



Skills
Development
Scotland

Regional Skills Assessment
East Lothian
Local Authority Summary
Report

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1

Introduction

The Importance of Skills Planning in Scotland

Skills, alongside other wider and social and economic conditions, help to achieve the stated Scottish Government purpose of:

“creating a more successful country, with opportunities for all of Scotland to flourish, through increasing sustainable economic growth”

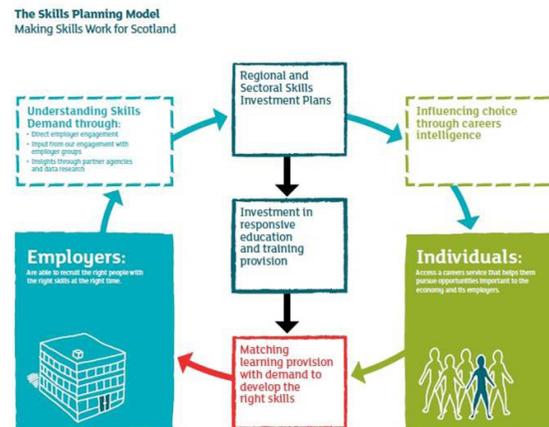
Significant public sector funding (some £2 billion) is invested annually to support skills development in Scotland. This, alongside employer and other partner investment, is a substantial resource and it is therefore important to ensure that robust evidence is developed and utilised to guide this investment.

Current Scottish Government Strategy for skills is in the form of a range of strategies such as Scotland’s Economic Strategy, Scotland’s Labour Market Strategy and Scotland’s Youth Employment Strategy and also the recent UK Industrial Strategy. These strategies, alongside the Scottish Skills Planning Model (Figure 1.1), influence skills investment.

The skills planning model is evolving. Phase 2 of the Enterprise and Skills Review that reported earlier this year included a range of proposals to achieve the dual goals of (1) a dynamic, inclusive globally competitive

economy and (2) a high performing, inclusive labour market. Work is ongoing on these proposals that include regional partnership models, learner journey models and, of most relevance to skills planning, proposals for skills alignment.

Figure 1.1
Scottish Skills Planning Model

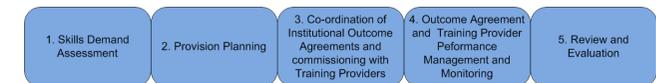


The vision for skills alignment is for “*skills services to be fully aligned to deliver the learning and skills necessary for sustainable and inclusive economic growth*”.

A project is in place to achieve this; the purpose of which is to align the relevant functions of the Scottish Funding Council (SFC) and Skills Development Scotland (SDS) to ensure that Scotland’s people and businesses are equipped with the right skills to succeed in the economy, not just now but in the future.

The proposals include the development of a Five Step Planning Model (Figure 1.2) and a Governance Structure (Figure 1.3).

Figure 1.2
Five Step Model

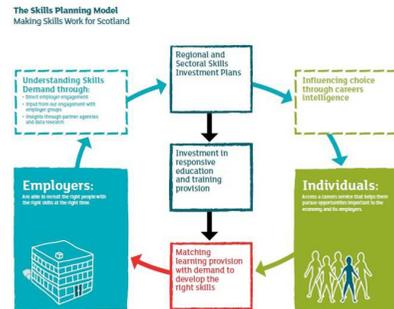


At the time of writing, SFC and SDS are engaged with Scottish Government to develop a detailed implementation plan to carry through the reforms identified. Work that has been agreed to take place in the short term includes:

- The development of Term of Reference (ToR) for the repurposed Skills Committee;
- The establishment of a Memorandum of Understanding to explore effective mechanics to deliver optimal skills planning alignment through utilisation of the Five Step Model. This will reference both the ToR for the repurposed Skills Committee and the governance diagram; and
- The development of the Five Step Model to confirm deliverables of each stage.

Evidence developed through Regional Skills Assessments now and in their future evolution can help inform Step One of the Five Step Model. This iteration, unlike in previous versions, focuses much more on demand side evidence to support Step One of the proposed planning process.

Figure 1.3
Governance



Regional Skills Assessments and Skills Planning

Regional Skills Assessments (RSAs) were first launched in 2014 and have evolved over time as a result of feedback from an independent review (2015 by the Training and Employment Research Unit) and ongoing partner consultation, as part of a process of continuous improvement. Their purpose is to

- Support partners in strategic skills investment planning including:
 - The two national skills agencies – SDS and SFC (in conjunction with Regional Colleges, Strategic Bodies and College Boards);
 - Enterprise Agencies and Regional and local partnerships; and
- Identify gaps in evidence that require to be addressed.

To ensure an inclusive approach to their development, dissemination and utilisation, RSAs are produced by SDS in partnership with Highlands and Islands Enterprise (HIE), Scottish Enterprise (SE), SFC and the Scottish Local Authorities Economic Development Group (SLAED). RSAs include the use of the most up to date published datasets. Inevitably, when using published data there is a time lag but the data contained is the most up to date available at the time of writing. Feedback from partners has indicated that an area of evidence they wished to see more was in

relation to forecasting. Given this, RSAs also include forecast data that has been commissioned through Oxford Economics. These forecasts are based on three factors:

- National/regional outlooks – all the forecasting models they operate are fully consistent with the broader global and national forecasts which are updated on a monthly basis;
- Historical trends in an area (which implicitly factor in supply side factors impinging on demand), augmented where appropriate by local knowledge and understanding of patterns of economic development; and
- Fundamental economic relationships which interlink the various elements of the outlook.

National Skills Issues

Prior to the publication of RSAs, SDS has published a national skills assessment 'Jobs and Skills in Scotland'. This report highlights key strengths of Scotland's skills alongside challenges to be addressed, as well as pointing to drivers that will have an impact on skills and skills planning and outlining potential forecasts for the future. Nationally, it is recognised that, following the recession:

- Employment in Scotland has recovered and is

above pre-recession levels;

- Many key sectors (see Appendix 2) have had good employment growth despite difficult trading conditions;
- Scotland has maintained a highly skilled workforce; and
- The economy offered a range of opportunities for young people after school.

That said, on demand for skills, growth rates for the Scottish economy remains behind that of the UK and, although productivity has improved, Scotland's record remains poor. Also, although employment has recovered since the recession we have seen:

- A rise in 'non standard' jobs - part time employment, self employment and non-permanent employment have grown;
- An 'hour glass' labour market structure which presents challenges for progression in the workplace, underemployment and under utilisation of skills; and
- Low pay and in-work poverty as of continuing concern.

The RSA Insight report points to key areas of uncertainty for the skills environment such as the impact of Brexit, productivity challenges, societal change and automation. It also provides some indicative forecasts for the future through modelling by Oxford Economics that highlight the potential:

- Political uncertainty is likely to restrict the pace of economic development in the short term, and this will curtail job creation. Growth is forecast to accelerate towards the end of this decade, but Scotland is projected to underperform the UK as a whole;
- Total employment in Scotland is forecast to rise by 84,800 by 2027, equivalent to an average annual growth rate of 0.3 per cent. The comparable figure for the UK is 0.5 per cent;
- The next decade (2017 to 2027 inclusive) will see a shift in the sectoral composition of employment in Scotland. Rising employment in Business services, Wholesale and retail trade, Construction and Health and social work will be accompanied by a reduction in Manufacturing and Public administration and defence;
- These sectoral changes will affect the occupational profile of Scotland's workforce. There will be an increase in the number of Elementary clerical

and service occupations and Business and public service professionals. But job losses in Manufacturing will see fewer Process, plant and machine operatives and Skilled metal and electrical trades; and

- Scotland's largest urban centres will lead job creation. Together, Edinburgh and Glasgow are forecast to account for three in every four new jobs created. Employment is forecast to fall in around a third of Scottish council areas over 2017 to 2027 (inclusive).

Local Authority Summary Report

To support the RSA, a Local Authority Summary report has also been created based on the RSA Insight report itself and the reader is referred to the Edinburgh, East and Midlothian RSA Insight report for further analysis, much of which has been done at the local authority level.

That being the case, this Local Authority Summary report focuses on the implications for skills planning in East Lothian.

2

Implications for Skills Planning



Implications for Skills Planning

As stated in the introduction, skills are but one factor in contributing to Scottish Government's aspiration of *"creating a more successful country, with opportunities for all of Scotland to flourish, through increasing sustainable economic growth."* Given this, we have focused this section on summarising issues and challenges for East Lothian from the main Edinburgh, East and Midlothian RSA Insight report, identifying gaps in evidence and also highlighting key areas of importance for skills planning. The reader is referred to the Edinburgh, East and Midlothian RSA Insight report for more of the analysis behind this summary.

Issues and Challenges for East Lothian

In terms of its people, the population of East Lothian is projected to increase by 18 per cent by 2039 (18,200 people) – this is more than two and half times the rate of increase forecast at the national level (seven per cent). The employment rate within the area (73 per cent) is the same as at the national level. Of the 283 datazones in East Lothian, none are classified as the most deprived.

Headlines on demand for skills¹ highlight that:

- Despite almost annual growth since 2011, total employment is forecast to decrease slightly over the next three years, although East Lothian is expected to return to annual growth from 2020 onwards;
- Total employment is forecast to rise to 34,500 by 2027, an increase of 900 (three per cent) on current levels (2017). This is equivalent to job growth of 0.3 per cent per annum, in line with the national average;

- Rising employment in the Construction and Professional, scientific and technical sectors by 2027 (by 300 jobs each) will more than offset forecast job losses in Manufacturing (300 jobs), Agriculture, and Public administration and defence (100 jobs each);
- These changes will be reflected in the occupational profile of the area, with Skilled construction and building trade, and Service-related occupations forecast to increase over the forecast period (by 100 jobs each);
- Replacement demand will result in job openings for 9,500 people over the forecast period, with most occupations forecast to increase as a result of replacement demand. The largest increases are forecast for Elementary clerical and service occupations, with 1,600 openings over the forecast period, and a further 1,300 job openings are expected in Sales occupations; and
- The forecast for key sectors² within East Lothian is in keeping with the broad sectoral trends, with Construction and Tourism both forecast to

increase by 300 jobs over the forecast period. Furthermore, Construction is the largest GVA generating key sector in the area, contributing 17 per cent of total key sector GVA in 2017.

¹ Note the forecast period for skills demand is defined as follows: Total employment: 2017 and 2027; Total Requirement: 2017 to 2027 (inclusive). The definitions used by Oxford Economics are detailed in Appendix 1.

² . For definitions of the key sectors, please see Appendix 2.

Gaps in data/Evidence

One of the purposes of RSAs is to highlight where there are gaps in evidence. We would point to five areas where we would suggest that further evidence is needed:

- **Drivers that affect skills** – The regional RSA reports highlight some potential areas where there is uncertainty and where a shared narrative for Scotland to assist planning would be helpful such as on Brexit, the productivity challenge, societal change and automation. The workstream on Skills Alignment provides an opportunity to develop a shared narrative on these issues and others that are deemed to be a priority;
- **Employer need** – In terms of published data, the main mechanism for establishing employer need has been through the two yearly Employer Skills Survey. The next Survey is due to report in 2018. In Scotland this is supplemented by employer engagement on sector and regional planning. It is important that employer need is fully considered in planning future provision;
- **Learner need** - Much of the emphasis in previous RSAs has been on demand from employers and it is proposed that a greater emphasis might be placed on learner need in future. Current work arising from the Enterprise and Skills Review on the Learner Journey and other workstreams may help meet this gap;
- **Equality issues** - Given Government policy on inclusive growth, a greater emphasis on equality and protected characteristics could feature more strongly in RSAs. Although gender features highly in our assessments, more could be done on highlighting evidence on other protected characteristics and socio-economic issues;
- **Qualifications** – With regard to forecasts for qualifications, for SCQF levels 7-10 these are grouped and cannot be broken down further. This is unfortunate for understanding how the balance of provision is distributed across qualifications as well as higher and further education institutions and is an important gap in the evidence. Advice from Oxford Economics is that this kind of breakdown is not currently possible due to lack of available data. This will be further investigated for the next iteration of RSAs; and
- **Outcomes** – A key aspiration of the Enterprise and Skills Review's Skills Alignment workstream is to deliver better outcomes from the skills system. Further work on this will be carried out, particularly in developing scope of Step Five of the Skills Alignment model; joint review and evaluation.

The skills system - ensuring provision is in line with demand

This assessment focuses on demand for skills and as such does not compare this with current provision. What follows is an outline of issues for public funders to consider in working with providers and employers in planning future investment in skills.

Occupations

Overall, East Lothian has a slightly greater share of both higher level occupations (44 per cent compared with 43 per cent at SOC 1-3) and intermediate skilled occupations (37 per cent compared with 31 per cent at SOC4-6) than the national average, with a smaller share of lower skilled jobs (SOC 7-9 – 20 per cent compared to 27 per cent).

One quarter of the total requirement by 2027 will be in Professional occupations (2,400 people) – in part, supporting forecast employment increase in the Professional, scientific and technical sector (300 jobs, ten per cent increase). If we aggregate total requirement in East Lothian into high (SOC 1-3), intermediate (SOC 4-6) and low (SOC 7-9) skills groupings, this takes on something of an hourglass shape, with demand highest at the top and bottom (35 per cent and 37 per cent, respectively), and smaller demand in the middle (28 per cent).

Whilst skills investment policy can look to how it meets demand for this occupational structure there

is a concern that, this alone, will not stimulate the inclusive growth approach desired for a successful region. To address this it is suggested that a twin track approach is needed:

- To ensure that provision meets current and projected demand; and
- That the skills system works in tandem with a wider economic strategy where skills investment can play its part in helping to drive up inclusive growth and productivity.

Sectors

In 2017, total employment in East Lothian was 33,600, with the largest employing sectors being:

- Human health and social work (5,300 jobs, 16 per cent of total employment);
- Wholesale and retail trade (4,000 jobs, 12 per cent);
- Education (3,400 jobs, ten per cent); and
- Accommodation and food service activities (2,900 jobs, nine per cent).

A number of changes are forecast by 2027, with the largest employment growth forecast in the Professional, scientific and technical and Construction

sectors (both of 300 jobs). The largest forecast employment decreases will be in Manufacturing and Primary industries, both of 300 jobs.

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With regard to skills investment in sectors there are several areas that can be considered in aligning provision with demand:

- **Projected decline in Manufacturing and Primary industries** – Employment within both the Manufacturing sector and Primary industries is forecast to decrease by 300 jobs in each sector. Currently, these are relatively large employing sectors within the area, accounting for 2,200 and 2,900 jobs, respectively. As such, there remains a need to ensure that people are aware of, and able to progress into, alternative opportunities as well as supporting the workforce already in this sector via initiatives such as Partnership Action for

² Comprising Agriculture, forestry and fishing; Mining and quarrying; Electricity, gas, steam and air conditioning supply; and Water supply, sewerage and waste management.

Continuing Employment (PACE). Any indication of actual employment destination by gender would help identify to what extent those currently going into skilled trades and manual employment are likely to be affected. That said, the nature of any future Manufacturing employment may change, requiring higher skill levels if there is growth in industries such as Advanced manufacturing;

- **Prepare for increased demand for workers in the Health and social work sector** – Health and social work is the largest employing sector within the area, with further moderate growth forecast over the forecast period, and consideration should be given to exactly what this increased demand will look like East Lothian. It is likely that demand on this sector will increase – possibly substantially – over the coming years, given that the Scottish Government has announced its expansion of free early learning and childcare by nearly doubling the current entitlement of 600 hours per year to 1,140 for all three and four year olds by 2020. This is likely to have significant implications for the Health and social care workforce, with increased demand for nurseries, day care facilities and childminders. As forecasts do not take account of policy changes such as this, it is possible that sectoral employment may need to increase even more than the forecasts predict, to cope with increasing demand. Local provision will need to be geared up to meet this demand and this should be

at all stages of the skills pipeline, including at all stages of Further and Higher Education provision;

- **STEM and high skills** - There should be an approach to developing high skills and the high skilled jobs necessary to absorb them. The Scottish Government STEM strategy and the requirement for 1,100 people in Science and technology professionals/Associate professional roles by 2027 imply the existence of an intellectual capital and the opportunities to create higher level jobs;
- **Data and digital skills** – These skills are cross-cutting across all sectors, and becoming increasingly important. Employment within the Information and communication sector is forecast to increase by ten per cent over the forecast period; of further significance, Digital technologies will continue to become embedded across all jobs and sectors. As such, there may be a need to ensure appropriate training provision to upskill and reskill people in what were traditionally non-digital industries. Developing these skills is also important in promoting economic inclusion across East Lothian – some disadvantaged people may face challenges in accessing the tools required to develop these skills and it is important to ensure the equality of opportunity for all;

- **Relative importance of the Construction sector** – Construction is the largest GVA generating key sector in the area, contributing 17 per cent of total key sector GVA in 2017. Whilst it employs just seven per cent of the total workforce (2,400 jobs), this is forecast to increase by 11 per cent (300 jobs) over the forecast period – the joint largest forecast increase of any sector within East Lothian. Further, the local employment and business base may benefit from the significant infrastructure projects which will be developed through Edinburgh and South East Scotland City Deal funding. To help maximise the growth potential of the sector in East Lothian, there is a need for industry to work in partnership with schools and education institutions to highlight the attractiveness of the sector – particularly to females, who comprise less than two per cent of construction trade workers. Research undertaken by Equate Scotland suggests that there is a need to increase opportunities for women in construction, as well as changing the perceptions of employers with regards to diversifying their workforce. Whilst these recommendations apply to Scotland as a whole, local employers and stakeholders could benefit from adopting these steps; and

- **Lower skill sectors** – For sectors such as Construction and Administrative and support services where employment is forecast to increase, provision will need to take into account the often low skilled nature of these sectors and to what extent some types of jobs are better served through more flexible approaches such as work based learning routes.

Qualifications

In relation to total requirement - that is actual openings - there is a shift towards demand for higher level qualifications within East Lothian. Of the 9,500 total requirement for people within the area by 2027, just over half (4,800) are expected to be at SCQF level 7 or above, with a further 38 per cent (3,600 people) at intermediate level (SCQF 5-6). There will be far more limited demand for those with low (four per cent, 400 people) or no qualifications (eight per cent, 800).

This is inconsistent with the occupational demand forecast, with just 35 per cent of the total requirement by 2027 being in highly skilled roles, and 37 per cent in lower skilled roles (SOC 7-9). That said, by 2027, the occupational profile of East Lothian will remain an inverted triangular shape, with the highest number of employees in higher skilled jobs (44 per cent), and the lowest share in low skilled jobs (20 per cent).

Oxford Economics Forecast and Projections: Competing Assumptions?

The forecasts by sector, by occupation and by qualification have some tensions between them, possibly due to different assumptions built into each. The projected trend in qualifications is to high-intermediate skills; in occupations, however, the projected trend is to low-high skills, an hourglass structure. If the total requirement for intermediate occupations is relatively low, why is the need for intermediate qualifications so high?

With over one third of forecast total requirement tending towards lower skilled occupations (37 per cent in SOC 7 – 9 occupations), coupled with growth in sectors such as Administrative and support services, and Other services, we may see something of a shift from intermediate roles to low paid, mass services.

Skills Utilisation

For those that do go on to higher level occupations and qualifications, the problem is to what extent these will be effectively utilised.

- As Edinburgh, East and Midlothian Insight report shows East Lothian is a low GVA/low productivity local authority. Are workplaces in East Lothian able to absorb these high skills effectively? This requires employer investment in skills and training and a recognition of the value of higher level skills to their business; and

- Higher skills tend to be more mobile and commute or migrate out of an area; that is, migrating out to other cities or regions (e.g. after graduation) or concentrating in more affluent, commuting areas. Currently, 56 per cent of those from East Lothian commute out of the area for work, with 47 per cent of all commuters going to Edinburgh, more typically for higher skilled jobs. As the forecasts predict growth in higher skills, there is a subsequent need to ensure that there is a suitable range of employment opportunities within East Lothian to retain these skills and even attract new, highly skilled people to the area. This can help to create more highly paid jobs, which can increase economic output and generate economic growth.

How skills are utilised and retained within the region is equally as important then as trying to raise skill levels.

Conclusions

This Local Authority Summary report has looked at the implications for skills planning in East Lothian, focusing on its issues and challenges, gaps in the data and evidence; and an outline of issues for public funders to consider in working with providers and employers in planning future investment in skills.

Some of the issues and challenges section for East Lothian highlighted over the forecast period (2017-2027 inclusive) are:

- Its annual employment growth rate is forecast to be in line with the Scottish average;
- Its sectoral performance will vary over the period, with notable increases forecast in Professional, scientific and technical activities and Construction sectors (of 300 jobs, each), and decreases in Manufacturing and Primary industries (by 300 jobs each); and
- It is forecast to see limited expansion demand over the forecast period, meaning job openings will be driven mostly by replacement demand

In terms of these forecasts, some key issues for skills planning are likely to be:

- Increased demand for workers in the Health and Social Work sector;;
- A forecast decline in Manufacturing and the Private instemployment, an issue especially given the importance of those sectors currently; and
- The need to replace workers in the Wholesale and retail trade and Agriculture, forestry and fishing sectors, taking into account the often low skilled nature of those sectors.

Whilst skills investment policy can look to how it meets demand there is a concern that, this alone, will not stimulate the inclusive growth approach desired for a successful region. To address this it is suggested that a twin track approach is needed:

- To ensure that provision meets current and projected demand; and
- That the skills system works in tandem with a wider economic strategy where skills investment can play its part in helping to drive up inclusive growth and productivity.

Working with the Edinburgh and South East Scotland Regional Skills Investment Plan and the Edinburgh and South East Scotland City Region Deal in this way will help to achieve the Scottish Government aspiration of:

“creating a more successful country, with opportunities for all of East Lothian to flourish, through increasing sustainable economic growth”

Note: if you have any comments or feedback on this report, please contact rsa@sds.co.uk.

Appendix 1: Oxford Economics Definitions

Variable	Definition
GVA	The value of goods and services produced in an area.
Total employment (jobs)	Workplace based Jobs; annual average. This includes anyone who is aged 16 and over who holds a job, whether as an employee, self-employed, Government Supported Trainee or within Her Majesty's Forces.
Male full-time employment (jobs)	The number of full-time jobs (more than 30 hours per week), held by males.
Male part-time employment (jobs)	The number of part-time jobs (30 hours or less per week), held by males.
Female full-time employment (jobs)	The number of full-time jobs (more than 30 hours per week), held by females.
Female part-time employment (jobs)	The number of part-time jobs (30 hours or less per week), held by females.
Total employment (people)	Total number of people aged 16 plus who work in an area.
Productivity	GVA per job; workplace based.
GVA by industry	The value of goods and services produced by each SIC 2007 based sector.
Total employment by industry (jobs)	Workplace based jobs within each SIC 2007 based sector; annual average.
Total employment by occupation (people)	The number of workers within each SOC 2010 based occupation grouping. The results are also presented on a workplace basis; annual average.
Expansion demand by occupation (people)	The net change in occupation employment over the forecast period and can therefore be a positive or negative figure.
Replacement demand by occupation (people)	The sum of leavers from employment plus net occupation mobility and represents how many workers will be required at each level due to labour market churn.
Total requirement by occupation (people)	The sum of expansion demand and replacement demand.
Total employment by qualification (people)	The number of workers within each SCQF qualification level. The results are also presented on a workplace basis; annual average.
Expansion demand by qualification (people)	The net change in occupation employment by SCQF qualification level.
Replacement demand by qualification (people)	The sum of leavers from employment plus net occupation mobility by SCQF qualification level.
Total requirement by qualification (people)	The sum of expansion demand and replacement demand by SCQF qualification level.
Total employment by industry and occupation (people)	The number of workers within each SIC 2007 sector and SOC 2010 based occupation grouping. The results are also presented on a workplace basis; annual average.

Variable	Definition
Total employment by occupation by qualification (people)	The number of workers within each SOC 2010 based occupation grouping and SCQF qualification level. The results are also presented on a workplace basis; annual average.
Expansion demand by industry (jobs)	The net change in industry employment over the forecast period and can therefore be a positive or negative figure.
Replacement demand by industry (jobs)	The sum of leavers from employment plus net industry mobility and represents how many workers will be required at each level due to labour market churn.
Total requirement by industry (jobs)	The sum of expansion demand and replacement demand.
Total employment by key sector and occupation (people)	The number of workers within each key sector and SOC 2010 based occupation grouping. The results are also presented on a workplace basis; annual average.

Appendix 2: Key Sector Definitions

SIC 2007 code	Description	Attributable Activity
Financial and Business Services		
64.1	Monetary intermediation	100%
64.3	Trusts, funds and similar financial entities	100%
64.9	Other financial service activities, except insurance and pension funding	100%
65	Insurance, reinsurance and pension funding, except compulsory social security	100%
66	Activities auxiliary to financial services and insurance activities	100%
69.1	Legal activities	100%
69.2	Accounting, bookkeeping and auditing activities; tax consultancy	100%
70.2	Management consultancy activities	100%
71.129	Other engineering activities (not including engineering design for industrial process and production or engineering related scientific and technical consulting activities)	100%
73.2	Market research and public opinion polling	100%
74.3	Translation and interpretation activities	100%
78.109	Activities of employment placement agencies (other than motion picture, television and other theatrical casting) n.e.c.	100%
78.3	Other human resources provision	100%
82.1	Office administrative and support activities	100%
82.2	Activities of call centres	100%
82.30	Organisation of conventions and trade shows	100%
82.91	Activities of collection agencies and credit bureaus	100%
82.99	Other business support service activities n.e.c.	100%

Chemical Sciences		Attributable Activity
20.11	Manufacture of industrial gases	100%
20.12	Manufacture of dyes and pigments	100%
20.13	Manufacture of other inorganic basic chemicals	100%
20.14	Manufacture of other organic basic chemicals	100%
20.15	Manufacture of fertilisers and nitrogen compounds	100%
20.16	Manufacture of plastics in primary forms	100%
20.17	Manufacture of synthetic rubber in primary forms	100%
20.20	Manufacture of pesticides and other agrochemical products	100%
20.30/1	Manufacture of paints, varnishes and similar coatings, mastics and sealants	100%
20.30/2	Manufacture of printing ink	100%
20.41/1	Manufacture of soap and detergents	100%
20.41/2	Manufacture of cleaning and polishing preparations	100%
20.51	Manufacture of explosives	100%
20.52	Manufacture of glues	100%
20.53	Manufacture of essential oils	100%
20.59	Manufacture of other chemical products n.e.c.	100%
20.60	Manufacture of man-made fibres	100%
21.1	Manufacture of basic pharmaceutical products	100%
21.2	Manufacture of pharmaceutical preparations	100%

Creative industries		
73.11	Advertising agencies	100%
73.12	Media representation	100%
71.11	Architectural activities	100%
90.03	Artistic creation	70%
47.78/1	Retail sale in commercial art galleries	100%
31.09	Manufacture of other furniture	100%
16.29	Manufacture of other wood products	30%
32.12	Manufacture of jewellery and related products	100%
32.13	Manufacture of imitation jewellery and related articles	100%
23.41	Manufacture of ceramic household and ornamental articles	35%
23.49	Manufacture of other ceramic products	35%
23.13	Manufacture of hollow glass	15%
23.19	Manufacture of other glass	15%
47.79/1	Retail sale of antiques and antique books	100%
95.24	Repair of furniture and home furnishings	100%
13	Manufacture of textiles	25%
14	Manufacture of wearing apparel	20%
15	Manufacture of leather and related products	20%
74.1	Specialised design activities	25%
71.12/1	Engineering design activities for industrial process and production	100%
74.1	Specialised design activities	75%
90.01	Performing arts	100%
90.02	Support activities to performing arts	100%

90.04	Operation of arts facilities	100%
78.10/1	Motion picture, television and other theatrical casting	100%
59.2	Sound recording and music publishing activities	100%
18.20/1	Reproduction of sound recording	100%
32.2	Manufacture of musical instruments	100%
74.20/1	Portrait photographic activities	100%
74.20/2	Other specialist photography (not including portrait photography)	100%
74.20/9	Other photographic activities (not including portrait and other specialist photography and film processing) n.e.c.	100%
18.20/2	Reproduction of video recording	100%
59.11/1	Motion picture production activities	100%
59.11/2	Video production activities	100%
59.12	Motion picture, video and television programme post-production activities	25%
59.13/1	Motion picture distribution activities	100%
59.13/2	Video distribution activities	100%
59.14	Motion picture projection activities	100%
58.21	Publishing of computer games	100%
62.01/1	Ready-made interactive leisure and entertainment software development	100%
59.11/3	Television programme production activities	100%
59.13/3	Television programme distribution activities	100%
59.12	Motion picture, video and television programme post-production activities	75%
60.1	Radio broadcasting	100%
60.2	Television programming and broadcasting activities	100%
90.03	Artistic creation	30%
58.11	Book publishing	100%

58.13	Publishing of newspapers	100%
58.14	Publishing of journals and periodicals	100%
58.19	Other publishing activities	100%
18.11	Printing of newspapers	100%
18.129	Other printing (not labels)	100%
18.13	Pre press and media services	100%
63.91	News agency activities	100%
91.01	Libraries and archive activities	100%
58.29	Other software publishing	100%
62.01/2	Business and domestic software development	100%
62.02	Computer consultancy activities	100%
85.52	Cultural Education	100%

Construction		
02.2	Logging	20%
08.11	Quarrying of ornamental and building stone, limestone, gypsum, chalk and slate	70%
08.12	Operation of gravel and sand pits; mining of clays and kaolin	70%
16.23	Manufacture of other builders' carpentry and joinery	40%
20.30/1	Manufacture of paints, varnishes and similar coatings, mastics and sealants	25%
20.30/2	Manufacture of printing ink	25%
22.11	Manufacture of rubber tyres and tubes; retreading and rebuilding of rubber tyres	20%
22.19	Manufacture of other rubber products	20%
22.23	Manufacture of builders' ware of plastic	35%
23.32	Manufacture of bricks, tiles and construction products, in baked clay	85%
23.41	Manufacture of ceramic household and ornamental articles	60%
23.42	Manufacture of ceramic sanitary fixtures	60%
23.43	Manufacture of ceramic insulators and insulating fittings	60%
23.44	Manufacture of other technical ceramic products	60%
23.49	Manufacture of other ceramic products	60%
23.51	Manufacture of cement	25%
23.52	Manufacture of lime and plaster	25%
23.61	Manufacture of concrete products for construction purposes	90%
23.62	Manufacture of plaster products for construction purposes	90%
23.63	Manufacture of ready-mixed concrete	90%
23.64	Manufacture of mortars	90%
23.65	Manufacture of fibre cement	90%
23.69	Manufacture of other articles of concrete, plaster and cement	90%

25.11	Manufacture of metal structures and parts of structures	60%
25.12	Manufacture of doors and windows of metal	60%
25.21	Manufacture of central heating radiators and boilers	40%
25.29	Manufacture of other tanks, reservoirs and containers of metal	40%
25.3	Manufacture of steam generators, except central heating hot water boilers	40%
26.11	Manufacture of electronic components	35%
41.10	Development of building projects	100%
41.20/1	Construction of commercial buildings	100%
41.20/2	Construction of domestic buildings	100%
42.11	Construction of roads and motorways	100%
42.12	Construction of railways and underground railways	100%
42.13	Construction of bridges and tunnels	100%
42.21	Construction of utility projects for fluids	100%
42.22	Construction of utility projects for electricity and telecommunications	100%
42.91	Construction of water projects	100%
42.99	Construction of other civil engineering projects n.e.c.	100%
43.11	Demolition	100%
43.12	Site preparation	100%
43.13	Test drilling and boring	100%
43.21	Electrical installation	100%
43.22	Plumbing, heat and air-conditioning installation	100%
43.29	Other construction installation	100%
43.31	Plastering	100%
43.32	Joinery installation	100%

46.73	Wholesale of wood, construction materials and sanitary equipment	50%
71.11/1	Architectural activities	100%
71.11/2	Urban planning and landscape architectural activities	50%
71.12/1	Engineering design activities for industrial process and production	50%
71.12/2	Engineering related scientific and technical consulting activities	50%
71.12/9	Other engineering activities (not including engineering design for industrial process and production or engineering related scientific and technical consulting activities)	50%
74.90/2	Quantity surveying activities	100%

Energy		
05	Mining of coal and lignite	100%
06	Extraction of crude petroleum and natural gas	100%
09	Mining support service activities	100%
19	Manufacture of coke and refined petroleum products	100%
20.14	Manufacture of other organic basic chemicals	100%
35	Electricity, gas, steam and air conditioning supply	100%
36	Water collection, treatment and supply	100%
38.22	Treatment and disposal of hazardous waste	100%
71.12/2	Engineering related scientific and technical consulting activities	100%
74.90/1	Environmental consulting activities	100%

Engineering		
24	Manufacture of basic metals	100%
25	Manufacture of fabricated metal products, except machinery and equipment	100%
26	Manufacture of computer, electronic and optical products	100%
27	Manufacture of electrical equipment	100%
28	Manufacture of machinery and equipment n.e.c.	100%
29	Manufacture of motor vehicles, trailers and semi-trailers	100%
30	Manufacture of other transport equipment	100%
33	Repair and installation of machinery and equipment	100%
71	Architectural and engineering activities; technical testing and analysis	100%
72.19	Other research and experimental development on natural sciences and engineering	100%
13.94	Manufacture of cordage, rope, twine and netting	100%
38.31	Dismantling of wrecks	100%

Food and Drink		
01	Crop and animal production, hunting and related service activities	100%
03	Fishing and aquaculture	100%
10	Manufacture of food products	100%
11	Manufacture of beverages	100%

Health and Social Care		
86.1	Hospital activities	100%
86.21	General medical practice activities	100%
86.22	Specialist medical practice activities	100%
86.23	Dental practice activities	100%
86.9	Other human health activities	100%
87.1	Residential nursing care activities	100%
87.2	Residential care activities for learning disabilities, mental health and substance abuse	100%
87.3	Residential care activities for the elderly and disabled	100%
87.9	Other residential care activities	100%
88.1	Social work activities without accommodation for the elderly and disabled	100%
88.91	Child day-care activities	100%
88.99	Other social work activities without accommodation n.e.c.	100%

ICT/Digital		
18.20/3	Reproduction of computer media	100%
26.11	Manufacture of electronic components	100%
26.12	Manufacture of loaded electronic boards	100%
26.20	Manufacture of computers and peripheral equipment	100%
26.30	Manufacture of communication equipment	100%
26.40	Manufacture of consumer electronics	100%
26.8	Manufacture of magnetic and optical media	100%
27.31	Manufacture of fibre optic cables	100%
58.21	Publishing of computer games	100%
58.29	Other software publishing	100%
61.1	Wired telecommunications activities	100%
61.2	Wireless telecommunications activities	100%
61.3	Satellite telecommunications activities	100%
61.9	Other telecommunications activities	100%
62.01	Computer programming activities	100%
62.02	Computer consultancy activities	100%
62.03	Computer facilities management activities	100%
62.09	Other information technology and computer service activities	100%
63.11	Data processing, hosting and related activities	100%
63.12	Web portals	100%
63.99	Other information service activities n.e.c.	100%
95.11	Repair of computers and peripheral equipment	100%
95.12	Repair of communication equipment	100%

Life Sciences		
21	Manufacture of basic pharmaceutical products and pharmaceutical preparations	100%
26.6	Manufacture of irradiation, electromedical and electrotherapeutic equipment	100%
32.5	Manufacture of medical and dental instruments and supplies	100%
72.11	Research and experimental development on biotechnology	100%
72.19	Other research and experimental development on natural sciences and engineering	100%

Tourism		
55.1	Hotels and similar accommodation	100%
55.2	Holiday and other short-stay accommodation	100%
55.3	Camping grounds, recreational vehicle parks and trailer parks	100%
56.1	Restaurants and mobile food service activities	100%
56.3	Beverage serving activities	100%
79.12	Tour operator activities	100%
79.9	Other reservation service and related activities	100%
91.02	Museum activities	100%
91.03	Operation of historical sites and buildings and similar visitor attractions	100%
91.04	Botanical and zoological gardens and nature reserve activities	100%
93.11	Operation of sports facilities	100%
93.19/9	Other sports activities (not including activities of racehorse owners) n.e.c.	100%
93.21	Activities of amusement parks and theme parks	100%
93.29	Other amusement and recreation activities	100%
63.99	Other information service activities n.e.c.	100%
95.11	Repair of computers and peripheral equipment	100%
95.12	Repair of communication equipment	100%

