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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 the use of published data sets. 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. The section on the Supply of People in the region is an exception to this rule. Whilst 2018 estimates exist, we have used data for 2016 for consistency with the 2016 based population projections which are the latest available.

RSAs also 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 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 and SOC 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.

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 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 Tayside which covers the Angus, Dundee City and Perth and Kinross local authorities.

1 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/
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 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.

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8 Scottish Government (February 2019) International Comparators of Productivity – Economy Indicator 2017
9 National Records of Scotland (April 2019) Mid-2018 population estimates Scotland
10 All population projections in this RSA are based on 2016. 2018 based projections for Scotland are available from the NRS website. We have used 2016 to maintain consistency with what is available at sub-Scotland level.
11 Dependency ratio is calculated by (a) the number of children aged 0-15 years, plus (b) the number of people of pension age and above – and comparing this total vis-à-vis the working age population.
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\(^\text{12}\).
- 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 10.8 per cent for males aged 16-24\(^\text{13}\).
- 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\(^\text{14}\).

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\(^\text{15}\).
- 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\(^\text{16}\).
- 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\(^\text{17}\).

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

Our growth needs to be inclusive

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\(^{13}\) Annual Population Survey (April 2018-March 2019)

\(^{14}\) Annual Population Survey (April 2018-March 2019), EA core disabled has been used for the employment rate of disabled people.


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**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”\(^\text{18}\) and this is at the core of the recently published Programme for Government.
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

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**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](image)

**Scotland’s Economy**
Boosting productivity is vital for our long-term prosperity

**Scotland’s People**
A tight labour market
Our growth needs to be inclusive

**Scotland’s Climate Change Emergency**
Our growth needs to be sustainable

**Scotland’s Resilience**
We need skills for resilience to thrive in a complex and ever-changing world

**Scotland’s Skills Issues**
- We need innovative workplaces and skills to boost productivity with employers and employees as active participants in the skills system
- 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
- We need to develop fit for purpose skills to enable Scotland to achieve its ambitious target for greenhouse gas emissions
- We need to develop sector specific skills for the economy and skills for resilience – ‘meta skills’

**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
Tayside’s Economy
**Tayside’s 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 Tayside in 2019 was £10.5bn, eight per cent of Scotland’s output (£138.8bn).

This share of GVA ranks Tayside as the sixth largest contributing RSA region to the Scottish economy.

In 2019, the highest value sectors in Tayside were:
- Real Estate Activities, £1.3bn;
- Wholesale and Retail, £1.2bn;
- Human Health and Social Work, £1.1bn;
- Manufacturing, also £1.1bn; and
- Education, £0.8bn.

**Past Economic Performance**
From 2009 to 2019 Tayside’s economy, measured by GVA, grew by 2.0 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 Tayside is forecast to grow by 1.5 per cent on average each year from 2019 to 2029. This rate of growth would be below that forecast for Scotland (1.7 per cent) and the UK (2.0 per cent).

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.

GVA growth in Tayside is expected to be driven by the dominant Real Estate sector from 2019 to 2029, the GVA produced by the sector is expected to increase by £298.6m. The GVA output from the Real Estate sector is however inflated by owner-occupier imputed rent. Imputed rent captures, economically, the value of the service homeowners are providing to themselves by owning and living in their own home. In addition to Real Estate, sectors forecast to have the greatest increases in GVA output are:
- Wholesale and Retail Trade, £181.8m;
- Human Health and Social Work, £169.7m;
- Electricity, Gas and Steam, £144.8m;
- Administration and Support Service Activities, £115.2m; and
- Professional, Scientific and Technical Activities, £112.7m.

When compared to GVA output in 2019, it can be seen that the three 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. In Tayside, Professional, Scientific and Technical Activities is expected to have the greatest rate of GVA growth from 2019 to 2029 (2.6 per cent). The Administrative and Support Services and Information and Communication sectors are also expected to have fast rates of growth from 2019, averaging 2.4 per cent each year up to 2029.

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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 leading to subdued growth in Tayside. Public Administration and Defence Activities are expected to grow by 0.1 per cent each year from 2019 to 2029 in the region. Education and Human Health and Social Work are also forecast to have GVA growth, growing by 0.2 per cent and 1.4 per cent each year over the forecast period respectfully (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), Tayside

Source: Oxford Economics
The key sectors contributing most to GVA growth in Tayside from 2019 to 2029 are expected to be Energy, Health and Social Care and Financial and Business Services (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.

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

Figure 6
Forecast average annual GVA growth by Key Sector (%) (2019 - 2029), Tayside

- Child-day care activities: 4.0%
- Digital: 2.4%
- Financial and business services: 2.1%
- Creative industries: 2.0%
- Energy: 1.7%
- Life sciences: 1.5%
- Health and social care: 1.4%
- Engineering: 1.4%
- Tourism: 1.4%
- Construction: 1.2%
- Food and drink: 0.8%
- Chemical sciences: 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 Tayside was £53,900. This was higher than the Scottish average of £50,400 (see Figure 7) and reflects the industrial mix in the region.

From 2009 to 2019, productivity in Tayside grew by 2.3 per cent on average each year. This rate of growth was faster than what occurred across Scotland. Average annual productivity growth across Scotland was 1.3 per cent over the period. The equivalent for the UK was 0.8 per cent.

Productivity in Tayside 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).

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ONS (2019) Understanding spatial labour productivity in the UK

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Figure 7
Productivity (2019)
Employment in Tayside
Employment in Tayside

Current Employment

Total employment in Tayside (measured by jobs) was estimated to be 194,900 in 2019, seven per cent of Scottish employment.

The employment rate for the working age population (aged 16-64) in Tayside was 74.4 per cent, which was marginally below the rate for Scotland (74.5 per cent). Compared to Scotland, the region had above average employment rates for:
- Young people (aged 16-24), 60.2 per cent compared to 58.3 per cent;
- Females, 72.4 per cent compared to 71.1 per cent;
- Disabled people, 48.3 per cent compared to 45.9 per cent; and
- Ethnic minorities, 67.0 per cent compared to 57.4 per cent.

The employment rate for males was lower in Tayside compared to Scotland, 76.5 per cent compared to 78.1 per cent.

The region’s overall employment rate means that approximately one in four of the region’s working age population were unemployed (4.3 per cent) or economically inactive (22.3 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, 133,100 jobs (68 per cent) were full-time in Tayside in 2019. This was in line with the Scottish average as a percentage share of jobs. Within the region almost two thirds of full-time jobs (83,100; 62 per cent) were held by males, and the remaining 38 per cent were held by females (50,000).

The percentage of part-time jobs within Tayside was in line with the Scottish average (32 per cent). Overall there were 61,900 part-time jobs in Tayside, females accounted for over two thirds (41,600; 67 per cent). Whilst males accounted for 33 per cent, 20,200 jobs (see Figure 8).

Figure 8
Employment by gender and full-time/part-time (2019), Tayside

<table>
<thead>
<tr>
<th></th>
<th>Full-time</th>
<th>Part-time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>83,100</td>
<td>20,200</td>
</tr>
<tr>
<td>Female</td>
<td>50,000</td>
<td>41,600</td>
</tr>
</tbody>
</table>

Source: Oxford Economics

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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 Tayside, 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, 15 per cent;
- Education, nine per cent; and
- Accommodation and Food Services, also nine per cent.

Real Estate Activities, the sector that made the greatest GVA contribution in 2019 (irrespective of the imputed rent consideration) accounted for a small share of regional employment. The sector accounted for 2,900 jobs, a one per cent share.
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 Tayside, Agriculture, Forestry and Fishing was the greatest specialization with the percentage of employment in this sector 2.5 times greater than the Scottish average. Other sectors that had above average concentrations in Tayside were Electricity, Gas, Steam and Air Conditioning Supply (1.6 times more concentrated) and Accommodation and Food Services (1.3 times more concentrated).

Of the key sectors, Health and Social Care, as might be expected given the sectoral insight above, was the largest in Tayside in 2019. The sector accounted for 31,700 jobs. Tourism was the second largest with a total of 16,700 jobs (see Figure 10).

Figure 10
Employment by Key Sector and share of total employment (2019), Tayside

- Health and social care: 31,700; 16%
- Tourism: 16,700; 9%
- Construction: 15,900; 8%
- Financial and business services: 11,300; 6%
- Food and drink: 9,400; 5%
- Engineering: 8,500; 4%
- Creative industries: 6,600; 3%
- Digital: 3,800; 2%
- Energy: 3,800; 2%
- Child-day care activities: 2,200; 1%
- Life sciences: 1,800; 1%
- Chemical sciences: 1,000; 1%

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, almost two fifths of all occupations (38 per cent) in Tayside were ‘higher level’, 32 per cent were ‘mid-level’ and 29 per cent were ‘lower level’. Compared to Scotland, the occupational structure of Tayside had a greater percentage of the workforce in ‘mid-level’ occupations and fewer elsewhere. Scotland had a greater percentage in ‘higher level’ (45 per cent) and ‘lower-level’ (30 per cent) occupations but fewer in ‘mid-level’ (25 per cent) occupations.

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

- Clerical and Services Elementary Occupations, ten per cent;
- Caring Personal Service Occupations, nine per cent; and
- Administrative Occupations, eight per cent.

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<thead>
<tr>
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<tbody>
<tr>
<td>Clerical and Services Elementary Occupations</td>
<td>18,700; 10%</td>
<td></td>
</tr>
<tr>
<td>Caring Personal Service Occupations</td>
<td>15,900; 9%</td>
<td></td>
</tr>
<tr>
<td>Administrative Occupations</td>
<td>14,600; 8%</td>
<td></td>
</tr>
<tr>
<td>Sales Occupations</td>
<td>9,900; 5%</td>
<td></td>
</tr>
<tr>
<td>Teaching and Research Professionals</td>
<td>9,900; 5%</td>
<td></td>
</tr>
<tr>
<td>Business and Public Service Associate Professionals</td>
<td>9,200; 5%</td>
<td></td>
</tr>
<tr>
<td>Transport and Mobile Machine Drivers and Operatives</td>
<td>9,000; 5%</td>
<td></td>
</tr>
<tr>
<td>Health Professionals</td>
<td>8,200; 4%</td>
<td></td>
</tr>
<tr>
<td>Skilled Metal and Electrical Trades</td>
<td>7,700; 4%</td>
<td></td>
</tr>
<tr>
<td>Corporate Managers</td>
<td>7,300; 4%</td>
<td></td>
</tr>
<tr>
<td>Business and Public Service Professionals</td>
<td>6,800; 4%</td>
<td></td>
</tr>
<tr>
<td>Science and Technology Professionals</td>
<td>6,600; 4%</td>
<td></td>
</tr>
<tr>
<td>Skilled Construction and Building Trades</td>
<td>6,300; 3%</td>
<td></td>
</tr>
<tr>
<td>Managers and Proprietors in Agriculture and Services</td>
<td>6,300; 3%</td>
<td></td>
</tr>
<tr>
<td>Customer Service Occupations</td>
<td>4,400; 2%</td>
<td></td>
</tr>
<tr>
<td>Process, Plant and Machine Operatives</td>
<td>4,100; 2%</td>
<td></td>
</tr>
<tr>
<td>Leisure and Other Personal Service Occupations</td>
<td>4,100; 2%</td>
<td></td>
</tr>
<tr>
<td>Skilled Agricultural Trades</td>
<td>3,900; 2%</td>
<td></td>
</tr>
<tr>
<td>Trades, Plant and Storage Elementary Occupations</td>
<td>3,900; 2%</td>
<td></td>
</tr>
<tr>
<td>Culture, Media and Sports Occupations</td>
<td>3,800; 2%</td>
<td></td>
</tr>
<tr>
<td>Health and Social Welfare Associate Professionals</td>
<td>3,300; 2%</td>
<td></td>
</tr>
<tr>
<td>Science and Technology Associate Professionals</td>
<td>3,300; 2%</td>
<td></td>
</tr>
<tr>
<td>Textiles, Printing and Other Skilled Trades</td>
<td>3,100; 2%</td>
<td></td>
</tr>
<tr>
<td>Protective Service Occupations</td>
<td>3,000; 2%</td>
<td></td>
</tr>
<tr>
<td>Secretarial and Related Occupations</td>
<td>3,000; 2%</td>
<td></td>
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</tbody>
</table>

Source: Oxford Economics
Past Employment
Employment in Tayside decreased by 3.4 per cent from 2009 to 2019. This was largely caused by contraction in prominent, large employing sectors including: Financial and Insurance Activities, -3,200 jobs; Wholesale and Retail Trade, also -3,200 jobs; and Agriculture, Forestry and Fishing, -1,900 jobs.

Whilst these sectors experienced job losses, other sectors grew. The greatest absolute growth occurred in the Education sector in Tayside. Compared to 2009, there were 2,000 additional jobs in the sector in 2019. Growth also occurred in Accommodation and Food Services (1,900 jobs) and Professional, Scientific and Technical Activities (1,400 jobs).

Beyond the sectors, other shifts in the region’s labour market have occurred. Part-time employment increased by 2,200 jobs, whilst full-time employment declined by 9,000 jobs from 2009 to 2019. Female employment also declined by 8,600 jobs whilst male employment increased by 1,800 jobs.

Employment Forecast
The employment decline that has occurred in Tayside in the past is not forecast to continue. From 2019 to 2029 employment growth of 2.0 per cent is forecast in the region. This equates to 0.2 per cent employment change year to year, and 3,900 jobs in total over the forecast period. Compared to Scotland, this is a slower rate of growth. 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.

The employment forecast for the local authorities within Tayside shows a positive outlook. All three local authorities in the region (Angus, Dundee and Perth and Kinross) are forecast to have a net increase in the number of jobs over the forecast period. Dundee is expected to have an annual average increase of 0.3 per cent and Perth and Kinross and Angus are both forecast to have an increase of 0.1 per cent.

Over the period to 2029, full-time employment is expected to increase in Tayside with 2,600 more full-time jobs in 2029 compared to 2019. Both male and female full-time employment will increase, by 1,600 and 1,100 jobs respectively. Part-time employment is also expected to increase by 1,300 jobs. Female part-time employment is forecast to increase by 300 jobs, as well as male part-time employment which is forecast to increase by 1,000 (see Figure 12).

Figure 12
Forecast employment change, by gender and full-time/part-time (2019 - 2029), Tayside

<table>
<thead>
<tr>
<th></th>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full-time</td>
<td>1,600</td>
<td>300</td>
</tr>
<tr>
<td>Part-time</td>
<td>1,000</td>
<td>1,100</td>
</tr>
</tbody>
</table>

Source: Oxford Economics
Although employment is forecast to increase in Tayside from 2019 to 2029, sectors will have varying performance. The greatest growth in jobs is forecast in Administration and Support Services, with 1,400 more jobs expected in the sector by 2029 compared to 2019. Other sectors forecast to have growth of over 1,000 jobs during the forecast period are Professional, Scientific and Technical Activities and Construction (both 1,200 jobs).

Employment is also forecast to grow in Tayside’s public services sector. Public Administration and Defence is forecast to contract by 200 jobs over the forecast period due to continued pressure on public finances. However, this will be offset by growth in the Human Health and Social Work sector (1,000 jobs). Whilst the Education sector is forecast to have no change in employment from 2019 to 2029.

Job losses in Tayside are also forecast in some sectors, notably in the production sectors. Manufacturing is the sector forecast to have the greatest number of job losses from 2019 to 2029. During the forecast period a decline of 2,400 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
Forecast employment change by Industry (2019 - 2029), Tayside

- Administrative and support service activities
- Professional, scientific and technical activities
- Construction
- Human health and social work
- Accommodation and food service activities
- Arts, entertainment and recreation
- Wholesale and retail trade
- Real estate activities
- Other service activities
- Information and communication
- Transportation and storage
- Education
- Agriculture, forestry and fishing
- Mining and quarrying
- Financial and insurance activities
- Water supply, sewerage and waste management
- Public administration and defence
- Electricity, gas and steam
- Manufacturing

Comprising Public administration and defence, Education, and Human health and social work.

Source: Oxford Economics
The growth and contraction of employment by sector means that private services are expected to account for a larger share of jobs in Tayside over the forecast period. The percentage is forecast to rise from 48 per cent in 2019 to 50 per cent in 2029. The Construction sector is also forecast to increase from six per cent to seven per cent over the forecast period. In 2019 Public Services and Primary Industries accounted for 31 per cent and seven per cent of employment respectively. This share is expected to be maintained in 2029. Manufacturing is expected to decline by one percentage point over the forecast period from seven per cent to six per cent in 2029.

Looking ahead, the outlook for the key sectors largely echoes the broad sector trends summarised above – with Construction forecast to have the greatest growth (1,200 jobs). Health and Social Care and Tourism are both forecast to grow by 1,000 jobs from 2019 to 2029 in Tayside.

A number of other key sectors will experience growth over the forecast period, including:
- Financial and Business Services, 900 jobs;
- Child-Day Care Activities, 700 jobs;
- Creative Industries, 200 jobs; and
- Digital, 100 jobs.

Engineering is the key sector forecast to have the greatest employment decline in Tayside, with 400 fewer jobs in 2029 compared to 2019 expected (see Figure 14).

Figure 14
Forecast employment change by Key Sector (2019 - 2029), Tayside

25 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.
By occupation, Caring Personal Service Occupations are forecast to experience the greatest increase in employment in Tayside from 2019 to 2029 (of 700 workers). Growth in these occupations is closely related to the forecast rise in employment in the Health and Social Care sector. An additional 600 workers are expected to be required in Business and Public Service Associate Professionals, driven by expansion across a number of sectors. Other occupations anticipated to have an increase that is relatively large for the region are:

- Business and Public Service Professionals, 600 workers;
- Skilled Construction and Building Trades, 600 workers; and
- Clerical and Services Elementary Occupations, 500 workers.

Occupations likely to contract over the next decade tend to be those most closely associated with Manufacturing reflecting the declining numbers of jobs in this sector. Examples include Skilled Metal and Electrical Trades (-600 people) and Process Plant and Machine Operatives (-300 jobs) (see Figure 15).

**Figure 15**
Forecast employment change by occupation (2019 - 2029), Tayside

Source: Oxford Economics
Total Labour Market Requirement in Tayside
In the previous sections we presented what has happened, is happening and what is forecast to happen in Tayside 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 Tayside, 73,700 job openings are forecast from 2019 to 2029. In the region, and as shown in the previous chapter, 3,900 jobs are forecast to be created in Tayside from 2019 to 2029 due to expansion in the labour market. A further 69,700 job openings will arise due to the replacement requirement.

These opportunities are expected to be concentrated in a small number of sectors, with four sectors in Tayside forecast to account for more than half (56 per cent) of the requirement. These are (see Figure 16):

- Wholesale and Retail Trade, 15,300 jobs;
- Accommodation and Food Services, 9,600 jobs;
- Human Health and Social Work, 8,800 jobs; and
- Agriculture, Forestry and Fishing, 7,300 jobs.

Job openings can be full or part time and the job openings forecast could be higher or lower in reality. Please note that throughout this section totals may not equal the sum of constituent parts due to rounding.
Figure 16
Forecast net requirement by Industry (2019 - 2029), Tayside

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 67,700 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 Tayside is expected to increase by 3,400 over the forecast period. There will also be a replacement requirement of 64,300 people.

By occupation, the greatest number of people are forecast to be required in (see Figure 17):
- Clerical and Service Elementary Occupations, 11,100 people;
- Sales Occupations, 8,700 people;
- Teaching and Research Professions, 7,000;
- Caring Personal Service Occupations, 4,300 people; and
- Administrative Occupations, 4,200 people.

Figure 17
Forecast net requirement by occupation (2019 - 2029), Tayside

Source: Oxford Economics
Supply of People in Tayside
Supply of People in Tayside

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 Tayside was 415,500, eight per cent of Scotland’s population.

By age, the largest group in Tayside were people of working age (16-64 years). There were 261,300 people in this age group, 63 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 Tayside was 59 per cent. This means that for every 100 people of working age, there were 59 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 86,400 people aged 65 or older who accounted for 21 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 Tayside. The region accounts for nine per cent of Scotland’s population aged 65 or over compared to eight per cent for all ages.

Children and young people (0-15 years) accounted for the remaining 16 per cent, there were 67,800 individuals in this age group (see Figure 18).

Figure 18

Population by age (2016), Tayside 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 Tayside, there were 16,000 people who were born in the EU and a further 15,000 from the rest of the world in 2018. The EU born population accounted for four per cent of the region’s population, and four per cent of the region’s population were born elsewhere in the world. Compared to Scotland the same 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 Tayside is projected to increase by approximately 16,700 people. Equating to a four per cent increase, this is lower than Scotland’s projected growth rate 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 63 per cent in 2016 to 58 per cent in 2041; a projected decrease of 12,800 people.

The largest increases are expected in the 65 or older age groups, with a 71 per cent increase projected for those aged 75+ (an additional 28,100 people) and seven per cent among those aged 65-74 (an additional 3,400 people). There is a forecast decline in all other age groups over the period, with the most substantial decline of ten per cent projected for those aged 16-29, a projected fall of 7,700 people.

These shifts suggest that the region could have a larger 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 74 per cent. Ranging across the region from 58 per cent in Dundee City (fourth lowest of all local authorities) to 84 per cent in Angus and Perth and Kinross. Across Scotland the dependency ratio is expected to rise to 70 per cent (see Figure 19).
Skills Shortages, Gaps and Challenges in Tayside
Skills Shortages, Gaps and Challenges in Tayside

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. In 2017, the number of employers reporting at least one SSV in Tayside was seven per cent, compared to six per cent for Scotland. This suggests a challenge that extends further across the region’s labour market compared to Scotland’s. The incidence of SSVs in the region was lower in 2015 (five per cent), whereas across Scotland the incidence of SSVs has remained the same (six per cent) from 2015 to 2017.

Density in Tayside, which indicates how many vacancies were SSVs, was in line with Scotland in 2017 (24 per cent). This was an increase in the region from 23 per cent in 2015 whereas density across Scotland remained the same. This suggests that employers are facing difficulties across a number of roles, with the number of vacancies that were SSVs broadly similar in the region compared to 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 can make it hard to fill vacancies. In Tayside, 27 per cent of employers tried to recruit non-UK nationals to overcome hard to fill vacancies, compared to 41 per cent in Scotland. Across Scotland, most employers (89 per cent) who sought to recruit non-UK nationals considered EU nationals. Equivalent data for Tayside is not available however 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.

Figure 20
Skills Shortage Vacancies (2015 and 2017), Tayside

Source: Employer Skills Survey
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 17 per cent in Tayside, compared to 16 per cent for Scotland. Since 2015, the incidence of skills gaps in the region has increased. In 2015, 15 per cent of employers experienced a skills gaps—greater than the percentage across Scotland that year (13 per cent).

Overall, 5.5 per cent of the workforce in Tayside had a skills gap in 2017. This was a decrease from 6.2 per cent in 2015, and above the Scottish rate of 4.9 per cent in 2015 and 5.0 per cent in 2017. This, alongside the insight on incidence, suggests that skills gaps are as far reaching, and more concentrated, in Tayside compared 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), Tayside

<table>
<thead>
<tr>
<th>Percentage of employers with a Skills Gap</th>
<th>Percentage of the workforce with a Skills Gap</th>
</tr>
</thead>
<tbody>
<tr>
<td>15%</td>
<td>6.2%</td>
</tr>
<tr>
<td>17%</td>
<td>5.5%</td>
</tr>
</tbody>
</table>

Source: Employer Skills Survey
Most employers in Tayside acted to overcome skills gaps, and 20 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 Tayside 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 lower in Tayside in 2017 compared to Scotland, 34 per cent and 35 per cent respectively. Whilst lower, this still suggests that more than one third of employers in the region had skills and talent going unused. From 2015 to 2017 the percentage of employers reporting skills mismatch has remained the same in Tayside. However, skills under-utilisation increased across Scotland, up from 32 per cent in 2015.

The proportion of staff under-utilised has declined in the region, from 9.4 per cent in 2015 to 8.5 per cent in 2017. This suggests that whilst the percentage of employers in the region experiencing skills under-utilisation has remained the same, in general the number of their employees under-utilised has declined. 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 overall (see Figure 22).

<table>
<thead>
<tr>
<th>Year</th>
<th>Tayside</th>
<th>Scotland</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>34%</td>
<td>35%</td>
</tr>
<tr>
<td>2017</td>
<td>8.5%</td>
<td>9.2%</td>
</tr>
</tbody>
</table>

**Figure 22**

Skills Under-Utilisation (2015 and 2017), Tayside

Source: Employer Skills Survey

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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 68 per cent of employers in Tayside (as of 2017). This was lower than, but close, to the percentage of employers across Scotland who anticipated a need to upskill (69 per cent). Within the region, operational skills were the most commonly mentioned development area (72 per cent compared to 57 per cent across Scotland). The need to upskill digital skills was higher in the region compared to Scotland (60 per cent compared to 49 per cent), as was the expected need to upskill complex analytical skills (46 per cent compared to 44 per cent) (see Figure 23). The evidence suggests that whilst fewer employers in Tayside expect to upskill their workforce in the next twelve months, the upskilling requirement typically covered more skills.

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

<table>
<thead>
<tr>
<th>Skill Type</th>
<th>Tayside (%)</th>
<th>Scotland (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complex analytical skills</td>
<td>46%</td>
<td>44%</td>
</tr>
<tr>
<td>Operational skills</td>
<td>72%</td>
<td>57%</td>
</tr>
<tr>
<td>Digital skills</td>
<td>60%</td>
<td>49%</td>
</tr>
</tbody>
</table>

Source: Employer Skills Survey
Conclusion
Conclusion
In 2019 Tayside made a GVA contribution to the Scottish economy of £10.5bn, eight per cent of Scotland’s output (£138.8bn). Looking ahead, the economy is forecast to grow by 1.5 per cent on average each year up to 2029. This rate of growth would be slower than what is forecast across Scotland, and slower than the rate of growth that occurred within Tayside 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 Tayside (measured by jobs) was estimated to be 194,900 in 2019, seven per cent of Scottish employment. Employment in the region declined from 2009 to 2019, but the forecast suggests that growth will occur in the future from 2019 to 2029. The three sectors forecast to have the greatest jobs growth are:
- Administrative and Support Service Activities; 1,400 jobs;
- Professional, Scientific and Technical Activities, 1,200 jobs; and
- Construction, also 1,200 jobs.

As the region’s share of Scotland’s employment was lower in 2019 than its share of GVA productivity performance was above average. Productivity was £53,900 in Tayside compared to £50,400 across Scotland.

The employment growth forecast will create 3,900 new jobs in the region and the need to replace workers leaving the labour market will create further 69,700 opportunities. Vacancies arising due to the replacement requirement far outweigh those created by growth.

To fill these jobs, and others, there is a forecast requirement for 67,700 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:
- Clerical and Service Elementary Occupations, 11,100 people;
- Sales Occupations, 8,700 people;
- Teaching and Research Professions, 7,000;
- Caring Personal Service Occupations, 4,300 people; and
- Administrative Occupations, 4,200 people.

Whilst there will be demand for people to fill jobs, the population projection suggests that Tayside could have a larger 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 decline in the working age population;
- Pressures on public finances and services could increase due to a growing dependency ratio, the region’s dependency ratio is expected to reach 74 per cent by 2041, up from 59 per cent in 2016; and
- Migration has been a driver of population growth across Scotland and an important source of skilled labour. In the region, eight per cent of the population were born outside of the UK, and 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.
Tayside is part of the area covered by the Tay Cities Deal (which also includes North East (NE) Fife). There is strong collaboration between public bodies, businesses and the voluntary sector across the area reflecting their shared ambitions. All four local authorities sit on the Joint Committee and the Management Group and work closely with the Tay Cities Enterprise Executive and the Higher Education (HE)/Further Education (FE) Forum.

The Skills Advisory Board sits under, and feeds into, the Management Group along with the Transport Advisory Board, Digital Advisory Board, Tourism and Culture Advisory Board, Innovation Advisory Board and International Advisory Board.

The Regional Skills Investment Plan (RSIP) for the Tay Cities Region was published in August 2019. The RSIP covers Tayside and NE Fife (data for which is not included in this RSA) and corresponds to the area covered by the Tay Cities Deal. The purpose of the RSIP is to provide a practical way forward for dealing effectively with issues that need to be resolved to promote inclusive growth in the region, fully supporting the delivery of the Regional Economic Strategy by helping to:

- Raise productivity to the Scottish average;
- Close the jobs gap and improve job quality;
- Reduce unemployment; and
- Build on sectoral strengths and opportunities.

The Regional Economic Strategy was updated in 2019. The aim of which is to make the Tay Cities Region one of the most exciting, dynamic and desirable areas of Europe in which to live, work, invest and visit.

The Regional Economic Strategy outlines the ambition to:

- Mitigate the potential impact of Brexit;
- Capitalise on any opportunities arising from the UK’s departure from the EU;
- Increase the number of businesses across the region;
- Create more, better-paid jobs across the region;
- Reduce unemployment / increase employment to levels better than the Scottish average; and
- Increase productivity.

The Heads of Terms for the Tay Cities Deal were signed in November 2018 with the UK and Scottish Governments each investing up to £150 million over the next ten to 15 years.

Within the City Region Deal the Scottish Government will invest up to £20 million to support delivery of the Tay Cities Skills and Employability Development Programme to deliver Fair Work. The Programme will reduce skills shortages and gaps and deliver incremental system-wide improvements to ensure Inclusive Growth by boosting the flow of individuals from disadvantaged groups and support reskilling into the career opportunities that will be generated through, and as a result of, the investment in the Tay Cities Region.

The RSA for Tayside highlights the current challenges facing the Tayside economy. However, these challenges are being addressed through the RSIP, the Regional Economic Strategy and the Tay Cities Deal, all of which include both Tayside and NE Fife. It is anticipated that the actions agreed across the partnership groups will promote inclusive economic growth and address inequality across the Tay Cities Region and provide pathways into and through employment for the region’s residents whilst removing barriers such as access to transport and the skills required for the world of work.

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