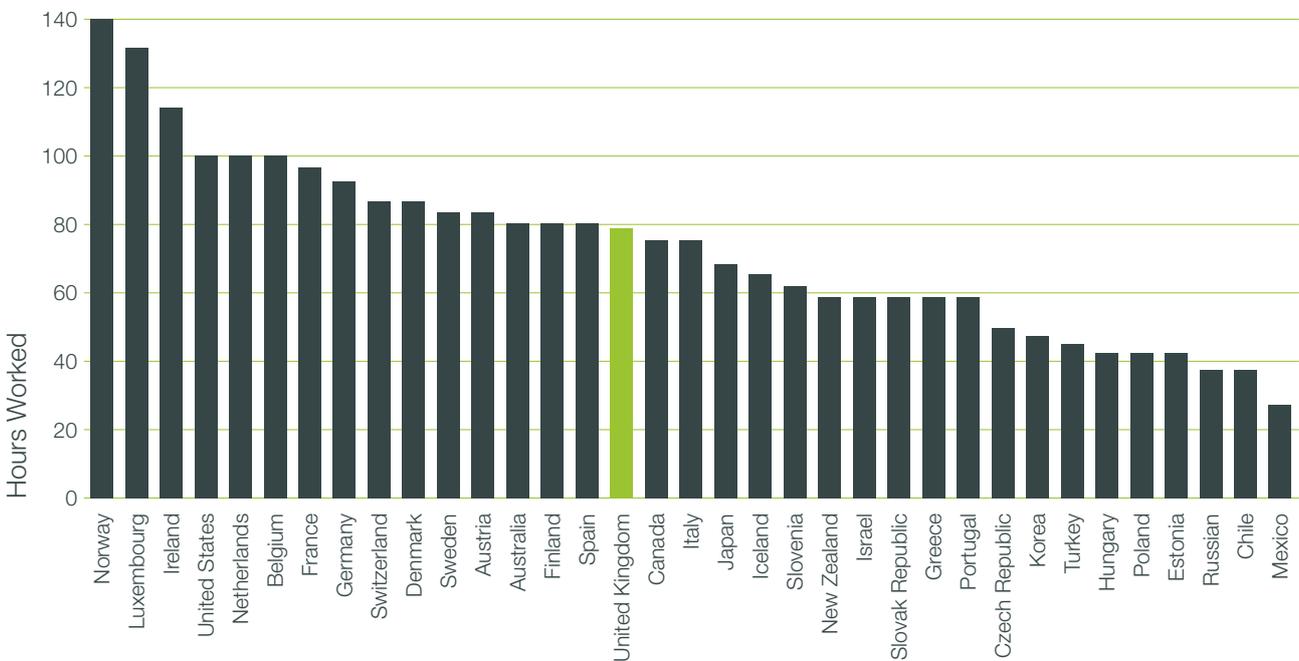
1. Introduction

1.1 The Economic Challenge

The economic climate continues to be a dominant influence on all our lives. There are several factors which shape the performance of an economy, such as technology, natural resources etc. Of note is the underpinning role that skills play in economic growth, particularly in the sense of the value and contribution of ‘human capital’. Simply put, the productivity of a workforce has a significant impact on the bottom line. Relatedly, the productivity and hence the profitability of a workforce is also a factor which makes an economy attractive to investors. In 2011, the UK received \$51 billion in Foreign Direct Investment (FDI), less than many of our competitors. By comparison, even a small nation such as Belgium attracted \$103 billion worth of inward investment (OCED, 2013).

In terms of productivity the UK lags behind our comparator nations. The average French worker produces 19 per cent more per hour than the average UK worker, the average German worker 16 per cent more and the average US worker 22 per cent more (Figure 1).

Figure 1 Relative GDP per hour worked as % of USA (USA = 100) (2011)



Source: OECD.StatExtracts

1.2 Importance of Logistics

In 2006 the European Commission reported that: The global logistics industry is estimated at roughly €5.4 trillion, or 13.8 per cent of the global GDP, with logistics costs, on average, accounting for 10-15 per cent of the final cost of the finished product (Europa, 2010). However, many outside the industry fail to recognise the central importance of logistics - all dimensions of the UK economy rely on logistics. The sector is responsible for an eighth of total global output. To improve the domestic Logistics Sector is to improve the overall competitiveness of the nation.

Danny Leipziger, the World Bank vice-president for poverty reduction and economic management has commented that, **“Being able to connect to global markets is fast becoming a key aspect of a country’s capacity to compete, grow, attract investment, create jobs and reduce poverty”**.

Similarly, Uri Dadush, World Bank trade director has remarked, **“As a main driver of competitiveness, logistics can make you or break you as a country in today’s globalised world”**. (*Logistics Manager, 2007*).

One of the intrinsic properties of the logistics market is that it is a service market, where consumption cannot be decoupled from production and delivery activities. The sector operates 24 hours a day, 7 days a week and 365 days of the year. Logistics operates on a global scale, underpinning all other sectors in the economy. Firms may operate either as own account (carry own goods) or hire and reward (where you carry other people’s goods).

In the UK, the Logistics Sector employs 2.2 million people, representing 8 per cent of the UK’s workforce (Office for National Statistics, 2013). The sector has approximately 190,000 companies operating, with a turnover of £948bn and an approximate GVA of £100bn – 28 per cent and 10 per cent of the total economy respectively.

While logistics activities are undertaken across the UK, there are distinct ‘hotspots’ of logistics developments (i.e. warehousing), meaning that employment and jobs are likewise found in specific areas. Logistics hotspots tend to be found in areas supported by high levels of manufacturing, where there is a large population base, and in areas close to a main port or distribution hub receiving goods from outside of the UK, which are then redistributed. It is a critically important enabler of the success of other businesses of all sizes and sectors – from corner shops to supermarkets, manufacturers to ebay entrepreneurs and energy companies to waste businesses.

A recent study on Logistics Performance rated the UK’s performance as 10th, with many European competitors above us (The World Bank, 2012). Using this data together with the Global Competitiveness Report (GCR), the underlying factors explaining that performance can better be understood (World Economic Forum, 2013).

According to the GCR the quality of education and training is crucial for domestic economies wanting to move up the value chain beyond simple production processes and products. In particular, today’s globalised economy requires pools of well-educated workers who are able to adapt rapidly to their changing environment.

But the UK is not one of the best performing countries with regard to education and training. We particularly underperform when it comes to the extent of staff training (ranking of 28th in 2010-11) (World Economic Forum, 2013).

We know that the UK Logistics Sector is poorly qualified – 44 per cent do not hold a Level 2 qualification. Looking closer at the occupational skills needs tells a further story: 63 per cent of all machine operatives (drivers) are not qualified to minimal skills level, nor are 55 per cent of elementary occupation (warehouse operatives, postal workers, couriers) and nor are 52 per cent of managers. This has important adverse effects on our productivity and should be resolved.

1.3 Importance of Skills

The UKCES published their *Ambition 2020: World Class Skills and Jobs for the UK* in 2010 (UKCES, 2010). This provided an assessment of how well the UK was doing and what was needed to achieve the ambition to be world class in employment and skills by 2020. Here it is reiterated that productivity and jobs are vital to prosperity.

Upskilling the UK workforce would bring significant benefits to the economy, businesses and individuals. Staff training brings bottom-line benefits for businesses and it has been demonstrated that organisations that train their staff increase the likelihood of surviving. From an individual's perspective, having a strong skill set reduces the chance of unemployment and there is a positive correlation between wages and qualifications.

“Skills are expected to be a driver of future growth for many parts of the economy”. (Giles, 2010)

Productivity is increasingly being driven by skills (Moloney, 2011). For firms to succeed in the face of growing competition, they must be able to draw upon a skilled labour force. Skilled workers are better able to adapt to new technologies and market opportunities. Higher skill levels drive innovation, facilitate investment and improve leadership and management. Firms must, therefore, be able to draw on a flexible and skilled workforce if innovation is to be implemented effectively.

Yet we are not achieving the basic minimum for many school leavers. In 2011, only 60 per cent of pupils achieved at least a C grade in both English and Maths GCSE, and almost one in every 20 pupils in maintained mainstream schools failed to obtain a C grade in any subject. Of further concern is that nearly one in four of the working age population are not functionally numerate, and almost one in six do not have functional literacy skills (Heseltine, 2012). Furthermore, less training is certified in the UK when compared to other EU nations and training also accounts for a lower proportion of labour costs compared to the EU average (Stanfield, 2009).

The UKCES reviewed the range of levers designed to encourage employers to train on a collective basis (Collective Measures) and proposed that inter-employer networks are likely to be the most effective mechanism for enhancing training for the benefit of the firm and overcoming a number of barriers, such as cost of training and information imperfections (Stanfield, 2009). Tools that assist with employer decision making around training may enhance formation by breaking down barriers related to a lack of information about training and the benefits of training are also advised. The report also highlights that networks need a dedicated champion with the skills and credibility to assemble and co-ordinate the involvement of partners, such as training providers and employers.

Table 1 opposite provides a summary of the benefits of upskilling to the economy, business and an individual.

Table 1 The potential benefits of upskilling

Benefits

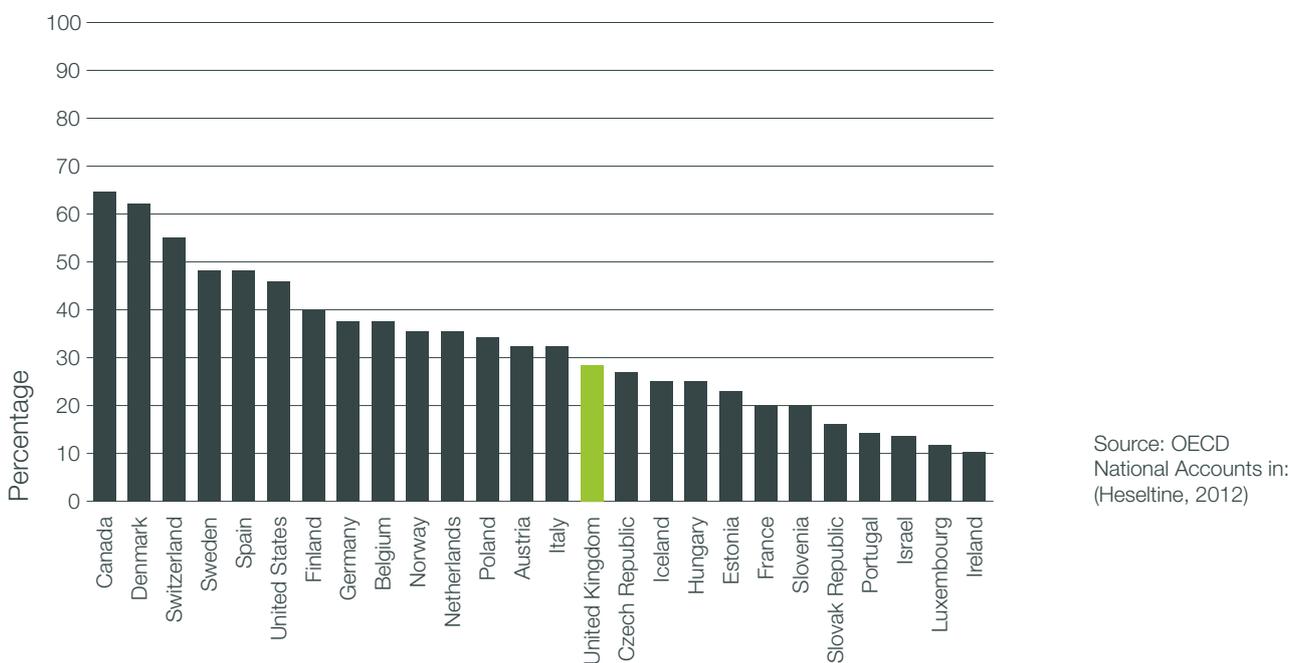
Economy	<ul style="list-style-type: none"> - Leitch (2006) estimated that increases in skills in the UK workforce in the past 10 years, increased GDP by between £30 and £50 billion - Up to 20% of annual growth between 1975 and 2002 was attributable to workforce skills (Bell et al, 2005) - Increased productivity (Garrett, Campbell and Mason, 2010) - The rate of return for the state up to 13% of educating an individual to degree level (PriceWaterhouseCooper, 2005) - Improved economic growth (Barro, 1991; 1997); (Sianesi and Van Reensen, 2003) - Increased innovation (Tether et al, 2005) - The link between health and education (Groot & Maassen van den Bink, 2007) - Increased education has been linked with a reduction in depression (Feinstein et al, 2008), increased life satisfaction, increased level of exercise and decrease in the likelihood of smoking (Feinstein & Hammond, 2004) - Parents' education is positively associated with how their children perform at school (Sabates, 2008)
<hr/>	
Businesses	<ul style="list-style-type: none"> - Increases productivity and profitability (Barrett & O'Connell, 2001) - Businesses that train their staff are more likely to survive (Collier et al, 2005; 2007) - Increased retention of staff (Dex & Smith, 2001) - Presence of skills among other staff can have a spillover effect (Heuermann et al, 2009) - Carriou and Jeger, (1997) found that a 1% increase in training spending delivered a return of 2% in additional value - Organisations are benefiting at twice the rate of employees (Konings and Vanormelingen, 2010) - Apprenticeships improve business performance including organisational competitiveness, productivity, and quality of its services and products (Bashford, 2006; Hogarth & Hasluck, 2003) - Over 80% of employers who employ apprentices agree that they help increase productivity in their workplace (Populus, 2009) - 81% of consumers say they would favour a company that employs apprentices (Warwick, 2008) - 80% of employers who take on apprentices rely on them to provide skilled workers for the future (Populus, 2009) - Research has found that those businesses that use a greater range of Human Resource Management (HRM) practices can double their profit per employee compared to those businesses implementing relatively few (Guest et al, 2003)
<hr/>	
Individual	<ul style="list-style-type: none"> - Helps avoid low wages (Descy & Tessaring, 2005) - Decreased chance of unemployment (Descy & Tessaring, 2005).

Source: Sector Skills Assessment for Freight Logistics Sector (2010)

1.4 Local Agenda

As a country, we have a high degree of centralisation in our system of government. Many other OECD countries devolve greater powers and spending to tiers of state, regional or local government (Figure 2). In the UK around 30% of public expenditure is spent by local government. This is much lower than our international competitors. The system of local government in England is complex and not suited to the demands of the 21st Century and our need to pursue economic growth (Heseltine, 2012).

Figure 2 International comparison of the percentage of general government expenditure spent by sub central government (2010)



For the UK to face the challenge of international competition, the trend towards centralism should be reversed (Heseltine, 2012). Every area is unique and local leaders are best placed to understand the opportunities and barriers to growth faced within their own areas. The government has recognised the importance of re-empowering local communities to unlock growth. One such step is the Local Enterprise Partnerships (LEPs). 39 have now been endorsed, covering the whole of England.

Local Enterprise Partnerships (LEPs) bring local business and local authorities together to provide the vision and leadership to drive sustainable economic growth and create the conditions to increase private sector jobs in their communities.

LEP boundaries generally reflect the geography of local functional economic market areas. This will help ensure that the full range of barriers to growth in a local economy is considered together. Furthermore, as UK sectors are not uniformly spread across the country the premise of LEPs will insure that industrial hotspots will be considered when LEPs identify where growth is seen to be strategically important at local and national level. Thereby each LEP will be in the best position to identify and align local action to support growth.

Thirteen LEPs have identified logistics as a priority. These are:

- Coventry and Warwickshire
- Cumbria
- Dorset
- Greater Lincolnshire
- Humber
- Leicester and Leicestershire
- Liverpool City Region
- Northamptonshire
- Sheffield City Region
- Solent
- South East Midlands
- Stoke-on-Trent and Staffordshire
- Tees Valley

Skills for Logistics believes that in the future this should expand to at least a further 17 LEPs (See Appendix for list).

1.5 SEMLEP

The South East Midlands Local Enterprise Partnership (SEMLEP) is one of 39 LEPs set up across England. By March 2015 SEMLEP aspires to be one of the most innovative, successful and high performing Local Enterprise Partnerships in England.

SEMLEP aims are to:

- Attract new growth to the area
- Remove barriers to growth
- Deliver growth effectively and speedily
- Grow in a sustainable and cost effective way

The area has identified four showcase sectors of which Logistics is one. The others are Advanced Technology and Manufacturing, Visitor Economy and High Performance Engineering.

The following report looks at the Logistics Sector within the SEMLEP area and highlights the challenges and opportunities facing the sector in that area as well as more broadly.

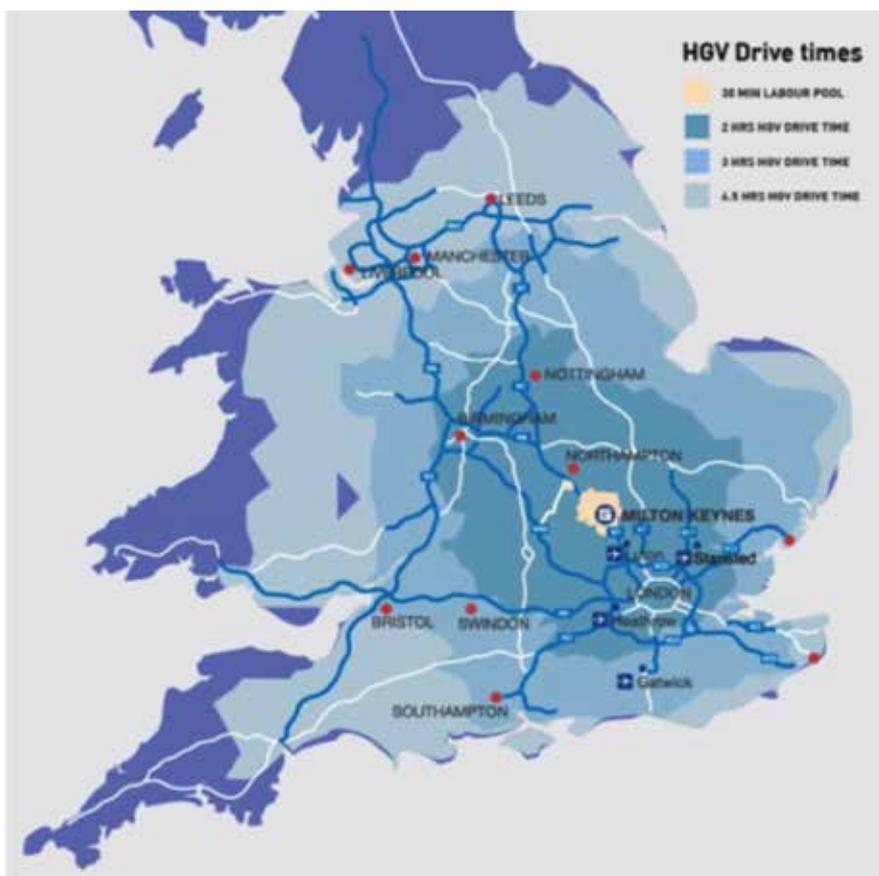
2. SEMLEP and Logistics Sector

The South East Midlands Local Enterprise Partnership (SEMLEP) comprises the four unitary authorities of Bedford Borough, Central Bedfordshire, Luton and Milton Keynes, together with the district councils of Aylesbury Vale, Cherwell, Corby, Daventry, Kettering, Northampton and South Northamptonshire. The area has a £39 billion economy, 67,000 businesses and 1.8 million population.

Within the SEMLEP area, over 91,700 individuals are employed in the Logistics Sector (Appendix Table 8). This is equivalent to 11% of all workers, meaning it employs as many people as the Health Sector. Together they are the biggest employers in SEMLEP.

SEMLEP is in a key location for logistics activities. Its central location makes it one of the most accessible areas in the country. A population of 45.8 million people can be reached within a 4.5 hour LGV drive (Gazeley, 2013).

Figure 3 Accessible LGV locations within 4.5 hrs from SEMLEP



Source: (Gazeley, 2013)

The established regional infrastructure, with easy access to major road networks, dedicated terminals for air freight (Luton), and rail freight located at Daventry International Rail Freight Terminal (DIRFT) and the Eurohub in Corby, combined with labour and low property costs makes South East Midlands a perfect location for logistics organisations to grow and flourish.

labour and low property costs makes South East Midlands a perfect location for logistics organisations to grow and flourish.

Culina Logistics, Yusen Logistics, Kuehne & Nagel, Wincanton, C Butt, Maxim and Eddie Stobart are just a few of the many logistics companies that have substantial facilities in the SEMLEP area. Major retailers such as John Lewis, Amazon, Tesco and Asda also have significant presence.

For these reasons, Skills for Logistics, the Sector Skills Council for the freight and wholesaling sector, has its headquarters in Milton Keynes.

Skills for Logistics:

Works alongside companies in the UK that are involved in moving, handling, storing and wholesale of goods.

SfL’s ambition is to “open doors so that logistics skills potential can be realised enabling people and organisations to do amazing things”. This drives our vision “to deliver the best skilled logistics workforce in the world”.

The key logistics industries in the area are Wholesaling (56 per cent work within), Warehousing and Storage and Freight Transport by Road, which employ 20 and 12 per cent respectively (Table 8, Appendix).

However, a number of occupations are essentially seen as logistics roles, such as driving and warehouse operatives but these can be found across other sectors such as retail and construction. We suspect, taking into account difficulties with data reports that the number working in logistics to be as much as 123,000.

Highest concentrations of employment are within Milton Keynes and Northampton, with 17,400 and 16,300 employed respectively (Table 2), which can be considered to be key hotspots. Examples of some of the key logistics organisations in each area can be found in Appendix (Table 9).

Table 2 Logistics employment within SEMLEP areas

Area	Number employed	Area	Number employed
Milton Keynes	17,400	Bedford Borough	6,200
Northampton	16,300	Cherwell	5,900
Central Bedfordshire	8,000	Aylesbury Vale	5,100
Daventry	7,700	Kettering	5,100
Wellingborough	6,400	Luton	4,600
Corby	6,400	South Northamptonshire	2,800

Source: Business Register and Employment Survey 2012

2.1 Focus Groups

A number of proactive focus groups are run by SEMLEP, which have a distinct role in supporting the growth of companies based in South East Midlands.

Skills Forum

An Open Forum on Skills in SEMLEP was established in October 2012, by Nick Petford, Vice Chancellor of Northampton University and supported by Liz Gifford (freelance Skills Consultant). The provider network was set up in order to develop what the skills messages might be from a range of partners and stakeholders.

Membership includes universities, colleges, private providers, local authority audit learning and economic development and other stakeholders, and has grown to 80 individuals. The group has begun work on a SEMLEP Skills Strategy.

The SEMLEP Skills Strategy attempts to capture the skills priorities for economic growth that have emerge from research and that:

- Partners have in hand that can be intensified; or
- Partners could come together to tackle; or
- SEMLEP Board and Executive can lead or encourage.

There are two main areas for consideration: information sources for planning provision and engaging learners and businesses; and innovations to improve supply/demand position.

The forum has aligned the strategy with growth plans and will establish ways of working to take forward the strategy (e.g. task groups) and engage with business led groups.

Logistics Group

The SEMLEP Logistics Group has been established to help the Board achieve Objective 6 of their Business Plan 'Getting down to Business' which is "to support all SEMLEP local authorities to deliver their economic development plans and related activities designed to stimulate growth, engage business and enhance SEMLEP's reputation in its showcase sectors (of which Logistics is one).

The Group will support the achievement of SEMLEP strategic objective 6 by March 2014 by:

- identifying and benchmarking the number of existing jobs in each of the local authority areas of the SE Midlands in the Logistics showcase sector
- creating an agreed baseline and formula for reliable measurement of new net jobs created over a three year period in the Logistics sector
- seeking to stimulate the SEMLEP Logistics sector to increase the number of net new jobs by 1% above the national average and to contribute to increase in GVA per head across SEMLEP.
- focussing on action to support, scrutinise, offer skills and expertise, stretch thinking and challenge ways of working.

The Logistics Group of SEMLEP will comprise local authority officer representatives and representatives of the Logistics sector throughout the SEMLEP area.

Infrastructure Plan

Infrastructure is vital to the success of any economy; it drives growth, creates jobs, and generates the networks that allow businesses and organisations to thrive (Infrastructure UK, 2013). Investing in the SEMLEP infrastructure is important to help drive future growth, and has been recognised within Objective 3 of their Business Plan: “To facilitate investment in key new physical infrastructure to unlock short and medium term development across SEMLEP”.

SEMLEP has established transport links, with major motorways such as the M1, M6 and M40 within its region, as well key regional trunk roads like the A34, A43, A421 and A14. This is key in the fact that 45.8 million people can be reached within a 4.5 hour LGV drive. However, further investment in the infrastructure is required to help drive growth.

Therefore, to help ensure that SEMLEP gets the critical infrastructure it needs, not just for now, but also for the future, SEMLEP have identified four transport schemes that have been allocated funding between 2015-16 and 2018-19. These include:

- Woodside Link in Central Bedfordshire
- Bedford Western Bypass
- London Luton Airport surface access
- A421 dualling from Milton Keynes to J13 on M1

These improvements will further ease the transport links, enabling logistics companies to operate effectively and efficiently.

2.2 Key available sites

There are a number of sites available in the area that support current organisations and future development potential. Some of these are highlighted below and further details can be found in the Appendix.

SEMLEP has a substantial amount of land allocated to expansion and growth. There is already a developed logistics network, with opportunities for further growth, not just for logistics but also for production companies.



Prologis Park, Corby

Second phase of the successful Eurohub development located in Corby, 150 acres with up to 2,500,000 sq ft

Prologis Park, Kettering

Offers a high profile, high quality site. The development will offer a variety of building sizes all built to the highest standard. Built to Suit opportunities—36,000 up to 331,000 sq ft.

G.Park, Bedford

Ideally located on the new A421 dual carriageway. Units of up to 260,000 sq ft

Prologis Park, Marston Gate

Located half a mile from J13 of the M1 motorway. Major international companies including: Fedex, Wolseley, Amazon, NYK and Rajapack. Built to suit 425,000 sq ft

Prologis Park, Dunstable, Boscombe Road

A prominent and strategically located development site of 32 acres with detailed planning consent for up to 670,000 sq ft



Prologis Apex Park, Daventry, Phase III

ProLogis Apex Park forms part of Drayton Fields. The estate is situated approximately 1.5 miles north of Daventry Town Centre adjacent to the A45. Nearby occupiers include Case New Holland, Netto, DHL and Wincanton. 713,789 sq ft available to build to suit



Prologis RFI, DIRFT II

A rail-connected distribution site with planning consent for 2 million sq ft. Pathways to UK ports, rail terminals and Channel Tunnel



Prologis Park Pineham, Northampton

Prime distribution warehouse location adjacent to the M1 in Northampton providing immediate access to the national motorway network, primary consumer markets and a readily available workforce.



Magna Park, Milton Keynes

Designed to provide a high quality business environment for modern distribution and production companies. Opportunities for large footprint development with unit sizes ranging from 100,000 sq ft to 1 million sq ft

3. Challenges facing SEMLEP

The Logistics Sector across SEMLEP today faces a number of key challenges and opportunities.

3.1 Jobs and Unemployment (Skills Mismatch)

This section sets out to examine the current mismatch of skills in the labour market by examining the demand and supply for skills. It begins by highlighting the current unemployment levels in SEM, before moving onto skills shortages, where employers have difficulties in recruiting and filling their vacancies, revealing if labour demand can be met by labour supply. It then analyses the existing workforce, to see if workers are proficient or not in their jobs (skills gaps).

3.1.1 Unemployment

64,000 individuals that are economically active across SEMLEP are unemployed. This equates to 6.9 per cent of all those who are economically active (NOMIS, 2013), compared to 7.8 per cent across Great Britain. 28,900 of those unemployed are male and 35,100 female.

Of the economically inactive population, within SEMLEP, 47,800 individuals would like a job.

In an affluent area of the UK, SEMLEP comparatively has the highest unemployment proportion, together with Northamptonshire (Table 3).

Table 3 Unemployment levels in surrounding LEPS (July 12 –June 13)

LEP	% Economical Active – Unemployed	Inactive population who would like a job	
		Total Number	Proportion of inactive who would like a job
Northamptonshire	7.0%	16,800	21.7%
South East Midlands	6.9%	47,800	22.3%
Oxfordshire	6.3%	10,400	14.1%
Greater Cambridge and Greater Peterborough	5.9%	42,900	26.6%
Buckinghamshire Thames Valley	5.8%	12,900	21.7%
Hertfordshire	5.4%	25,300	20.0%

Source: (NOMIS, 2013)

Nearly 31,000 individuals claimed Jobseeker's Allowance (JSA) in September 2013 (NOMIS, 2013). Of these 24 per cent were young people (under 25), 57 per cent between 25 and 49 years of age and 19 per cent were aged 50 to 64. Of great concern is that 46 per cent have been claiming JSA for over six months. It is imperative that help and guidance is provided to them to ensure they can enter the job market.

Luton has the greatest number of individuals claiming JSA, closely followed by Northampton and Milton Keynes.

Table 4 Claimants within SEMLEP areas (September 2013)

Area	Number Claimants	% of Economical Active Claiming JSA
Luton	5,041	5.1%
Northampton	4,861	4.3%
Milton Keynes	4,734	3.5%
Bedford Borough	3,726	4.2%
Central Bedfordshire	3,159	2.3%
Kettering	1,886	3.8%
Wellingborough	1,813	4.9%
Corby	1,625	5.2%
Aylesbury Vale	1,587	1.8%
Cherwell	1,068	1.3%
Daventry	917	2.3%
South Northamptonshire	577	1.1%
South East Midlands	30,994	

Source: (NOMIS, 2013)

3.1.2 Nature of vacancies and skills shortages

There are opportunities for employment in logistics across SEMLEP (Table 4). Overall there are more individuals seeking a role in the sector, than vacancies notified to Jobcentre Plus (5,675 versus 4,640). However, there is a mismatch in the supply and demand.

For example, for every individual seeking an LGV role, there are up to 18 positions being advertised and for postal worker/courier jobs there are seven positions for every one person seeking such as role. Employers are experiencing skills shortages. Conversely, for every goods handling and storage job advertised there are more than four individuals looking for work in that area.

Table 5 Logistics vacancies compared to number of claimants seeking (November 2012)

Key Logistics Job Role	Number of Vacancies	Number of Claimants Seeking Role	Ratio
Skills-shortages			
Large (Heavy) Goods Vehicle Drivers	2,215	120	18:1
Postal Workers, Mail Sorters, Messengers, Couriers	431	60	7:1
Transport and Distribution Clerks	85	20	4:1
Forklift Truck Drivers	529	375	3:2
Stevedores, Dockers and Slingers	11	5	2:1
Over Supply			
Importers, Exporters	1	5	1:5
Other Goods Handling and Storage Occupations	962	4,080	1:4
Van Drivers	363	900	2:5
Transport and Distribution Managers	7	25	2:7
Storage and Warehouse Managers	36	75	1:2
Purchasing Managers	0	10	0:10

Source: NOMIS: Vacancies – notified by occupation and Claimant count – occupation

Table 5 shows that in key areas the sector has trouble attracting new recruits with the right training and development (Moloney, 2011). Logistics establishments report that a third (31 per cent) of their vacancies are considered to be hard-to-fill (UKCES, 2012). Specific skills employers find difficult to obtain from applicants include:

- Job specific skills
- Technical or practical skills
- Customer handling skills
- Planning and organisational skills
- Oral communications

The most identified reason for this struggle in recruitment is considered to be the image of the sector. The lack of understanding about the sector, the perceived lack of career progression and the role of the media all contribute to the poor image (Moloney, 2011).

3.1.3 Implications of skills shortages

The impact of having these vacancies today includes an increased workload for other staff, the loss of business or orders to competitors and delays in developing new products or services, which in turn will have an impact on the productivity and prosperity of the organisation.

Particular recruitment issues have been documented with younger workers and drivers, which may impact the sector's ability to fulfil its replacement demands of 900,000 additional workers by 2020.

Younger workers

Attracting young workers is a particular problem for the sector. Only 20 per cent of SEMLEP logistics employers have recruited at least one education leaver to their first job on leaving education in the last 12 months. This is much lower than the all sector figure of 25 per cent, and places logistics in the bottom third of all sectors for recruiting young people.

The challenge is that individuals do not consider it as a career of first choice – they 'fall' into the sector, considering it to be only a job of last resort. Our research shows that the term 'logistics' is misunderstood by 64 per cent of 14-19 year olds. This makes it harder to attract quality entrants.

As a consequence, when employing a young person, nearly a third of employers found 16 year olds to be poorly or very poorly prepared for work, while 29 per cent of those employing 17-18 year olds from school thought they were poorly or very poorly prepared (UKCES, 2012).

The skills or attributes employers report to be lacking in educational leavers whose work-readiness was perceived to be poorly prepared include:

- Lack of working world/life experience or maturity
- Poor attitude, personality or lack of motivation
- Lack required skills or competencies

Employers are then reporting that they have to provide basic training to individuals (Moloney, 2011).

Drivers

The shortage of LGV drivers is not a new phenomenon (Winters, 2012), but it continues and is likely to increase in the future with economic recovery. In addition to the image of the role, there are other entry barriers (i.e. licence acquisition and Driver CPC) and as such, individuals 'are put off by cost to attain licence especially when things are tight' (Moloney, 2011). Furthermore the need to generally have two years' experience and be over 25 years of age mean young individuals struggle to enter the driving profession. A consequence is that by the age of 25, many have already decided upon a different career option.

With more than 60 per cent of goods moved by road, it is vital there are enough professional drivers now and in the future. McKinnon (2004) concluded that without lorries carrying freight, current standards of living could be maintained for only a few days and for the economy as a whole, the loss of road transport for a week would be devastating. For example, during September 2000, a group of road hauliers blockaded British oil refineries, bringing the supply of fuel to a halt. The cost to firms from this protest was estimated to be £1bn (The Guardian, 2000).

Looking towards the future and a more prosperous economy, concerns were raised that the sector may struggle to attract recruits (Moloney, 2011). Sector specialists felt that the potential number of applicants will be lower than seen today because there will be more choices in other more sought after sectors. The quality of applicants would also be lower with the necessary skills, experience, motivation and attitude lacking. The sector would therefore struggle to meet the replacement of demand by 2020.

3.1.4 Skills gaps

Nine per cent of SEMLEP logistics establishments report having at least one member of staff that is not fully proficient (skills gaps). This means that individuals do not have the full set of skills to perform their jobs, which can impact their efficiency and productivity and in turn that of the company. 80 per cent of logistics employers report that skills gaps impact how the company performs, which is much greater than the all sector figure of 66 per cent.

The skills lacking in the current workforce closely reflect the skills reported missing from applicants. This indicates that employers recruit individuals without the full skill set required, who then need to undertake training to meet the basic job requirements.

The top skills gaps are those which the sector relies on: job related technical skills and customer service. If these are lacking, there will be a negative impact on performance.

The difficulty with the technical and job specific skills, is that they undergo a continuous and rapid development. The fleets of vehicles are being modernised to comply with environmental standards, but also to improve the UK's competitiveness on the international arena. Support systems are increasingly becoming internet-based and undergoing recurring improvements, requiring staff to stay up to date with the most recent versions used by their employers. The potential technical skills deficiencies in that area mean that the operators do not manage to use the full potential of the technology they invested in, hampering the growth of the company.

Skills gaps for drivers is an ever increasing concern. Professional LGV drivers who acquired their Driver CPC rights in September 2009 are now nearing the end of the first five year cycle for completion of 35 hours of approved periodic training. Beyond September 2014, a professional driver must hold a Driver Qualification Card (DQC). If

they do not then they will not be able to drive professionally. To date of the 652,000 active drivers 66 per cent still need to complete their periodic training and trigger a DQC (Winters, 2013). There is a high potential that many current drivers will not or will chose not to, continue to work as drivers. This will further exacerbate the issues surrounding the lack of drivers entering.

Customer service and communication skills are being expected more from operational staff, who are the main labour force of the sector in terms of their numbers, but who in the past were not expected to deal with the customers. Their abilities to adjust are at the core of the operators' further development, as those who do not address customers' needs, end up being overtaken by the competition.

3.2 Training Provision

Central to the enhancement of skills within the workforce is the provision of training and staff development. Yet the Logistics Sector is not world class when it comes to providing training (Moloney, 2010).

In terms of training days per annum per employee the Logistics Sector provides the second least amount (2.7 days) across all sectors. Only the Mining and Quarrying sector provides fewer at 1.7 days (Davies, 2012).

3.2.1 Lack of funds

Logistics organisations operate on low margins. Typically, profit margins are around one to three per cent (Department for Transport, 2011) and organisations are more concerned with day to day survival. This can restrict the amount of cash that is recycled back into the business and make managers more risk averse to investments, including spending on training.

Few employers have a training budget. Only 15 per cent of logistics employers across the SEMLEP have one, which is lower than the UK logistics proportion of 22 per cent. It is also much lower than the SEMLEP all sector average of 29 per cent.

As a consequence, 47 per cent of logistics companies across SEMLEP have not funded or arranged staff training and nearly three fifths of employees (59 per cent) have not received training. This is much greater than all sector SEMLEP data of 46 per cent of workers not receiving training (UKCES, 2012).

A further challenge is that businesses who employ few individuals are even less likely to fund or arrange funding. This is a particular issue in the Logistics Sector, where 81 per cent of all businesses employ less than ten individuals.

3.2.2 Releasing staff to train

Enabling staff to leave the workplace to undertake training is a particular problem for organisations, especially smaller ones that have less organisational slack to cover staff away on training.

3.2.3 Access to suitable training provision

Accessing 'suitable' training has a number of elements, including the convenience of timing and scheduling of courses, location and the course itself. Employers seek specific training provision that is relevant to the firm's needs.

36% of logistics employers felt that the currently available training and qualifications on offer are not suitable (Moloney, 2011). Feedback included that training provision tended to be too long and time consuming, expensive and in some instances, out of date with the current legislation. Approximately half of the employers found that there is too much bureaucracy when trying to access training courses and qualifications.

3.2.4 Lack of information

When managers are trying to make decisions about whether to invest in training, they often encounter difficulties gathering information on training provision, understanding what the risks and future benefits could be of the training and where they can source quality training. One in ten employers that did not use training providers (private, FE colleges or Universities) cited a lack of knowledge as a reason for not using them (Shury, 2012). This can further hinder investment into training.

Relatively few SEMLEP logistics companies have a training plan which specifies in advance the level and type of training they will need (24 per cent compared to the UK logistics average of 32 per cent). Given that we have seen that 53 per cent of workplaces had provided training, this indicates that training takes place on an ad hoc basis without being formally planned, which may not necessarily ensure that training will bring about the maximum benefits.

The challenge for the sector is to ensure that there are solutions in place to overcome the barriers employers face to training. One such way is Collective Measures (encouraging employers in the sector to train on a collective basis).

3.3 Collective Measures

However, the Logistics Sector lacks many of the available levers recognised to encourage employers in the sector to train on a collective basis. Those that do exist tend to be those which are compulsory, employer resourced training.

3.3.1 Occupational licensing

The biggest lever for employers to undertake training is compliance. The sector must be compliant with a number of legislative training requirements, which are usually driven through European Directives, in order to operate.

For example, professional drivers in vehicles over 3.5 tonnes fall within scope of the Driver Certificate of Professional Competence (CPC) (EU Directive 2003/59). There are two parts to the legislation:

- The Initial Qualification, which must be achieved by new LGV and PCV drivers along with their vocational licence.
- Periodic Training, which involves all professional drivers undertaking 35 hours of training over a 5 year period.

The Transport Manager's CPC enables the company to hold an Operators ('O') Licence for Hire and Reward purposes and is required if a business operates goods vehicles with a gross plated weight over 3.5 tonnes. At least one person (dependent upon size of organisation) is required to hold Transport Manager's CPC within a Hire and Reward organisation. While the use of lift-trucks is overseen by the Health and Safety Executive, which expects operators to have been trained by approved instructors and hold the relevant certificates.

However, this does mean that training tends to focus around specific roles and not necessarily across the entire organisation.

3.3.2 Inter-employer collaboration

Inter-employer collaboration for training can be defined as 'any situation where two or more firms co-operate in the organisation of training. This may cover various stages of training, from setting the standards, sourcing of trainees, delivery of training, monitoring of progress and assessment and certification' (Cox, 2009) .

Some degree of employer collaboration does exist across the sector – the setting of National Occupational Standards sees Skills for Logistics and employers collaborating. But more can be done.

Inter-employer collaboration can benefit organisations. They can: increase the range of ideas available to solve business-related problems; provide evidence of their impact directly from organisations benefiting, which is likely to be of higher credibility to organisations than information received via a third party. Also they have wider spill over effects through the possibility of providing new links to suppliers and customers. Furthermore there is an argument that viewing training as 'collective goods' can help overcome market failure problems that concern training, such as information on training quality, and educate managers about the benefits of training to overcome poaching fears (Streeck, 1987; Johansen, 2002 in (Cox, 2009).

By acting collectively, it could be possible to change the approach of groups of employers to training, but enabling this requires institutional support and co-ordination. Inter-employer collaboration can tackle the challenges of capacity and capability, and may also address motivation. Employer networks are a powerful tool for the adoption of management practices because they are encouraged to copy each other's behaviours (Cox, 2009). Evidence shows training activity is highest in firms that belong to multiple networks (Hoque and Bacon, 2006 in (Cox, 2009).

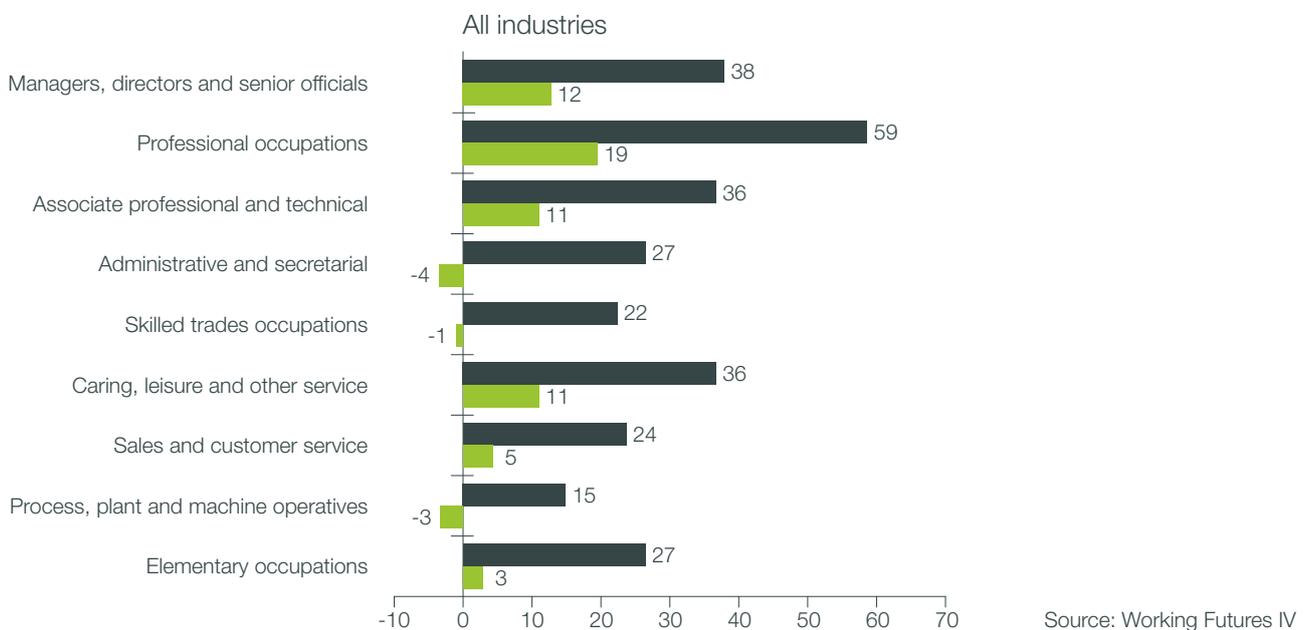
Group Training Associations (GTAs) can provide economies of scale, offering specialist training expertise that is not available within companies, and reduce costs (Cox, 2009). Yet few are available with logistics training (GTA England, 2013).



4. Future workforce needs

Employment across SEMLEP is expected to grow by 54,000 individuals, between 2014-2020 (Wilson, 2012). Alongside this growth, employers will also need to replace many of their workers who leave due to mortality, retirement, career moves or other reasons. This is known as replacement demand and is calculated to be 231,000 for the same period. This means that 285,000 additional workers are required to work in SEMLEP. Additional workers are required across all occupational groups. The anticipated growth and net requirement for each major occupational group is shown in Figure 4.

Figure 4 The anticipated growth and net requirement for each major occupational group



The transport and storage sector, anticipates a total requirement of 19,000 – of which nearly 40 per cent are machine operatives (drivers) in the same period. While wholesale and retail require a further 48,000 individuals, mainly across managerial positions and sales and customer care.

4.1.1 Older workers

The current talent pool shows that the logistics workforce is dominated by older workers (34 per cent are aged 45 or over); so much of the future demand will be the need to replace workers who leave their jobs due to retirement. The sector needs to ensure that the skills and knowledge of these older workers are not lost.

We can gauge which specific occupations are most at risk at being affected by retirement over the next ten years by looking at the age demographics of key logistics roles.

There are nine occupations which are essentially logistics roles and these account for 64 per cent of the logistics workforce (Table 6). Demographic information shows that nearly all have a workforce dominated by older workers, the exception being forklift truck drivers. Of particular concern is the high proportion of older transport and distribution managers and drivers.

Table 6 Key Logistics occupations

SOC	Definition	Under 25	% over 45
1161	Transport and distribution managers	<1%	49%
8212	Van drivers	10%	48%
1162	Storage and warehouse managers	<1%	40%
8211	Heavy (Large) Goods Vehicle drivers (LGV)	9%	38%
9211	Post worker, mail sorter, messenger or courier	15%	33%
9260	Elementary storage occupations	12%	32%
1133	Purchasing managers	<1%	31%
4134	Transport and distribution clerks	19%	25%
8222	Forklift Truck Drivers	10%	16%

Source: Annual Population Survey 2012 (Office for National Statistics, 2013)

4.1.2 Talent Pools

The sector needs to plan where future workforce requirements will come from. What talent pools are there available that the sector can tap into?

One that has been identified by Skills for Logistics is the Military. The Strategic Defence and Security Review announced a reduction of 17,000 posts in the Regular Armed Forces, with a further 12,000 to the Army announced in 2011 (Ministry of Defence , 2013). Bicester is one Barrack in SEM area to be affected.

Many of those in the Military have transferable logistics skills. However, many do not consider seeking opportunities in the sector, namely due to lack of awareness of the potential the sector offers. Instead they undergo retraining within the resettlement packages to work in other sectors. Work needs to be done to encourage them to stay in a sector in which they already possess a number of the required skills.

Ex-offenders are a further talent pool. SEM has a number of prisons located in the area, including HMPs; Bedford, Aylesbury (a young offenders institution), Spring Hill, Grendon and Woodhill. These facilities have educational programmes, including vocational courses in which the skills required within the sector could be gained. But increasing their awareness of opportunities is needed.

Logistics also employs substantially less females than other sectors. 29 per cent of the workforce are female compared to all sector SEM figure of 46 per cent. The perception of sector being dirty, heavy work is a deterrent to some females but the reality is much different. Warehouses are generally, new modern buildings, which offer flexible working opportunities. Vehicle developments, no longer mean that strength is a requirement to drive lorries, while numerous opportunities exist with the supply chain management.

As previously mentioned lack of sector awareness and perceived image means that many other talent pools, like young people, and underemployed, do not consider the sector as a potential workplace and career.

4.1.3 New skills requirements

A number of factors will impact the future demand for, and supply of skills. These include:

Technology

Technological change has affected the transport sector profoundly in the last ten years, and will probably affect it even more in the next ten years. The desire to improve competitiveness means employers look for technologies to gain greater efficiencies.

Ever more technologically advanced vehicles require upskilling (i.e. digital tachographs, GPS routing). However, vehicle developments, such as improving comfort and manoeuvrability are reducing the need for high levels of stamina and strength amongst drivers and thereby increasing the potential pool of labour.

Computerisation is helping supply chains to become more tightly and yet more flexibly integrated. Control of stocks, through scanning equipment, allows for tighter planning, permitting for lower levels of stock to be held against prospective demand. While automation, for example in warehousing operations, can accelerate and improve the reliability of 'picking' and order assembly.

The skills implication is that employees will need to have the ability to deal with the continually changing technologies available, and also the skills and opportunity to learn to use the new technology.

Environmental

The UK's target to reduce emissions by 80 per cent by 2050 compared to the 1990s levels brings a number of challenges to the whole economy (HM Government, 2011). Transport activities make an essential contribution to our economic success but also impose a burden upon the environment. Transport comprises around 26 per cent of the UK CO₂ emissions, with LGV and vans accounting for a third of these (Department of Energy & Climate Change, 2013).

With increased international attention and pressures, customers have become more focused on the environmental impacts of transportation. Leading companies need to understand the importance of using innovative technology in order to reduce their carbon footprints, either through lower carbon choices (including electric vehicles), increased penetration of biofuels and or behaviour changes. Further opportunities to reduce emissions, which have their own skills implication, include:

- Improving conventional vehicle efficiency – i.e. low rolling resistance tyres, aerodynamic trailer/bodies
- Scaling up of electric vehicles and plug-in hybrid vehicles
- Modal Shift – from high emitting road to rail or water or from air to rail
- Supply Chain rationalisation – optimising distribution centre locations, sourcing products locally and greater use of consolidation centres
- Vehicle utilisation – car-sharing, increasing load sharing, back loading initiatives and software for routing and load consolidation
- Other – reducing 'just-in-time' business practices and increasing the size and weight of trucks may also provide emissions savings

Furthermore, warehousing is responsible for a further three per cent of UK's CO₂ emissions. As energy prices and waste disposal costs increase through the reduction in availability of landfill, there are increasingly skills implications of 'green behaviours' for the workforce, for example, understanding of the value of saving energy and recycling.

New skills will therefore be required around the technological solutions that are designed, developed and marketed; drivers will be trained in eco-driving, and monitoring skills for carbon use and knowledge by individual firms of what they want to achieve and how they can achieve this will be needed.

Consumer Demand

E-commerce is one of the fastest growing markets in the UK and is expected to continue to expand. With the online retail market growing rapidly and traditional retailers broadening their sales channels, demand for new warehouse and distribution space is growing swiftly.

In the SEMLEP region, John Lewis, River Island and AG Barr recently opened new warehouses at Magna Park, Milton Keynes, with John Lewis developing a second warehouse due for completion later in 2013 (West, 2013).

E-retailers require far more complex distribution systems than traditional logistics markets. Firstly e-commerce business is based upon a 'Business to Consumer' model. This increases the number of customers the e-retailer/warehouse occupier is dealing with in thousands. This means that customer service skills will become a premium.

Further implications that need considering, could include the need to work with multiple suppliers, varying storage requirements, the distribution of large quantities of small products with short delivery times and also reverse logistics. Therefore, there is a strong demand to embrace the whole supply chain, meaning that to run the whole process smoothly and efficiently a reliable management and order tracking system should be in place. Amazon is a prime example of such a company within the SEMLEP area.

Traditional retailers with online operations also have unique warehouse and distribution requirements. They have the added complication of offering multiple delivery options, ranging from home delivery to in-store pick-up. This means that many traditional retailers are having to transform their distribution systems in order to achieve higher efficiencies and lower storage costs. The SEMLEP area has a number of affordable land opportunities (see Appendix Table 9).

5. Solutions to the Challenges faced

Skills for Logistics has piloted a number of solutions that improve the skills base of the Logistics Sector. By bringing these all together, it will encourage employers in the sector to consider the current workforce needs in terms of skills development and also future workforce needs.

These proposed solutions will help overcome the challenges that have been identified in the previous section.

Table 7 Proposed solutions to challenges SEMLEP logistics faces

Challenge	Solutions					
	Employer Networks: LLCNs	Engagement Tools	Professional Development Stairway	Programme Development (Qualifications)	Guild: Credit Union	Guild: Recruitment Services
Jobs and Unemployment	X	X	X	X	X	X
Training Provision	X	X	X	X	X	X
Getting employers and partners to work together	X	X		X	X	X
Future workforce needs	X	X		X	X	X

5.1 Local Logistics Community Networks (LLCNs)

Employer networks are seen to be an effective route to securing greater employer investment in training. Skills for Logistics has already established five Local Logistics Community Networks (LLCNs) across the UK. The concept can be adapted across newly identified hotspots, using our experience to ensure best practice and value for money.

These LLCNs consist of employers, local authorities, training providers and other organisations that are focused on skills development and employment opportunities. One role of the LLCN is to connect the logistics sector to the local community, thereby increasing its attractiveness amongst local talent pools and establishing itself as a career of choice. The LLCNs also promote the benefits and encourage skills development.

5.1.1 Partnerships

LLCNs will also bring together organisations to form partnerships that can aid recruitment into the sector. The case study below demonstrates how partnerships can work together to ease entry routes into the sector in the area of driving.

LLCN: Young Driver Programme

Daventry's logistics training hub which is part of the SfL Daventry LLCN launched a Professional Driver Scheme for the young people of Northampton.

Working in partnership with Northampton College, Northampton Enterprise Partnership and Northampton and Daventry Job Centre Plus, a sector based work academy for young people (19 to 24) wishing to become professional drivers is in development.

It is proposed that the Category C (LGV) Large Goods Vehicle licence acquisition will be funded by JCP, employability and soft skills to be delivered by the college. The licence acquisition and additional practical driving skills will be delivered by JCP's approved driver training provider.

The programme and recruitment process is supported by a number of local logistics employers, who are also involved in the development of the practical driver training programme offered as part of this initiative.

As part of the learner's journey it is anticipated that once in employment, the opportunity will be made available to continue learning, in the form of vocational qualifications and apprenticeships.

5.1.2 Information

Employer networks have been shown to be beneficial on a number of levels. Employer decision making may benefit from persuasive narratives, where employers can gather first-hand accounts of the benefits of training from other employers. Furthermore, providing information on sources of training may also be important in influencing the training decision. They can also help employers gain access to information about training and funding when accompanied by a brokering mechanism (Stanfield, 2009).

The LLCNs will provide opportunities to share information and best practice. Through research, with the groups, the quality of information about the benefits of training can be increased. This local relevant information can then further be disseminated in locally focused newsletters. This can then enable managers, wider than the LLCNs, to make informed decisions about investing in training.

One tool already created by Skills for Logistics to help employers make informed decisions about training is the Skills Calculator.

Informed Decisions: Skills Calculator

The Skills Calculator has been created by Skills for Logistics, to help employers understand the Return on Investment (RoI) of employing an Apprentice on any Logistics Framework, within the four nations.

An easy step by step tool, the calculator will guide the employer through the apprenticeships and the pathways available in the sector, take account of funding available for the different age groups and anticipated salary costs while training and after completion, before providing the employer with a Return on Investment rate.

5.1.3 Local training

Through the LLCNs, the barriers of accessing suitable training provisions can be overcome. Skills for Logistics will be able to engage both employers and training providers. This will ensure that employer demands are articulated and relevant training is available through a local network of quality assured training providers.

5.2 Engagement tools

To support the LLCN in its work, Skills for Logistics has developed a number of engagement tools that aim to help business improve its engagement with talent pools, such as schools and to assist in raising the awareness of the Logistics Sector and the careers it can offer. These include the Logistics Locker, Delivering your Future, Made in China and Job Clubs.

Exposure

- **500+ schools in 5 LLCN areas have received information regarding the engagement tools**
- **Attended 16 Careers Fairs promoting the tools**
- **300+ employers trained on the Logistics Locker**
- **72 schools trained on Logistics Locker and have access to Made in China Resources**
- **2 made in China Enterprise days held, with further 5 planned before Christmas – the one in Scotland is with the Princes Trust, who are using it as part of a pre-employment interview with job seekers to see how people work together in teams.**
- **209 people have accessed pre-employment training through Job Clubs**
- **Nearly 40,000 visits to Delivering your Future website**

5.2.1 School engagement

There are many reasons for fostering a greater involvement of businesses with schools. Evidence shows that young people who have experienced employer engagement activities, such as work experience, are five times less likely to end up outside education, training and employment (Mann, 2012).

Employer involvement in schools can also increase understanding of career opportunities and ensure better and higher quality work experience. It can help students improve their CV writing and interviewing skills in a realistic setting. Crucially, it can help ensure that young people's decisions about future education and training options are informed by real and early exposure to the business world.

We can help increase the employability of young people by educating and enthusing them about the world of work, particularly the opportunities in logistics, and demonstrate to them the applicability of what they learn in the classroom, through programmes like Made in China.

The below case study provides an example of teaching our future workforce about logistics and business.

Enterprise activities: Made in China

Made in China is a school enterprise activity organised by Skills for Logistics in conjunction with logistics companies. It introduces 14-16 year olds to the world of logistics, the role logistics plays as a key sector within the UK's economy and the broad range of careers the sector can offer.

4 teams from Parker E-ACT Academy in Daventry and Campion Secondary School in Northampton took part in the event at Towcester. The teams were tasked with creating imaginary global logistics companies attempting to win a contract to transport electronic goods from China to the UK. Each team had to create a company logo and strapline. They then had to establish the best overall transport solution by sea and air, while demonstrating a commitment to reducing their carbon footprint. Teams were marked on their teamwork, how they managed tasks and how logically they tackled problems. The task culminated with each team presenting their tender to a team of judges.

Graham Slack, Training Manager Operations, Wincanton said:

"I thoroughly enjoyed being involved with this event and applaud SFL for their initiative and commitment towards introducing young people to our industry.

I was particularly impressed with how the students worked together in a team based scenario and their awareness of the environmental issues surrounding our industry.

If this level of interest is maintained, I am sure that these young students will go on to become an asset to any logistics employer."

5.2.2 Job Clubs

Skills for Logistics, together with Beyond2030, have set up a development programme providing opportunities for jobs in logistics in Rugby and Nuneaton. It focuses on access to job searching skills and a six week development programme focusing on the knowledge, motivation, skills and confidence to help get people into employment. This programme is ideal for unemployed individuals and can easily be adapted into other areas.

5.3 Professional Development Stairway

The sector has historically lacked a career progression route. Skills for Logistics produced, with support and consultation of employers, The Professional Development Stairway (PDS), providing a common platform for employers, employees and stakeholders to understand and manage career development opportunities across the Logistics Sector.

This tool continues to be developed. At present, Skills for Logistics is designing a mobile app based on the PDS that will have two parts:

1. a readily accessible PDS tool for students in schools, FE and HE with an interest in logistics which:
 - highlights the range of job roles in the sector and potential career progression pathways;
 - provides case studies or career journeys of present logistics professionals;
 - signposts to additional career resources – the Logistics Locker, the Logistics Guild, the Skills Calculator;
2. a pathway for Human Resource professionals in the Logistics Sector which:
 - provides an overview of National Occupational Standards (NOS);
 - links performance management to NOS;
 - aids in developing or enhancing their performance management systems;
 - provides downloadable performance management templates.

5.4 Programme (Qualification) development

Skills for Logistics, through its employer networks of LLCNS and Occupational Craft Skills Groups, is working with employers to ensure that they have the opportunity to access relevant training that can lead to recognised qualifications, thereby formally increasing the skills levels of the workforce.

Skills for Logistics is in a unique position whereby it can undertake research with employers at a local level to determine the specific skills gaps local logistics employers face and offer a solution in terms of programme development, that could align with the QCF. This will enable individuals to work towards recognised qualification while at the same time providing training that suits employer's needs.

Policies which compel businesses to invest in training, such as occupational licensing, could help overcome the barrier of releasing staff for training (Stanfield, 2009). Skills for Logistics has recently undertaken feasibility studies into Licence to Practise for Trainers of Driver CPC and Large Goods Vehicle Driving Instructors. Both of these studies looked at the concept of a licence to practise as a way to ensure drivers only receive training from individuals who are properly trained and qualified.

5.5 Talent Pools

Skills for Logistics has identified a number of talent pools that would provide an ideal pool to fulfil the sector workforce needs, now and in the future. SfL are working towards initiatives to promote the sector and help individuals gain work experience and potential employment opportunities. We are currently piloting a programme with one of our identified talent pools – Military personnel – which can be adapted to other talent pools, such as under-employed, ex-offenders, NEETs.

Work Placement Programme: Military

Skills for Logistics launched a new initiative that sees companies offering a 2-week work placement, a guaranteed interview and feedback to Service Leavers.

The company provides work placement training which helps Service Leavers demonstrate their clear worth to employers and also enable them to see what opportunities exist in the sector.

Over 1,000 Service Leavers have received work placements, with 300 expected to successfully gain employment as a result.

5.6 The Logistics Guild

The Logistics Guild is a support network of shared resource, run for and by its members. Specifically set up for anyone who works in the sector, it's free and no qualifications are required to become a member. Members are able to share ideas, support, guidance, development and jobs.

5.6.1 The Logistics Guild Recruitment Service

Through The Logistics Guild's significant knowledge, experience and sector expertise, the Recruitment Service aims to match candidates, employers and recruiters.

Guild Members are encouraged to display their skills, knowledge, expertise, qualifications and training as part of their Guild biography and member history. The Guild is able to align a member's position, learning and development, with employer vacancies in an industry standard framework allowing employers and recruiters to easily identify skills and experience. This will enable The Logistics Guild Recruitment Services to match real logistics jobs to The Logistics Guild members.

5.6.2 Credit Union

The ability to provide sources of funding or ways of indirectly reducing the cost of training to businesses is seen as a way to overcome the barrier of a lack of funds (Stanfield, 2009). Skills for Logistics and The Logistics Guild are leading the way with the development of a Credit Union for the Logistics Sector.

Any financial surplus from the Logistics Credit Union will be channelled as bursaries for members to help pay for training. Importantly, in a sector with a larger proportion of people who struggle with reading and writing, money can be drawn by members to help improve basic skills.

As the Credit Union develops momentum, we hope that it will be in a position to offer financing to employers in the sector for vehicle, plant and machinery leasing at preferential rates to employer members, all with the ethical lending ethos of a Credit Union.





6. Conclusion

The role that skills plays in economic growth is increasingly being recognised. Upskilling the UK workforce would bring about significant benefits to the economy, businesses and individuals. For businesses, staff training brings about bottom line benefits and it has been shown that organisations are more likely to survive if they train. For individuals, a strong skills set reduces the chances of unemployment and increases expected wages.

Logistics is seen to be a critical enabler in improving the competitiveness of a nation and local areas. The ability to connect to local and global markets is a key aspect of a country's capacity and capability to compete, grow, attract investment and create jobs.

The UK Logistics Sector employs 2.2 million people, one in twelve UK workers. But the sector's performance lags behind many of our European competitors. The sector particularly underperforms with regards to education and training – ranking 28th in extent of staff training. This is a key concern considering the World Economic Forum, in their Global Competitiveness Report, states that the quality of education and training is crucial for domestic economies wanting to move up the value chain. In particular, today's globalised economy requires pools of well educated workers who are able to adapt rapidly to their changing environments.

Logistics, due to technological changes, consumer demand and environmental factors amongst others, is a sector that undergoes continual changes. The workforce needs to be able to adapt. Therefore, having the right skills and training in place is vital.

Across the SEMLEP area, logistics employs as many people as the Health Sector – 91,700 individuals, the equivalent of 11 per cent of all workers. Together they are the biggest employers in SEMLEP. Highest concentrations of logistics employment are found in Milton Keynes, Northampton and Bedford: locations which have attracted key logistics employers due to the availability of land for warehousing and the ease of motorway access, which allows 45.8 million people to be reached within a 4.5 hour LGV drive. These locations also have the potential for further warehouse development and in turn employment opportunities, and would be suitable locations for the development of LLCNs.

It is therefore important to ensure that the supply of personnel is available to meet today's and future requirements.

In an affluent area of the UK, SEMLEP has the highest unemployment rate (6.9. per cent), together with Northamptonshire. Nearly 31,000 individuals are claiming JSA, of which 24 per cent are young people (under 25). Of concern is that 46 per cent of those claiming JSA have done so for more than six months.

There are opportunities for employment in logistics across SEMLEP. However, there is a clear mismatch in supply and demand. For example, for every individual seeking an LGV role, there are up to 18 positions being advertised and for postal workers/courier jobs there are seven positions for every one person seeking such a role. Conversely for every goods handling and storage job advertised there are more than four individuals seeking such work. Employers report that a third of vacancies are considered hard-to-fill, which consequently impacts their business, through loss of business or orders to competitors, delays in developing new products or services and increasing the workload for existing staff.

The sector clearly struggles to recruit specific occupations. But it also struggles with specific talent pools.

A shortage of LGV drivers is not a new phenomenon but the economic situation and migrant workers did lessen the problem. However, the requirement for all professional drivers to hold a Driver Qualification Card, obtained through undertaking either the initial test or via Driver CPC periodic training, places a new demand for suitably trained drivers and will exacerbate the driver shortage issue. As the economy recovers, the need for drivers will increase further. More than 60 per cent of all goods are moved by road, meaning professional drivers are critical for the economy. Without lorries and their drivers, the standard of living across the UK can only be maintained for a few days.

Attracting young people is a problem for the sector. Only seven per cent of the workforce is under 25, while more than a third are over 45 years of age. Compounding this is the fact that only 20 per cent of logistics employers have recruited at least one education leaver to their first job, with nearly a third of employers reporting the young person was poorly or very poorly prepared for work.

The most identified reason for the struggle to attract drivers and young people is the image of the sector. Young people, in particular, lack understanding of the sector – 66 per cent of 14-19 year olds misunderstood the term 'logistics'. If they don't know what the sector is about then why would they consider it as a career? Individuals 'fall' into the sector, considering it to be a job of last resort. This in turn makes it harder to attract quality entrants. The driving professional faces further entry barriers, such as cost, the need to generally have 2 years' experience and be over 25 for insurance purposes. But by the age of 25 many have decided upon another career.





Other talent pools that do not consider seeking opportunities in the sector include ex-service personnel and women. Many ex-service personnel have transferable logistics skills but they undergo retraining to work in other sectors, due to lack of awareness of the opportunities that exist within logistics. For women, the perception of dirty and heavy work is also a barrier.

It is imperative the sector overcomes these recruitment challenges to ensure it can fulfil the demand for additional workers by 2020. But it is not just recruitment where the sector faces challenges that can hinder growth opportunities.

The skills levels of logistics workers across SEMLEP are low. 36 per cent do not have a Level 2 qualification, compared to the all sector figure of 24 per cent. Furthermore, nine per cent of logistics establishments report having at least one member of staff that is not fully proficient in their job (i.e. have a skills gap). Not having the skills at the appropriate levels can negatively impact the growth of the company.

Yet the sector is not world class when it comes to training. In terms of training days per annum per employee, the Logistics Sector only provides 2.7 days, this is the second least amount across all sectors. Furthermore, nearly half of logistics establishments had not funded or arranged any staff training in the previous 12 months.

There are a number of barriers which negatively impact logistics companies training decisions. These include; lack of funds, lack of information, difficulties accessing suitable training provision and difficulties releasing staff.

There are collective measures which have been identified to overcome these barriers, but the sector lacks these. One such measure is employer networks. Employer networks have been shown to be beneficial on a number of levels. They can help employers gain access to information about training and funding, employers can gather first-hand accounts of the benefits of training from other employers, which can be very persuasive. Evidence shows that an intermediary is needed to bring together the players necessary.

Skills for Logistics is well placed to work in the SEMLEP area and has piloted several products and approaches which effectively increased training and work opportunities.

7. Appendix

LEPs

LEPs which should consider Logistics to be a priority:

- Black Country
- Cheshire and Warrington
- Derby, Derbyshire, Nottingham and Nottinghamshire
- Enterprise M3
- Gloucestershire
- Greater Birmingham and Solihull
- Greater Manchester
- Hertfordshire
- London
- New Anglia
- North Eastern
- Oxfordshire
- South East
- Thames Valley Berkshire
- West of England
- Worcestershire
- York and North Yorkshire

Employment

Table 8 Logistics sub-sectors employment within SEMLEP

SIC	Definition	Employment	
		Number	%
Wholesale:			
46.1	Wholesale on a fee or contract basis	2,100	2%
46.2	Wholesale of agricultural raw materials and live animals	900	1%
46.3	Wholesale of food, beverages and tobacco	7,400	8%
46.4	Wholesale of household goods	12,000	13%
46.5	Wholesale of information and communication equipment	7,000	8%
46.6	Wholesale of agricultural machinery, equipment and supplies	8,200	9%
46.7	Other specialised wholesale	9,400	10%
46.9	Non-specialised wholesale trade	3,600	4%
52.10	Warehousing and storage	19,300	21%
49.41	Freight transport by road	10,700	12%
53.10	Postal activities under universal service obligations	5,400	6%
53.20	Other postal and courier activities	3,000	3%
52.29	Other transportation support activities (freight forwarding)	1,900	2%
49.42	Removal services	400	<1%
52.22	Service activities incidental to water transportation	200	<1%
49.20	Freight rail transport		
50.20	Sea and coastal freight water transport		
50.40	Inland freight water transport		
52.21	Freight air transport		
52.24	Cargo handling		
	Total SEMLEP Logistics Employment	91,700	

Source: Business Register and Employment Survey 2012 (Office for National Statistics, 2013)
* figure less than 100

Leading Logistics Companies

Table 9 Examples of key logistics organisations across SEMLEP

Area	Examples of key organisations
Bedford Borough	Argos – Marsh Leys Business Park Sainsburys – Marsh Leys Business Park ASDA Marsh Leys Business Park Movianto – Progress Park and G. Park Ark H Handling – Wilstead Ind Est
Central Bedfordshire	Amazon Fulfilment Centre AS Watson (Superdrug) Woodside Ind Est Bibby Distribution
Luton	Advanced Cargo System Ltd TNT (Express) DPD
Milton Keynes	John Lewis, Magna Park River Island, Magna Park Arvato Tesco, Fenny Lock Coca Cola, major logistics next to its factory AG Barr, major logistics next to its factory Amazon fulfilment Hub Kuehne & Nagel Culina Logistics Yusen Logistics Europe
Aylesbury Vale	PDX Logistics Aylesbury Logistics CJS Logistics Solution Saco Logistics Support Logistics Southern Logistics Brickfind Ltd TH Express Logistics Ltd Terry Cozens Logistics Ltd Bucks Sameday Logistics Ltd Envirologistics MPB Thermologistics Quadram logistics Sound Moves logistics Vent logistics
Cherwell	Kuehne & Nagel City Link Bidvest Logistics
Corby	C Butt Ltd – St James Ind Est RCS Logistics Willowbrook Ind Est Truck Wright Ltd Geddington Road Maxim Logistics
Daventry	NFT Archbold Logistics Limited DHL Service Point (Homebase)

Area	Examples of key organisations
Kettering	Knights of Old, Kettering Parkway Paragon Automotive Huxlowe Warehousing and Logistics Wincanton PLC Kettering Business Park Lombard Express, Telford Way Ind Est Wyvern Cargo, Venture Park Great Bear Distribution Centre
Northampton	Morrisons Levi Carlsberg Royal Mail Sainsburys DHL John Lewis Coca Cola British Pepper and Spice Asda Wickes Travis Perkins Panasonic Stanley Works
South Northamptonshire	Yusen Logistics (UK) Limited Europa Worldwide Logistics BSI (Road Haulage and transport services)
Wellingborough	TNT Express (UK) Ltd Gem Logistics

Table 10 Amount and location of affordable land for logistics and distribution operations

Area	Site Name	Location	Detail
Aylesbury Vale	N/A	N/A	
Bedford Borough	M1/A1 Central	Wixams, Bedford	20 acre Greenfield site planning permission for B8 up to 31,000 m2
	G. Park	Bedford	14.3 acre Greenfield remaining. Outline Planning permission
	Coronation Business Park	Bedford	10 acre vacant land site. Detailed approval with layout and floor plans
	Former Brickworks area	Stewartby	141 acre Brownfield site and a designated employment site
Central Bedfordshire	Marston Gate (Prologis Park)	Junction 13 Off the M1	Expansion land for development, 425,000 sq ft
	Woodside Estate	Dunstable	
Corby Borough	Corby Borough	Corby	228 hectares with opportunity for B8 storage on Willowbrook south
		Corby	29.52 ha previously granted PP for a strategic freight interchange
		Corby	28.9 ha with permission for a rail served warehouse and distribution

Area	Site Name	Location	Detail
Kettering Borough	Kettering South	Kettering	110ha Strategic Employment site but with infrastructure constraints (access to A14)
	Prologis Park	Kettering	15ha available but may be for general B use and non B use
	Magnetic Park	Desborough	6ha mixed use development with design and build options up to 150,000 sq ft
	Telford Way Ind Est	Kettering	Existing site with opportunities for B8
	A6	Burton Latimer	32.6ha identified in the SELA* that could be brought forward
	McAlpine Site	Pytchley Lodge	11ha site available for redevelopment
Milton Keynes	Magna Park	Between J13 & 14 of the M1	200 acres with planning consent for 4.4 million sq ft
	Centro	A5, Wymbush	10.4 acre site, with 220,000 sq ft building

Area	Site Name	Location	Detail
Northampton	Milton Ham	Junction 15a M1	10ha unimplemented site, had PP for mixed B1,B2,B8
	Land adjacent to Coca Cola		Unimplemented site that has potential for 40,000 sq m of distribution
	Kings Heath land/Lodge Farm		Unimplemented site that has potential for mixed use development with over 10,000 sq m of distribution (120 jobs)
	Swan Valley Way/Cobb Drive	Bedford Rd/Brackmills	20.4 ha allocated B use
	Abington lock/ Cattle market/ Rushmills / Gowerton/Reynoldstone	Junction 15a M1	24.0 ha allocated B use
	Milton Ham	Kings Park Rd	10 ha allocated B use
	Moulton Park		3.1 ha allocated B use
	King Heath		14 ha allocated B use
	Land at various locations Crow lane, St James, Far Cotton, Round Spinney, Town Centre		12.54 ha allocated B use

Area	Site Name	Location	Detail
South Northants	Grange Park	Saxon Way	348,000 sq ft scheme for potential distribution and office Development
	Brackley	Turweston Rd North	Outline Planning Permission for Mixed B use. B8 space not to exceed 40% of total development of 38,000sqm
	Towcester Sustainable Urban Extension	Towcester South	37100sqm for B1, B2,B8 No planning approvals yet in place.
	Silverstone Circuit	Silverstone	Outline Planning for mixed use including up to 58,928 of B8.
	Junction 16		Whilst the site is not allocated or identified the District Council is aware of developer interest for the development of logistics operations.
Wellingborough	Appleby Lodge	Park Farm Industrial Estate	2m sqft of warehousing and offices, potential to create 2,500 jobs

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