Regional Skills Assessment
Dumfries and Galloway
Summary Report 2019
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Regional Skills Assessments (RSAs)

First launched in 2014, the RSA’s purpose is to provide a robust evidence base to support partners in strategic skills investment planning. They have evolved over time based on an independent review carried out in 2015 and feedback from partners.

To ensure an inclusive approach to their development, dissemination and utilisation, RSAs are produced by Skills Development Scotland (SDS) in partnership with Highlands and Islands Enterprise, Scottish Enterprise, Scottish Government, the Scottish Funding Council (SFC), the Scottish Local Authorities Economic Development Group and the South of Scotland Economic Partnership.

RSAs include forecast data that has been commissioned through Oxford Economics. A number of caveats need to be applied when using forecast data. The Technical Note\(^1\) provides full detail on this but broadly it should be noted that forecasts are based on what we know now and include past and present trends projected into the future. Their value is in identifying likely directions of travel rather than predicting exact figures. The more disaggregated they become, especially at smaller geographical units, the less reliable they are likely to be. Standard occupational classifications (SOC) and standard industrial classifications (SIC) are used to define occupations and industries. ONS has useful SIC\(^2\) and SOC\(^3\) hierarchy tools that can be used to understand the classifications in more detail.

In addition, we provide analysis by Key Sector. Key Sectors are central to our Skills Investment Planning approach. Each Key Sector has a tailored Skills Investment Plan (SIP) which gives a picture of the economic and labour market situation, trends in skills and qualification supply and employers’ perspectives on the big skills issues affecting sector growth. Regional SIPs have also been developed. SIPs and RSIPs are available on the SDS website\(^4\).

This year’s RSA is in three parts:

1. This report outlining Demand for Skills, Supply of People; and Skills Mismatches;
2. An infographic detailing key data for the area; and
3. A new interactive RSA Data Matrix\(^5\) that was launched in August 2019 that provides more detailed data.

Finally, in the sections which follow, the numbers and figures in the body of the text are rounded for ease of reference and readability and therefore may differ slightly from:

- The Oxford Economics data in the RSA Data Matrix; and
- The accompanying charts in the report which are also based on the Oxford Economics data.

This RSA report is for the Dumfries and Galloway region which consists of the Dumfries and Galloway local authority.

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1. [https://www.skillsdevelopmentscotland.co.uk/what-we-do/skills-planning/regional-skills-assessments/](https://www.skillsdevelopmentscotland.co.uk/what-we-do/skills-planning/regional-skills-assessments/)
5. [https://www.skillsdevelopmentscotland.co.uk/what-we-do/skills-planning/regional-skills-assessments/](https://www.skillsdevelopmentscotland.co.uk/what-we-do/skills-planning/regional-skills-assessments/)
Introduction
Introduction
We live in a world that is complex and is constantly evolving. Scotland’s businesses and people need the skills, knowledge and capabilities, not just to cope with this change but to thrive in it and influence it.

Scotland’s Economy
The latest ‘State of the Economy’ reported that Scotland’s economy continued its recent pattern of strong performance at the start of 2019 with the unemployment rate falling to record lows and strong growth in exports and output. Output growth increased in the first quarter to 0.5 per cent but this was driven partly due to temporary factors such as stockpiling and firms completing orders in anticipation of the original end March Brexit deadline. Short term outlooks for the economy will be dominated by Brexit uncertainty with the likelihood of subdued growth and the potential for more exposure to downturns in international demand and growth.

Labour productivity grew by 0.5 per cent in Q4 2018 and by 3.8 per cent in 2018 as a whole – its fastest pace of growth since 2010. Whilst positive, Scotland’s ranking among Organisation for Economic Co-operation and Development (OECD) countries is 16th of 37 countries, placing it in the second quartile. This ranking of 16th place has been unchanged since 2007. Scottish Government has the aspiration of improving Scotland’s productivity to match the performance of the top quartile of OECD countries.

Boosting productivity is vital for our long-term prosperity

Scotland’s People
Scotland’s population has grown and is projected to grow in future. National Records of Scotland (NRS) confirms that Scotland’s population in 2018 was 5,438,100 and is expected to grow to 5.58 million in 2026 and to 5.69 million by 2041. This estimate for growth is based on a continuation of EU migration at pre-Brexit levels which is not guaranteed.

Despite this past and projected growth, Scotland is facing an ageing demographic structure. Based on the population in 2016, just under one in five people (18 per cent) were aged 65 and over but by 2041, one in four people (25 per cent) are projected to be in this age group.

If we examine dependency ratios for Scotland’s population this shows a growing dependency ratio at Scotland level and indeed some areas – particularly some of Scotland’s rural areas – having much higher rates of dependency than the national average. At Scotland level, the dependency ratio will increase from 55 per cent in 2016 to almost 70 per cent in 2041. Put simply, for every 100 people of working age there will be 70 people dependent by 2041.

This suggests that the supply of labour might contract over the longer term if projections are realised. This points to a tighter labour market and greater competition for skilled labour in the future. Uncertainty regarding the implications of Brexit also remain, and any decisions taken on the free movement of people could exacerbate this further.

A tight labour market will result in more competition for skilled labour – Brexit could exacerbate this
Although we are seeing record levels in relation to high employment and low unemployment and relative economic prosperity since the recession, not everyone is benefitting equally in this prosperity:

- The gender pay gap for women working full-time in Scotland was 5.7 per cent in 2018\textsuperscript{12}.
- The unemployment rate was 4.2 per cent for working age people in Scotland, but this increases to 9.9 per cent for 16-24 year olds and to 10.8 per cent for males aged 16-24\textsuperscript{13}.
- The employment rate for people aged 16-64 was 74.5 per cent, but 57.4 per cent for people from an ethnic minority and 45.9 per cent for disabled people\textsuperscript{14}.

There are disparities in regional performance across Scotland. Based on an assessment of employment growth, productivity, earnings and unemployment, recovery since the recession has been stronger in Scotland’s urban areas and weaker in rural areas.

Since the recession we have seen a rise in ‘nonstandard’ jobs (such as part time and temporary employment), low wage growth and continued ‘in work’ poverty:

- Self-employment has risen by 22 per cent, compared to one per cent for full-time employment since the recession\textsuperscript{15}.
- Median weekly earnings (gross) grew by 19 per cent in the five years leading up to the financial crash in 2008. A slower rate of 11 per cent has occurred over the past five years\textsuperscript{16}.
- More than half a million (550,000) people in Scotland were living in relative poverty (after housing costs) in a household where at least one adult was in paid employment\textsuperscript{17}.

Both people and place are considerations when working towards a more inclusive labour market.

**Our growth needs to be inclusive**

**Scotland’s Response to the Climate Emergency**

In April 2019, Scotland’s First Minister declared a climate change emergency with targets being set to reduce greenhouse gas emissions to net-zero by 2045. In May 2019, Scotland’s Climate Change Secretary set out Scotland’s response to the climate change emergency including action such as:

- A change in approach to airport departure tax;
- Funding to strengthen the rail freight industry and reduce the amount of freight that travels by road; and
- A new farmer-led initiative to drive low-carbon, environmentally sustainable farming practices.

The Cabinet Secretary for Environment, Climate Change and Land Reform confirmed that Scottish Government will be “placing climate change at the heart of everything we do”\textsuperscript{18} and this is at the core of the recently published Programme for Government.

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\textsuperscript{13} Annual Population Survey (April 2018-March 2019)
\textsuperscript{14} Annual Population Survey (April 2018-March 2019), EA core disabled has been used for the employment rate of disabled people.
All parts of Government will be expected to play a role in achieving these ambitious targets and SDS is to develop a Climate Emergency Skills Action Plan, as outlined in the Programme for Government. The development of appropriate skills will have a significant part to play in enabling this transition to a low carbon economy.

Our growth needs to be sustainable

*Scotland's Resilience*

The world of work is constantly changing and the rate of change is rapid. Technological and societal disruptions are occurring at an increasing pace. Whilst we cannot predict the future, we can prepare for a future that is increasingly unpredictable. SDS has developed a Skills 4.0 model that focuses on developing ‘meta-skills’ to equip people with skills in resilience to thrive in a complex and ever-changing world (see *Figure 1*).

We need skills for resilience to thrive in a complex and ever-changing world

*Figure 1: Skills 4.0*

https://www.skillsdevelopmentscotland.co.uk/what-we-do/skills-planning/skills4-0/
**Issues and Challenges**
A fit for purpose, skilled workforce will be essential to address the challenges facing Scotland (see Figure 2).

The development of skills that are fit for Scotland now and in the future is essential to achieving a high performing, inclusive and sustainable labour market. To meet these challenges, a step change in how we align skills provision to meet labour market demand is planned.

**Figure 2: Drivers for change**

<table>
<thead>
<tr>
<th>Scotland’s Economy</th>
<th>Scotland’s People</th>
<th>Scotland’s Climate Change Emergency</th>
<th>Scotland’s Resilience</th>
</tr>
</thead>
<tbody>
<tr>
<td>Boosting productivity is vital for our long-term prosperity</td>
<td>A tight labour market</td>
<td>Our growth needs to be sustainable</td>
<td>We need skills for resilience to thrive in a complex and ever-changing world</td>
</tr>
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**Scotland’s Skills Issues**

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<tbody>
<tr>
<td>We need innovative workplaces and skills to boost productivity with employers and employees as active participants in the skills system</td>
<td>We need to maximise Scotland’s indigenous talent and attract new talent to fill jobs in future. We need to enable all of Scotland’s people to share in the nation’s prosperity</td>
</tr>
<tr>
<td>We need to develop fit for purpose skills to enable Scotland to achieve its ambitious target for greenhouse gas emissions</td>
<td>We need to develop sector specific skills for the economy and skills for resilience – ‘meta skills’</td>
</tr>
</tbody>
</table>

**To support this we will need:**
Greater flexibility and responsiveness in skills provision to better align with the needs of employers and the Scottish economy
Investment in upskilling and reskilling throughout individual’s careers to respond to a rapidly changing environment
More personalised, relevant and flexible work-based pathways

Source: Skills Development Scotland
Scotland’s Skills Alignment Ambition
Skills Alignment (one of the workstreams in the Scottish Government’s Future Skills Action Plan) is focused on improving the skills system in Scotland.

Its purpose is “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.” To achieve this end, a new joint planning process is in development to align the relevant functions of SDS and the SFC (see Figure 3).

To lead this process a Director of Skills Alignment has recently been appointed and three pilot projects have been established to test approaches in:
- Regions – Glasgow College region; and
- Sectors – Early Years and Child Care and Financial and Professional Services.

Having a robust evidence base is crucial if we are to ensure a fit for purpose skills system. SDS and partners are working to develop evidence on the key strategic issues and challenges for Scotland. This and the evidence contained in the RSAs will help inform Step 1 of this model – the Demand Assessment.

Figure 3: Five-step Skills Alignment model

1. Demand Assessment
2. Provision Planning
3. Outcome Agreements/Commissioning
4. Performance Management/Monitoring
5. Review and Evaluation

Source: Skills Development Scotland
The Dumfries and Galloway Economy
The Dumfries and Galloway Economy

Current Economic Performance
Gross Value Added (GVA) is a measure of the value of goods and services produced in an area and is an indicator of the economy’s health.

GVA in Dumfries and Galloway in 2019 was £2.7bn, two per cent of Scotland’s output (£138.8bn).

This share of GVA ranks Dumfries and Galloway as one of the smallest contributing RSA regions to the Scottish economy.

In 2019, the highest value sectors in Dumfries and Galloway were:
- Manufacturing, £0.5bn;
- Real Estate Activities, £0.4bn;
- Human Health and Social Work, £0.3bn;
- Agriculture, Forestry and Fishing, £0.2bn; and
- Wholesale and Retail, £0.2bn.

Past Economic Performance
From 2009 to 2019 the Dumfries and Galloway economy, measured by GVA, grew by 1.5 per cent on average each year. This was a faster rate of growth than Scotland, which over the same period experienced 1.4 per cent growth on average each year.

Future Economic Performance
GVA in Dumfries and Galloway is forecast to grow by 1.2 per cent on average each year from 2019 to 2029. This rate of growth would be below that of Scotland (1.7 per cent) and the UK (2.0 per cent), and below the average annual growth rate that Dumfries and Galloway experienced from 2009 to 2019.

Economic growth across Scotland is expected to be relatively modest in the short term, as businesses show their reluctance to invest while operating under Brexit-related uncertainties. Slower GVA growth in Scotland is largely explained by its industrial mix, and specifically, the most dynamic sectors such as high value business services and digital sectors being underrepresented in Scotland compared to the UK.

In addition to Real Estate, sectors forecast to have the greatest increases in GVA output are:
- Manufacturing, £37m;
- Human Health and Social Work, £34m;
- Wholesale and Retail Trade, £30m; and
- Professional, Scientific and Technical Activities, £22.5m.

When compared to GVA output in 2019, it can be seen that the sectors that had the greatest GVA output in 2019 are expected to have the greatest actual growth from 2019 to 2029.

Percentage change provides an alternative viewpoint for considering the future GVA contribution from sectors. This approach captures sectors that might make smaller GVA contributions but are forecast to grow at a faster rate. Information and Communication is expected to have the greatest rate of GVA growth followed by Administrative and Support Service Activities from 2019 to 2029 in Dumfries and Galloway. These were among the smallest sectors in 2019 (in economic terms) but they are forecast to have an average annual growth rates of 2.2 per cent and 2.1 per cent respectively. While, the larger Professional, Scientific and Technical Activities sector is also expected to have a fast rate of growth from 2019 too, averaging 2.1 per cent each year up to 2029.

Fiscal policy is likely to remain tight over the forecast period and, as a result, will weigh on the economic growth prospects for the Public Sector. Public Administration and Defence Activities is expected to contract each year from 2019 to 2029 in Dumfries and Galloway. The forecast average annual rate of contraction is -1.1 per cent. Education is forecast to experience no growth over the same period. However, the Human Health and Social Work sector is forecast to have GVA growth, growing by 1.1 per cent per year over the forecast period (see Figure 4). This will be as a result of increased demand for these services due to changes in the region’s population structure.

**Figure 4**
Forecast average annual GVA change by Industry (%) (2019 - 2029), Dumfries and Galloway

Source: Oxford Economics
The key sectors contributing most to GVA growth in Dumfries and Galloway from 2019 to 2029 are expected to be Financial and Business Services, Health and Social Care and Food and Drink (see Figure 5). These sectors are expected to have a higher overall contribution to growth as they have a relatively large presence in the regional economy already.

**Figure 5**
Forecast absolute GVA growth by Key Sector (£m) (2019 - 2029), Dumfries and Galloway

- Financial and business services: £36.8
- Health and social care: £34.0
- Food and drink: £21.9
- Energy: £16.6
- Construction: £15.2
- Digital: £12.0
- Tourism: £10.1
- Engineering: £7.5
- Creative industries: £6.9
- Child-day care activities: £4.8
- Life sciences: £4.3
- Chemical sciences: £3.9

Source: Oxford Economics
Looking instead at percentage change for the key sectors for 2019 to 2029, Child-Day Care Activities is forecast to be the fastest growing. It is forecast to grow 3.4 per cent each year on average. This strong outlook reflects the Scottish Government’s childcare policy to double the number of hours of funded childcare by 2020. However, its small size in absolute terms means that its impact on overall growth is limited.

Relatively fast growth is also forecast in the Financial and Business Services, Digital, and Creative Industries sectors. However, like Child-Day Care Activities, the overall contribution of Digital and Creative Industries will be lower due to their smaller size relative to the currently much larger, dominant key sectors in the region (see Figure 6).

![Figure 6](image-url)

**Figure 6**
Forecast average annual GVA growth by Key Sector (%) (2019 - 2029), Dumfries and Galloway

- Child-day care activities: 3.4%
- Financial and business services: 2.2%
- Digital: 2.2%
- Creative industries: 1.8%
- Energy: 1.5%
- Tourism: 1.1%
- Health and social care: 1.1%
- Life sciences: 0.9%
- Engineering: 0.8%
- Chemical sciences: 0.7%
- Food and drink: 0.7%
- Construction: 0.6%

Source: Oxford Economics
Productivity

Productivity is the measure of goods and services produced per unit of labour input. Productivity has been calculated by dividing total regional GVA by total regional employment (measured by jobs).

The productivity of a region is influenced by the industrial mix that is present. Within the same industries productivity may differ from business to business.

Office for National Statistics (ONS) analysis tells us that:

GVA per worker [productivity] is generally lower in the accommodation and food service activities, administrative and support services activities, and wholesale and retail trade industries than in most other industries. The production sector, by contrast, has relatively high productivity.

Among the service sectors, the professional, scientific and technical activities, financial and insurance activities, and the information and communication sector also tend to have relatively high-productivity. Therefore, a relatively high aggregate productivity in a region may sometimes be a reflection of a relatively large share of more productive industries in that location.

In 2019, productivity in Dumfries and Galloway was £39,400. This was lower than the Scottish average of £50,400 (see Figure 7) and reflects the industrial mix in the region.

From 2009 to 2019, productivity in Dumfries and Galloway grew by 1.3 per cent on average each year.

This rate of growth was the same as what occurred across Scotland over the period. The equivalent for the UK was 0.8 per cent.

Productivity in Dumfries and Galloway is forecast to grow at an average of 1.3 per cent per year from 2019 to 2029. This is below the growth rate expected for Scotland as a whole (1.4 per cent), and below that of the UK (1.5 per cent).

Source: Oxford Economics
Employment in Dumfries and Galloway
Employment in Dumfries and Galloway

Current Employment

Total employment in Dumfries and Galloway (measured by jobs) was estimated to be 69,900 in 2019, three per cent of Scottish employment.

The employment rate for the working age population (aged 16-64) in Dumfries and Galloway was 72.6 per cent, which was below the rate for Scotland (74.5 per cent). Compared to Scotland, the region had below average employment rates for:

- Young people (aged 16-24), 55.3 per cent compared to 58.3 per cent;
- Males, 75.0 per cent compared to 78.1 per cent;
- Females, 70.4 per cent compared to 71.1 per cent;
- Ethnic minorities, 40.9 per cent compared to 57.4 per cent.

The employment rate for disabled people was higher in Dumfries and Galloway compared to Scotland, 47.4 per cent compared to 45.9 per cent.

The region’s overall employment rate means that approximately just over one in four of Dumfries and Galloway’s working age population were unemployed (2.7 per cent) or economically inactive (25.3 per cent). Inactivity includes people who are studying, retired or looking after their family or home.

Across Scotland and within the region full-time jobs were most numerous, 47,800 jobs (69 per cent) were full-time in Dumfries and Galloway in 2019. This was a higher percentage share compared to Scotland where 68 per cent of jobs were full-time.

Within the region more than two thirds of full-time jobs (32,100; 67 per cent) were held by males, and the remaining one third (15,700; 33 per cent) were held by females.

Part-time jobs accounted for a smaller percentage share of employment in the region compared to Scotland, 31 per cent compared to 32 per cent. Overall there were 21,800 part-time jobs in Dumfries and Galloway, females accounted for almost three quarters (16,100; 74 per cent). Whilst males accounted for 26 per cent, 5,700 jobs

Figure 8

Employment by gender and full-time/part-time (2019), Dumfries and Galloway

Source: Oxford Economics

21 Equalities Act (EA) Core Disabled
22 Employment rate figures from Annual Population Survey, April 2018 – March 2019
23 Employment rate, unemployment rate and economic inactivity rate may not sum to 100 due to rounding.
In Dumfries and Galloway, the largest employing sectors, and their regional share of employment, in 2019 were (see Figure 9):

- Human Health and Social Work, 16 per cent;
- Wholesale and Retail Trade, 16 per cent;
- Manufacturing; ten per cent;
- Education, eight per cent;
- Agriculture, Forestry and Fishing, eight per cent; and
- Accommodation and Food Services, eight per cent.

Real Estate Activities, the sector that made the second greatest GVA contribution in 2019 and is forecast to have the greatest growth (irrespective of the imputed rent consideration) accounted for a small share of regional employment. The sector accounted for 1,100 jobs, a two per cent share.

**Figure 9**

**Employment by Industry and share of total employment (2019), Dumfries and Galloway**

Source: Oxford Economics
Large sectors are an important source of jobs, however regions also have sectoral strengths that make them unique. It means that smaller sectors can be more important than their size suggests as they are more concentrated in the region compared to the national average. In Dumfries and Galloway, Agriculture, Forestry and Fishing was the greatest specialism with the percentage of employment in this sector more than four times greater than the Scottish average. Other sectors that had above average concentrations in Dumfries and Galloway were Water Supply, Sewerage and Waste Management (1.5 times more concentrated), Manufacturing (1.4 times more concentrated) and Real Estate Activities (1.2 times more concentrated).

Of the key sectors, Health and Social Care, as might be expected given the sectoral insight above, was the largest in Dumfries and Galloway in 2019. The sector accounted for 11,300 jobs. Food and Drink was the second largest with a total of 8,100 jobs (see Figure 10).

**Figure 10**

Employment by Key Sector and share of total employment (2019), Dumfries and Galloway

<table>
<thead>
<tr>
<th>Sector</th>
<th>Employment</th>
<th>Share of Total Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health and social care</td>
<td>11,300</td>
<td>16%</td>
</tr>
<tr>
<td>Food and drink</td>
<td>8,100</td>
<td>12%</td>
</tr>
<tr>
<td>Tourism</td>
<td>6,200</td>
<td>9%</td>
</tr>
<tr>
<td>Construction</td>
<td>5,600</td>
<td>8%</td>
</tr>
<tr>
<td>Financial and business services</td>
<td>3,300</td>
<td>5%</td>
</tr>
<tr>
<td>Engineering</td>
<td>2,200</td>
<td>3%</td>
</tr>
<tr>
<td>Creative industries</td>
<td>1,100</td>
<td>2%</td>
</tr>
<tr>
<td>Energy</td>
<td>800</td>
<td>1%</td>
</tr>
<tr>
<td>Digital</td>
<td>500</td>
<td>1%</td>
</tr>
<tr>
<td>Child-day care activities</td>
<td>500</td>
<td>1%</td>
</tr>
<tr>
<td>Life sciences</td>
<td>200</td>
<td>0%</td>
</tr>
<tr>
<td>Chemical sciences</td>
<td>100</td>
<td>0%</td>
</tr>
</tbody>
</table>

Source: Oxford Economics
Sectors tell us about the industries that people work in, and occupations provide insight on the type of jobs people do. In 2019, one-third of all occupations (33 per cent) in Dumfries and Galloway were ‘higher level’, 37 per cent were ‘mid-level’ and 31 per cent were ‘lower level’. Compared to Scotland, the occupational structure of Dumfries and Galloway had a greater percentage of the workforce in ‘mid-level’ and ‘lower-level’ occupations and fewer in ‘high-level’. Scotland had a greater percentage in ‘higher level’ (45 per cent) occupations but fewer in ‘mid-level’ (25 per cent) and ‘lower-level’ (30 per cent) occupations.

A detailed look at the occupational structure shows that the largest occupations in the region in 2019 were (see Figure 11):

- Caring Personal Service Occupations, ten per cent;
- Clerical and Services Elementary Occupations, nine per cent;
- Sales Occupations, eight per cent;
- Administrative Occupations, seven per cent;
- Corporate Managers, six per cent; and
- Transport and Mobile Machine Drivers and Operatives; six per cent.

Figure 11
Employment by occupation and share of total employment (2019), Dumfries and Galloway

Source: Oxford Economics
**Past Employment**

Employment in Dumfries and Galloway increased by 2.1 per cent from 2009 to 2019. This was largely caused by growth in prominent, large employing sectors including:

- Administrative and Support Service Activities; 1,500 jobs;
- Professional, Scientific and Technical Activities, 800 jobs; and
- Real Estates; 400 jobs.

Whilst these sectors experienced job growth, other sectors contracted. The greatest absolute decline occurred in the Agriculture, Forestry and Fishing sector in Dumfries and Galloway. Compared to 2009, there were 800 fewer jobs in the sector in 2019. Decline also occurred in Wholesale and Retail Trade (-500 jobs) and Public Administration and Defence (-500 jobs).

Beyond the sectors, other shifts in the region’s labour market have occurred. Both full-time and part-time employment increased by 1,300 jobs and 100 jobs respectively from 2009 to 2019. Male employment also increased by 3,200 jobs whilst female employment decreased by 1,700 jobs.

**Employment Forecast**

The employment growth that has occurred in Dumfries and Galloway in the past is not forecast to continue. From 2019 to 2029 employment decline of -1.4 per cent is forecast in the region. This equates to -0.1 per cent employment decrease year to year and 900 jobs fewer in total over the forecast period. This contrasts with forecasted growth across Scotland. A three per cent increase in employment, or 0.3 per cent growth annually, over the forecast period is expected for Scotland. The growth rate for the UK is greater still, a five per cent increase, or 0.5 per cent annual change, is forecast.

Over the period to 2029, full-time employment is expected to decrease in Dumfries and Galloway with 500 fewer full-time jobs in 2029 compared to 2019\(^\text{24}\). Both male and female full-time employment will decrease, by 400 and 200 jobs respectively. Part-time employment is also expected to decline by 400 jobs. Female part-time employment is forecast to decline by 600 jobs, but some of this decline is expected to be offset by growth of 100 jobs in male part-time employment (see **Figure 12**).

**Figure 12**

**Forecast employment change, by gender and full-time/part-time (2019 - 2029), Dumfries and Galloway**

![Diagram showing forecast employment change](source: Oxford Economics)

\(^{24}\) Figures are rounded to the nearest 100 and as a result totals may not equal the sum of the constituent parts.
Although employment is forecast to decrease in Dumfries and Galloway from 2019 to 2029, sectors will have varying performance. The greatest growth in jobs is forecast in Administrative and Support Service Activities, Professional, Scientific and Technical Activities and Construction. Each sector is forecast to have 300 jobs more by 2029 compared to 2019. Arts, Entertainment and Recreation is also expected to have growth of 100 jobs over the period.

Job losses in Dumfries and Galloway are also forecast in some sectors, notably in production sectors and the public sector. Manufacturing is the sector forecast to have the greatest number of job losses from 2019 to 2029. During the forecast period a decline of 1,100 jobs is anticipated. This reflects the general trend of more capital intensive and higher value-added activity in the sector, which requires less labour-intensive methods (see Figure 13).

![Figure 13](source: Oxford Economics)
Employment is also forecast to fall overall in Dumfries and Galloway’s public services sector\textsuperscript{25} with Public Administration and Defence forecast to contract by 400 jobs over the forecast period due to continued pressure on public finances. The Education and Human Health and Social Care sectors are also expected to contract but by a lesser amount, 100 jobs each.

The growth and contraction of employment by sector means that private services\textsuperscript{26} are expected to account for a larger share of jobs in Dumfries and Galloway over the forecast period. The percentage is forecast to rise from 46 per cent in 2019 to 47 per cent in 2029. In 2019 the Construction sector and primary industries accounted for six per cent and ten per cent of employment respectively and these shares are expected to be maintained in 2029. The share that the public services and Manufacturing sectors each account for is expected to decline over the forecast period from 29 per cent and ten per cent to 28 per cent and eight per cent in 2029 respectively.

Looking ahead, the outlook for the key sectors largely echoes the broad sector trends summarised above – with Financial and Business Services and Construction forecast to have the greatest growth of 200 jobs each. Tourism and Child-Day Care Activities are both forecast to grow by 100 jobs each from 2019 to 2029 in Dumfries and Galloway.

Food and Drink is the key sector forecast to have the greatest employment decline in Dumfries and Galloway, with 400 fewer jobs in 2029 compared to 2019 expected (see Figure 14).

\begin{figure}[h]
\centering
\includegraphics[width=\textwidth]{figure14.png}
\caption{Forecast employment change by Key Sector (2019 - 2029), Dumfries and Galloway}
\end{figure}

\textsuperscript{25} Comprising Public administration and defence, Education, and Human health and social work.

\textsuperscript{26} N.B. ‘private services’ comprise the following sectors: wholesale and retail trade; transportation and storage; accommodation and food services; information and communication; financial and insurance activities; real estate activities; profess., scientific and technical activities; administrative and support services; arts, entertainment and recreation, and other service activities.

Source: Oxford Economics
By occupation, Skilled Construction and Building Trades Occupations, Culture, Media and Sports Occupations and Business and Public Service Occupations are forecast to experience the greatest increase in employment in Dumfries and Galloway from 2019 to 2029 (of 100 workers each). Growth in these occupations is closely related to the forecast rise in employment in the Construction, Financial and Business Services and Arts, Entertainment and Recreation sector.

Occupations likely to contract over the next decade tend to be those most closely associated with Manufacturing and Public Administration and Defence, reflecting the declining numbers of jobs in each of these sectors. Examples include Skilled Metal and Electrical Trades (-300 people) and Administrative Occupations (-300 people) (see Figure 15).

Figure 15
Forecast employment change by occupation (2019 - 2029), Dumfries and Galloway

Source: Oxford Economics
Total Labour Market Requirement in Dumfries and Galloway
Total Labour Market Requirement in Dumfries and Galloway

Total Requirement

In the previous sections we presented what has happened, is happening and what is forecast to happen in Dumfries and Galloway economy and labour market. When looking at the labour market, we have until this section focused on how many jobs there will be in any given year and how that compares to another year. However, the labour market is more complex than this.

In this section, we provide greater insight on job openings. To do this we consider the jobs that will be created or lost due to expansion or contraction in the labour market and the jobs that will arise due to people leaving the labour market. People leave the labour market and jobs become vacant for a variety of reasons, retirement being the most common cause. This is called the replacement requirement.

In Dumfries and Galloway, 20,800 job openings are forecast from 2019 to 2029. These will arise completely due to the replacement requirement, which will create 21,700 openings. As shown in the previous chapter the number of jobs in Dumfries and Galloway is forecast to decline -900 from 2019 to 2029.

These opportunities are expected to be concentrated in a small number of sectors, with four sectors in Dumfries and Galloway forecast to account for almost two thirds (62 per cent) of the requirement. These are (see Figure 16):

- Wholesale and Retail Trade, 4,700 jobs;
- Agriculture, Forestry and Fishing, 3,800 jobs;
- Accommodation and Food Services, 2,300 jobs; and
- Human Health and Social Work Activities, 2,000 jobs.

These sectors were the largest in the region in 2019.

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27 Unmet job openings are those that are expected to arise once some natural change and movement in the labour market has been accounted for. All forecast figures could be higher or lower in reality.
Figure 16
Forecast net requirement by Industry (2019 - 2029), Dumfries and Galloway

Source: Oxford Economics

Please note that due to rounding, data in Figure 16 may differ to the narrative on page 26.
To fill these jobs, and others, there is a forecast requirement for 19,900 people in the region from 2019 to 2029. The difference between the people and job requirements is due to some people having more than one job, for example someone who has two part-time jobs. The number of people working in Dumfries and Galloway is expected to decline by 1,000 over the forecast period. The replacement requirement of 20,900 people however creates a need for labour.

By occupation, the greatest number of people are forecast to be required in (see Figure 17):

- Sales Occupations, 2,900 people;
- Clerical and Service Elementary Occupations, 2,700 people;
- Trades, Plant and Storage Elementary Occupations, 2,600 people;
- Teaching and Research Professionals, 2,100 people; and
- Skilled Agricultural Trades, 1,600 people.

**Figure 17**  
Forecast net requirement by occupation (2019 - 2029), Dumfries and Galloway

Source: Oxford Economics
Supply of People in Dumfries and Galloway
Supply of People in Dumfries and Galloway

Projection of Total Population

NRS produce population estimates for Scotland biennially. Their 2016 based forecasts cover the period up to 2041, so in this chapter we present a longer forecast period than the previous chapters.

In 2016, the population of Dumfries and Galloway was 149,500, three per cent of Scotland’s population.

By age, the largest group in Dumfries and Galloway were people of working age (16-64 years). There were 89,000 people in this age group, 60 per cent of the region’s population. Whilst it was the largest group, people of working age across Scotland accounted for a larger share of the population overall (65 per cent).

The number of people of working age compared to those of non-working age has implications for the region’s dependency ratio. The dependency ratio is important when considering the demand for public services, for example schools and healthcare services, and the funds available to provide these services, the income from taxes and National Insurance. In 2016, the dependency ratio in Dumfries and Galloway was 68 per cent. This means that for every 100 people of working age, there were 68 people of non-working age. Across Scotland it was 55 per cent.

Of those who were in age groups thought to be dependent, the oldest age group was the largest. There were 36,900 people aged 65 or older who accounted for 25 per cent of the region’s population. Across Scotland those aged 65 or older accounted for 18 per cent of the population, which suggests an overall older population Dumfries and Galloway. The region accounts for four per cent of Scotland’s population aged 65 or over compared to three per cent for all ages.

Children and young people (0-15 years) accounted for the remaining 16 per cent, there were 23,600 individuals in this age group (see Figure 18).

Figure 18
Population by age (2016), Dumfries and Galloway and Scotland

Source: National Records of Scotland
Brexit has placed an increased focus on the nationality of people living and working in the UK. It has the potential to discourage EU migrants from coming to the UK to live and work, either through choice or eligibility. Migration is important to Scotland as without it the population would be declining. In Dumfries and Galloway, there were 4,000 people who were born in the EU and a further 3,000 from the rest of the world in 2018. The EU born population accounted for three per cent of the region’s population, and two per cent of the region’s population were born elsewhere in the world. Compared to Scotland a smaller percentage of the region’s population were born in the EU or elsewhere in the world. Across Scotland four per cent of the population were born in the EU, and four per cent were born in other countries outside of the EU.

From 2016 to 2041, the population of Dumfries and Galloway is projected to decline by approximately 7,700 people. Equating to a five per cent decrease, this contrasts with the projected growth rate for Scotland of five per cent over the same period.

The age structure of the region’s population is projected to change over the coming decades, with the percentage of the population who are of working age expected to fall from 60 per cent in 2016 to 51 per cent in 2041; a projected decrease of 16,000 people.

The largest increases are expected in the 65 or older age groups, with a 68 per cent increase projected for those aged 75+ (an additional 11,200 people). There is a forecast decline in all other age groups over the period, with the most substantial decline of 18 per cent projected for those aged 30-64, a projected fall of 12,200 people.

These shifts suggest that the region could have a smaller and generally older population by 2041. This has implications for the region’s dependency ratio. Brexit may also affect the population structure and exacerbate any challenges. By 2041, the region’s dependency ratio is expected to increase to 94 per cent. Across Scotland the dependency ratio is expected to rise to 70 per cent (see Figure 19).

Figure 19
Dependency ratio (2016 and 2041)

Source: National Records of Scotland
Skills Shortages, Gaps and Challenges in Dumfries and Galloway
**Skills Shortages, Gaps and Challenges in Dumfries and Galloway**

The Employer Skills Survey (ESS) gathered information on the skills challenges that employers encountered when recruiting, and any challenges that they had within their existing workforces. It is the primary source for this insight as it has taken a consistent approach across sectors and regions. The survey covered:

- Recruitment and skill-shortage vacancies;
- Skills gaps in the existing workforce;
- Skills under-utilisation;
- Upskilling - the need for staff to acquire new skills or knowledge;
- Training and workforce development; and
- High Performance Working practices.

The insight presented here is from the 2017 ESS which covered Scotland, England, Wales and Northern Ireland. The next ESS will be published in 2020 and unlike previous years, Scotland’s results will be published by the Scottish Government. Future ESS results for England, Wales and Northern Ireland will still be available and will be published by the UK Government.

**Skills Shortages**

Skills shortages are challenges that arise when employers are recruiting but are unable to find applicants with the required skills. When a vacancy cannot be filled due to a shortage of skills it is a skill-shortage vacancy (SSV). SSVs impact on the workplace and workforce in a number of ways, including:

- Increasing the workload for other staff;
- Creating difficulties when trying to meet customer service objectives; and
- Increasing operating costs.

In 2018, skills shortages were estimated to have cost Scottish employers £361.3 million, roughly £17,000 per organisation.

To understand the scale of the challenge that they present we can consider their incidence (how many employers are experiencing the challenge) and their density (how many vacancies are affected).

In 2017, the number of employers reporting at least one SSV in Dumfries and Galloway was six per cent, the same percentage as across Scotland. The incidence of SSVs in the region was lower in 2015 (four per cent), whereas across Scotland the incidence of SSVs has remained the same (six per cent) from 2015 to 2017.

Density, which indicates how many vacancies were SSVs, was higher in Dumfries and Galloway than Scotland in 2017 and 2015. In 2017, density in the region was 32 per cent, down from 39 per cent in 2015. Across Scotland, density was 24 per cent in 2015 and 2017. This suggests that employers in the region are facing difficulties across a number of roles, and SSVs are more widespread in the region than across Scotland (see Figure 20).
Across Scotland, to overcome SSVs, the most common responses employers took were to:
• Increase their expenditure on advertising and recruitment;
• Use new recruitment methods; and
• Redefine existing jobs.

Skills are not the only reason employers can find it difficult to fill vacancies. Other factors like hours and location, particularly so in a rural region like Dumfries and Galloway, can make it hard to fill vacancies. In Scotland, 41 per cent of employers tried to recruit non-UK nationals to overcome hard to fill vacancies. Of these employers, 89 per cent sought to recruit EU nationals as a response to recruitment challenges, equivalent data for Dumfries and Galloway is not available. Any changes to migration policy as a result of Brexit will affect all regions in Scotland.

Most employers took action to overcome SSVs, however 11 per cent of Scottish employers in 2017 took no action.
Skills Gaps
Skills gaps arise when existing employees are not fully proficient as they do not have all the skills necessary for their role – these can be people, personal, practical and/or technical skills. Similar to skills shortages, we consider the incidence (how many employers have at least one person not fully proficient) and density (how many employees are not fully proficient). Skills gaps have similar impacts to SSVs and can slow down innovation in the workplace. Across Scotland, the most common causes of skills gaps were:
- Employees being new to their role, or training being incomplete;
- A lack of staff motivation; and
- An inability to recruit staff with the required skills, creating a need to upskill employees/recruits.

In 2017, the number of employers who reported a skills gap in at least one employee was 14 per cent in Dumfries and Galloway, compared to 16 per cent for Scotland. Of the 13 regions, Dumfries and Galloway had one of the lowest incidences of skills gaps. Since 2015, the incidence of skills gaps in the region has increased. In 2015, 13 per cent of employers experienced a skills gap, the same percentage as across Scotland.

Overall, 5.0 per cent of the workforce in Dumfries and Galloway had a skills gap in 2017 which was the same across Scotland. This was an increase from 4.4 per cent and 4.9 per cent in 2015 for the region and Scotland respectively. This, alongside the insight on incidence, suggests that whilst skills gaps are not as far reaching in Dumfries and Galloway, the scale of skills gaps in the workforce in the region is similar to Scotland (see Figure 21).

Across Scotland employers responded to skills gaps by:
- Increasing their expenditure on training, expanding trainee programmes and/or increasing training activity;
- Implementing more staff supervision; and
- Implementing a mentoring or buddy scheme.

### Figure 21
**Skills Gaps (2015 and 2017), Dumfries and Galloway**

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage of employers with a Skills Gap</th>
<th>Percentage of the workforce with a Skills Gap</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>13%</td>
<td>4.4%</td>
</tr>
<tr>
<td>2017</td>
<td>14%</td>
<td>5.0%</td>
</tr>
</tbody>
</table>

Source: Employer Skills Survey
Most employers in Dumfries and Galloway acted to overcome skills gaps, and 12 per cent sought to recruit non-UK nationals as a response, compared to 15 per cent across Scotland. Across Scotland, most employers (93 per cent) who sought to recruit non-UK nationals considered EU nationals, equivalent data for Dumfries and Galloway is not available.

Most employers took action to overcome SSVs, however 15 per cent of Scottish employers took no action in 2017.

**Skills Under-Utilisation**

Employees are under-utilised if they have skills and qualifications more advanced than what is needed for their role. Addressing skills under-utilisation is important. In 2012 the economic cost to the UK of skills under-utilisation was estimated to be between £12-25bn. If skills-utilisation was on a par with the levels observed in Germany or France, UK GDP would be £5-9bn higher. There are implications for individuals too, having their skills under-utilised can impact on their income, health and wellbeing.

Similar to SSVs and skills gaps we can understand the incidence (how many employers have under-utilised employees) and density of the challenge (how many employees are under-utilised).

The number of employers reporting skills under-utilisation in their workforce was greater in Dumfries and Galloway in 2017 compared to Scotland, 43 per cent and 35 per cent respectively. This suggests that almost half of employers in the region had skills and talent going unused. The percentage of employers reporting skills mismatch has risen and skills under-utilisation increased in the region and across Scotland from 2015 to 2017, from 20 per cent and 32 per cent respectively.

The proportion of staff under-utilised has increased in the region, from 5.3 per cent in 2015 to 12.2 per cent in 2017. This suggests that more employers in the region are experiencing skills under-utilisation and the number of their employees under-utilised has increased. Across Scotland, the percentage of staff under-utilised increased from 7.9 per cent to 9.2 per cent which suggests a skills challenge that is growing in the region and across Scotland (see Figure 22).

![Figure 22](image-url)

**Skills Under-Utilisation (2015 and 2017), Dumfries and Galloway**


Upskilling
Skills are gained throughout life, and a need to upskill can arise due to:
• New legislative or regulatory requirements;
• The introduction of new technologies, equipment or working practices;
• Increased competitive pressure;
• The development of new products and services; and more recently
• The UK’s decision to leave the EU.

A need to upskill employees in the next 12 months was anticipated by 56 per cent of employers in Dumfries and Galloway (as of 2017). This was smaller than the percentage of employers across Scotland who anticipated a need to upskill (69 per cent). In the region, more than two thirds of the employers who identified development needs mentioned a requirement for operational skills (68 per cent). The need to upskill operational skills was higher in the region compared to Scotland (57 per cent). Fewer employers in the region expected a need to upskill the complex analytical and digital skills of their employees (31 per cent and 38 percent respectively) compared to employers across Scotland (44 per cent and 49 per cent respectively). The evidence suggests that fewer employers in Dumfries and Galloway expect to upskill their workforce in the next twelve months, of those that expect to the greatest requirement is for operational skills (see Figure 23).

Figure 23
Employers anticipating a need to upskill by type of skill (2017), Dumfries and Galloway and Scotland

<table>
<thead>
<tr>
<th>Skill Type</th>
<th>Dumfries and Galloway</th>
<th>Scotland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complex analytical</td>
<td>31%</td>
<td>44%</td>
</tr>
<tr>
<td>Operational skills</td>
<td>68%</td>
<td>57%</td>
</tr>
<tr>
<td>Digital skills</td>
<td>38%</td>
<td>49%</td>
</tr>
</tbody>
</table>

Source: Employer Skills Survey
Conclusion
Conclusion

In 2019 Dumfries and Galloway made a GVA contribution to the Scottish economy of £2.7bn, two per cent of Scotland’s output (£138.8bn). Looking ahead, the economy is forecast to grow by 1.2 per cent on average each year up to 2029. This rate of growth would be slower than what is forecast across Scotland and it would be below the average annual growth rate that Dumfries and Galloway experienced from 2009 to 2019. The forecast however reflects a point in time and the high levels of economic uncertainty could change the outlook.

Total employment in Dumfries and Galloway (measured by jobs) was estimated to be 69,900 in 2019, three per cent of Scottish employment. Employment in the region increased from 2009 to 2019, but the forecast suggests that decline will occur in the future from 2019 to 2029. Although employment is forecast to decrease, sectors will have varying performance. The greatest growth in jobs is forecast in:
• Administration and Support Services, 300 jobs;
• Professional, Scientific and Technical Activities, 300 jobs;
• Construction, 300 jobs; and
• Arts, Entertainment and Recreation, 100 jobs.

As the region’s share of Scotland’s GVA was lower in 2019 than its share of employment, productivity performance was below average. Productivity was £39,400 in Dumfries and Galloway compared to £50,400 across Scotland.

The employment decline forecast will mean there will be 900 fewer jobs in the region by 2029. However, the need to replace workers leaving the labour market will create 21,700 opportunities. Vacancies arising due to the replacement requirement create a need despite the overall reduction in the number of jobs.

To fill these jobs, and others, there is a forecast requirement for 19,900 people in the region from 2019 to 2029. The difference between the people and job requirements is due to some people having more than one job, for example someone who has two part-time jobs.

By occupation, the greatest number of people are forecast to be required in:
• Sales Occupations, 2,900 people;
• Clerical and Service Elementary Occupations, 2,700 people;
• Trades, Plant and Storage Elementary Occupations, 2,600 people;
• Teaching and Research Professions, 2,100 people; and
• Skilled Agricultural Trades, 1,600 people.

While there will be demand for people to fill jobs, the population projection suggests that Dumfries and Galloway could have a smaller and generally older population by 2041. This presents a number of challenges:
• Skills challenges could be exacerbated by a deficit of talent, created due to the growth of people reaching retirement age and the decline of the number of people of working age;
• Pressures on public finances and services could increase due to a growing dependency ratio, the region’s dependency ratio is expected to reach 94 per cent by 2041, up from 68 per cent in 2016; and
• Migration has been a driver of population growth across Scotland and an important source of skilled labour. With de-population forecast in the region and five per cent of the region’s population born outside of the UK, changes to migration policy arising from Brexit could adversely affect future migration to the region and also impact on those who have already settled.

To address the current and future challenges in the labour market, and to make the most of the region’s strengths SDS is working in partnership with others on a range of actions.
The Scottish Government confirmed in Phase 2 of the Enterprise and Skills Review, that a new South of Scotland Enterprise (SOSE) agency be established to address the economic challenges of the area and driving inclusive growth. This new statutory body will begin its formal legislative operation from 1st April 2020 and will operate across the local authority areas of Dumfries and Galloway and Borders.

In the interim the South of Scotland Economic Partnership (SOSEP) has been established to respond to the economic needs and opportunities of the South of Scotland in advance of the establishment of the new agency and an operating plan has been developed. SOSEP is laying the foundations for the new agency and ensuring that the area benefits from a new approach to economic development with a clearly prioritized work plan. SOSEP brings together the private, third, further and higher education sectors, as well as the seven key public-sector organizations supporting economic development in the South of Scotland which includes SDS.

Seven theme groups have been established under SOSEP including an Education and Skills theme group chaired by a member of the SOSEP Board.

SOSEP has a three-fold focus to:

- develop and deliver a clear and prioritized work programme, aligning existing activity and piloting new approaches to benefit the South of Scotland;
- influence the design of the new South of Scotland Enterprise agency; and
- deliver a strong programme of engagement with stakeholders across the South of Scotland to inform the proposals for the new agency.

Also present in the region is the Crichton Campus Leadership Group (CCLG) which seeks to make a transformational impact on the prospects of Dumfries and Galloway, its economy, its people and its communities. It works to facilitate a shared understanding of the education, skills and training needs of the region through the effective engagement of key stakeholders. These include academic partners (The University of Glasgow, the University of the West of Scotland, The Open University, Glasgow School of Art, Scotland’s Rural College and Dumfries and Galloway College), The Crichton Trust, Crichton Foundation, Crichton Carbon Centre, Dumfries and Galloway Council, NHS Dumfries and Galloway, the National Centre for Resilience, Scottish Enterprise, SDS, and independent members. The CCLG is supported by SFC and has an important role in raising the profile and maximising the impact of collaborative activity on the Crichton Campus across Dumfries and Galloway and beyond.

http://www.sosep.co.uk/sosep_files/SoSEP_OperatingPlan_JUN19_FINALNEW.PDF
The Dumfries and Galloway Regional Economic Strategy 2016-2021 sets out the economic ambition for the region, to ensure that every member of every community has equality of access to a prosperous future32. The Dumfries and Galloway Economic Leadership Group was set up to support the implementation of the Regional Economic Strategy. Membership is drawn from the private sector, public and third sectors including representatives of key sectors for the region (food and drink, agriculture, timber-forestry, fisheries, engineering, construction, energy and tourism), local authority and national agencies and Dumfries and Galloway College.

SDS has worked closely with the SOSEP Education and Skills group to jointly develop a new Regional Skills Investment Plan33 (RSIP) for the South of Scotland, covering the local authority areas of Dumfries and Galloway and Borders. This new RSIP has a series of actions which will:

- improve access to education, skills and training;
- better meet the needs of all employers;
- grow and develop the workforce;
- focus on a region for young people;
- create a culture of enterprise and innovation;
- and
- future proof the skills system.

Building on existing partnership activity, there is now an increased focus across the region to address economic, productivity and skills challenges and realise new opportunities. The establishment of SOSEP (and the SoSE) has the potential to deliver transformational change in the region. There is also a Borderlands proposition which will benefit the South of Scotland and the four neighboring English counties. In the light of these developments, the forecast picture may change as new approaches and investment become more targeted and embedded.

However, a clear focus on the evidence base and a continued commitment to collaborative working will ensure that the benefits for the employers, individuals and communities of Dumfries and Galloway flowing from these developments are maximised both now and in the future.

Contact Us: If you have any feedback or comments on this report, please email rsa@sds.co.uk

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32 Dumfries and Galloway Regional Economic Strategy 2016-2020
33 http://www.skillsdevelopmentscotland.co.uk/media/43740/south-of-scotland-sip.pdf