Regional Skills Assessments
Scottish Borders
March 2021
Regional Skills Assessments (RSAs) are a single, agreed evidence base created to inform investment in skills. This infographic is for the Scottish Borders, and provides the latest Labour Market Intelligence as of March 2021. It uses a range of trusted sources to show current and future economic contribution as well as current and future skills demand. Further disaggregation of Oxford Economics forecast data is available in the updated RSA Data Matrix.

The Economy and Labour Market pre-COVID-19

The economy & productivity
Scotland has had long term challenges in terms of increasing economic growth and productivity. Both have been experiencing slow growth, behind that of the UK.

Demographic Change
Scotland’s birth rate is lower than the rest of the UK, it has an ageing population and there are potential changes to the pattern of inward migration due to Brexit, which create a significant strategic driver.

Inclusive Growth
It is recognised that in Scotland ‘deep inequalities still exist in our society’. Inclusive growth seeks to deliver ‘growth that combines increases in prosperity with greater equity, creates opportunities for all and distributes the dividends of increased prosperity fairly’.

Automation
Advances in technological developments, such as automation, artificial intelligence and digitisation, will impact the world of work in the future. To give a sense of scale in Scotland around 46 per cent of jobs have a high potential for automation.

Climate Change
Scotland aims to achieve a net-zero target by reducing carbon emissions across all sectors of the economy by 2045. The labour market is expected to be affected as the economy moves towards greater sustainability.

Skills Shortages and Skills Gaps
In 2017, almost one quarter (23%) of all vacancies in the Scottish Borders were skills shortage vacancies and 11% of establishments reported at least one staff member not fully proficient in their role. Further, over one third (35%) of establishments in the region had at least one member of staff who was under-utilised.

Brexit is a further factor that is expected to exacerbate economic and labour market challenges.
**Spotlight on Demography**

**Scottish Borders Population 2018-2043**

Total population 2018: 115,300

Forecast change 2018 to 2043:
- Scottish Borders: 900, (0.8%)
- Scotland: -3,300, (-4.8%)
- United Kingdom: 5,982,400 (9.0%)

Forecast change 2018 to 2043:
- Scottish Borders: 900, (0.8%)
- Scotland: -136,700, (-2.5%)
- United Kingdom: 5,982,400 (9.0%)

**Working age population 2018:** 67,900

Forecast change 2018 to 2043:
- Scottish Borders: -3,300, (-4.8%)
- Scotland: -7,300, (-0.2%)
- United Kingdom: 2,644,500 (6.4%)

**Dependency Ratio for the Scottish Borders:**
- 2018: 70%
- 2043: 80%

**Dependency Ratio for Scotland:**
- 2018: 56%
- 2043: 60%

The dependency ratio considers the non-working age (0-15 years and 65+) population compared to those of working age. A ratio of 70% would mean that for every 1,000 people of working age there were 700 of non-working age. The dependency ratio is important when considering the demand for public services and the funds available to provide these services - the income from taxes and National Insurance.
The Impact of COVID-19 on the Economy

Scotland

Reflecting the impact of new restrictions, Scotland’s GDP is estimated to have fallen by 2.3% in January 2021. This is the third month where output fell following six months of growth. GDP remained 8.4% lower in January 2021 compared with February 2020 (prior to the onset of the pandemic)7a. Across Q4 2020 the Scottish Government has estimated that GDP increased by 2.0%, with growth having slowed considerably in comparison with the 15.8% increase in quarter three 7b.

Across the whole of 2020 the Scottish Government has estimated that GDP fell by 9.6% 7b. Forecasts released by the Scottish Fiscal Commission in January 2021 estimated that Scottish GDP would not return to pre-pandemic levels until the beginning of 20247c. However, newer forecasts released by Fraser of Allander following the UK budget announcement in March suggest a return to pre-pandemic GDP in Scotland by Autumn 2022 in their central scenario 7d.

The Regional Economy

Gross Value Added (GVA)8

Total Scottish Borders GVA 2020: £1,907m and 2% of total Scottish output

From 2010-2020, GVA in the Scottish Borders: increased by 9.2% or £160m

Forecast average annual growth (2020-2030):
Scottish Borders: 1.9%
Scotland: 2.2%
United Kingdom: 2.4%

Productivity9

Scottish Borders productivity 2020: £36,900, in Scotland it was £45,500

From 2010-2020, Productivity in Scottish Borders: increased by 5.0% or £1,800

Forecast average annual growth (2020-2030):
Scottish Borders: 1.8%
Scotland: 1.9%
United Kingdom: 2.0%

The greatest contributing factor to each region’s economic recovery will be their sectoral footprint, however other place based factors will also influence their recovery. This includes the persistence of COVID-19 in the community and greater levels of homeworking altering demand for services – particularly in urban areas – as well as factors less specific to COVID-19, such as levels of deprivation and the number of highly skilled/educated workers in the region.10

Oxford Economics Forecast data has been updated to reflect the current impact of COVID-19 as of November 2020.
The majority of the Scottish districts are more vulnerable to the coronavirus pandemic compared with the GB average, with urban districts being more resilient.

Scottish Borders
140.3
3rd most vulnerable local authority

Business environment contributed to the locality’s vulnerability (with a score of 164.5), suggesting a higher share of small firms and self-employment. Digital connectivity (score of 180.9) was also a factor in the Scottish Border’s vulnerability, suggesting low working from home rates and low broadband speed. However, economic diversity (score of 89.4) contributed to the Scottish Border’s resilience, suggesting lower reliance on GVA in sectors more exposed to COVID-19.

“The majority of the Scottish districts are more vulnerable to the coronavirus pandemic compared with the GB average, with urban districts being more resilient.”

The Oxford Economics Vulnerability Index considers a local authority’s economic diversity, business environment and digital connectivity to consider how able, or not, an area is to withstand and respond to the economic shock resulting from COVID-19.

A score above 100 on the index means an area is more vulnerable than the Great Britain average.
The Impact of COVID-19 on Business

Business Turnover Index January 2021

The Monthly Business Turnover Index provides an early indication of business activity in Scotland, covering around half of the economy. It reports the net balance of firms reporting increased or decreased turnover, in real terms, compared to 12 months ago. Values below 50 indicate that more companies are showing decreased turnover.

- Scotland’s Business Turnover Index was 38.5 in January, indicating a decrease in business activity compared to the same month last year. The index remains considerably below pre-pandemic levels, with most businesses reporting lower sales than the previous year.
- Turnover remains lower in all reported industries compared to 12 months ago, except for Food Retail and Transport, Storage and Communication.

Job Postings in Scottish Borders

In the Scottish Borders there were 4% fewer job postings in Week 10 2021 (March) compared to 2020

In the Scottish Borders new postings increased by 135% between Week 14 2020 (beginning of April) and Week 10 2021

In Scotland there were 15% fewer job postings in Week 10 2021 (March) compared to 2020

In Scotland new postings increased by 91% between Week 14 2020 (beginning of April) and Week 10 2021

Weekly job postings in the Scottish Borders for 2019, 2020 and 2021

Week 1 refers to the first Saturday in January (e.g. 4th January 2020)
The Impact of COVID-19 on Business and People

Furloughed Jobs by Region*
The UK Government have announced that the Coronavirus Job Retention Scheme will be extended to September 2021. The rules allow individuals made redundant before 23rd September to be re-hired and placed on furlough leave. There are concerns that continued weak economic performance could mean furlough is a precursor to redundancy14.

Number of jobs furloughed in Scottish Borders at 28th February:
7,200
accounted for 2.0% of Scotland’s furloughed workforce

Females: 3,900
Males: 3,300

Number of jobs furloughed at 28th February in Scotland:
364,100
Females: 189,600
Males: 174,500

Fully furloughed: 255,300
Partially furloughed: 108,800

*Figures at 28th February 2021 are provisional and will be revised in the future.

Redundancy15


PACE information provision (Individuals):
Scottish Borders:
Apr-Jul: 205
Apr-Feb: 765
Scotland:
Apr-Jul: 13,935
Apr-Feb: 33,222

PACE engagement (Employers):
Scottish Borders:
Apr-Jul: 5
Apr-Feb: 20
Scotland:
Apr-Jul: 355
Apr-Feb: 954

PACE information provision for individuals in the Scottish Borders 1st April 2020 – 28th February 2021
Sectors with the greatest information provision for individuals:
- Electricity, Gas, Steam and Air Conditioning Supply: 310
- Manufacturing: 220
- Wholesale and Retail Trade: 130
- Accommodation and Food Services: 40

* Sub-Scotland data is rounded to the nearest 5

Number of jobs furloughed at 28th February in Scotland:
364,100
Females: 189,600
Males: 174,500

Fully furloughed: 255,300
Partially furloughed: 108,800

*Figures at 28th February 2021 are provisional and will be revised in the future

Modern Apprenticeship Redundancies

MAs in training (1st January 2021):
Scottish Borders: 715
Scotland: 34,725

MA redundancies (1st April 2020 – 1st January 2021):
Scottish Borders: 13
Scotland: 834

The Coronavirus Job Retention Scheme is likely to be masking the full economic impact of the pandemic. We may see an increase in the number of MA redundancies when furlough is no longer an option for businesses.
Regional and national unemployment

COVID-19 has led to increased unemployment in Scotland. There were 114,000 people unemployed in Scotland aged 16+ over the period November 2020 to January 2021. Whilst this was 4,000 less than the previous three-month period (August – October 2020) there were an additional 18,000 people unemployed compared to the same point last year (November 2019 – January 2020).

Comparable regional data is not available for November 2020 to January 2021. However, we can report unemployment data for those aged 16 and over and those aged 16-24 between October 2019 and September 2020. Data showed the unemployment rate for the 16+ population in the Scottish Borders was lower than Scotland. The youth unemployment rate for the Scottish Borders is not available.

Unemployment 16+ population:
- Scottish Borders*: 700 (1.2%)
- Scotland: 96,400 (3.5%)

Unemployment 16-24 population:
- Scottish Borders: Data unavailable
- Scotland: 36,400 (11.1%)

* Data should be treated with caution due to small sample size

The Impact of COVID-19 on Employment

Data on Universal Credit claimants is a useful and timely barometer and from it we can see a sharp rise in claimants, suggesting an immediate number of job losses since the outbreak of COVID-19.

Since March 2020, across Scotland the number of Universal Credit claimants has increased by 224,400, from 264,100 to 488,600 in February 2021 (provisional).

Regional Unemployment Scenarios

The trajectory of Scotland’s recovery from COVID-19 is uncertain. Forecasts suggest unemployment may begin to reach pre-pandemic levels towards the end of Q1 2025.

We have modelled some possible unemployment scenarios based on data from the Annual Population Survey (2020 denominators). They provide an indicative sense of scale to the possible unemployment challenges ahead (rate and number of people).
Participation in Education, Training and Employment

Percentage of 16-19 year olds Participating in 2020
95% of 16-19 year olds were participating in education, training or employment in the Scottish Borders, compared to 92% in Scotland:

- **Education**: Scottish Borders: 72%
  Scotland: 72%

- **Employment**: Scottish Borders: 21%
  Scotland: 18%

- **Training and Development**: Scottish Borders: 1%
  Scotland: 2%

Percentage of 16-19 year olds Not-Participating in 2020
2% were not participating in the Scottish Borders compared to 3% in Scotland:

- **Unemployed Seeking**: Scottish Borders: 1%
  Scotland: 1%

- **Unemployed Not-Seeking**: Scottish Borders: 1%
  Scotland: 2%

Percentage of 16-19 year olds Unconfirmed in 2020
4% with an unconfirmed status in the Scottish Borders compared to 5% in Scotland

Of the total of those participating in Scottish Borders:

- **Females**: 49%
- **Males**: 51%

Successful full-time College qualifiers, 2018/19

**Scottish Borders**: 700
**Scotland**: 48,600

Of the successful college qualifiers in the region, 81% went on to positive destinations and 36% left the college sector.

Successful University qualifiers, 2019/20

**Scotland**: 75,700

University provision is available through dedicated campuses in the Scottish Borders, however data is not available at this campus level.
Current Demand for Skills

**Scottish Borders Employment**

Workforce size 2020: 48,300 people

The workforce was expected to shrink between 2019 and 2020, as a result of COVID-19: down by 1.8% or 900 people

Compared to a Scottish decrease of 0.8% or 22,200 people

**Top Employing Industries, Scottish Borders, 2020**

<table>
<thead>
<tr>
<th>Industry</th>
<th>2020</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Human health activities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Retail trade, except of motor vehicles</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Education</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Crop and animal production</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Specialised construction activities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Public administration and defence</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Social work activities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Food and beverage service activities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wholesale trade, except of motor...</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sports activities and amusement</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manufacture of food products</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Residential care activities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wholesale and retail trade</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accommodation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other personal service activities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Construction of buildings</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Legal and accounting activities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manufacture of wearing apparel</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Land transport and transport</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manufacture of computer, electronics</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Top Employing Occupations, Scottish Borders, 2020**

- Caring Personal Service Occupations: 3,700
- Corporate Managers: 3,600
- Sales Occupations: 3,400
- Health Professionals: 3,300
- Administrative Occupations: 3,100
- Elementary Occupations: Clerical and Services: 2,600
- Business and Public Service Professionals: 2,500
- Process Plant and Machine Operatives: 2,400
- Managers/ Proprietors in agriculture and services: 2,300
- Skilled Agricultural Trades: 2,200

**Qualification profile, 2020**

- SCQF 11-12: Borders 9%, Scotland 10%
- SCQF 9-10: Borders 20%, Scotland 22%
- SCQF 7-8: Borders 15%, Scotland 16%
- SCQF 6: Borders 14%, Scotland 16%
- SCQF 5: Borders 19%, Scotland 17%
- SCQF 1-4: Borders 17%, Scotland 12%
- No qualifications: Borders 5%, Scotland 8%

Oxford Economics Forecast data has been updated to reflect the current impact of COVID-19 as of November 2020.
Online job postings data provides a useful barometer for the health of the jobs market alongside the insight on the previous page. It can help us to understand a wide range of factors including in-demand roles and skills sought by employers in real-time.

It is however important to note that the data does not capture all activity, so it should be considered as an estimate of activity only.

Following a 68% decrease between March and April 2020, job postings more than doubled between April 2020 and February 2021. While this indicates the return of some recruitment activity, there were around 19% fewer job postings in February 2021 compared to the same point last year. This suggests that employment activity has not fully recovered to pre-pandemic levels of recruitment.

The composition of job postings was similar in February 2021 compared to February 2020, with the highest demand for Information Technology and Telecommunication Professionals. In February 2021 occupations with the highest number of job postings included Caring and Personal Services and Business, Research and Administrative Professionals.
Job Postings in the Scottish Borders

Not all job postings specify the skills required for the role, likewise the detail varies between adverts. Based on information from approximately 43% of job postings in the Scottish Borders, the most requested specialised skills were:

- Teaching: 441
- Teamwork / Collaboration: 417
- Customer Service: 354
- Account Adjustment: 204
- Social Services: 193
- Cleaning: 187
- Mental Health: 175
- Child Care: 172
- Budgeting: 157
- Staff Management: 146
- Care Planning: 136
- Sales: 123
- Social Work: 108
- Accounting: 98
- Retail Industry Knowledge: 91

The jobs with the greatest number of postings in the Scottish Borders were:

- Care workers and home carers: 400
- Nurses: 197
- Primary and nursery education teaching professionals: 138
- Teaching assistants: 127
- Cleaners and domestics: 108
- Other administrative occupations: 100
- Secondary education teaching professionals: 91
- Customer service occupations: 89
- Sales related occupations: 89
- Nursery nurses and assistants: 85
- Managers and proprietors in other services: 84
- IT user support technicians: 82
- Social workers: 82
- Information technology and telecommunications professionals: 78
- Sales and retail assistants: 65
- Chartered and certified accountants: 60
- Elementary construction occupations: 60
- Van drivers: 57
- Teaching and other educational professionals: 56
- Programmers and software development professionals: 55
- Carpenters and joiners: 50
- Pharmacists: 50
- Kitchen and catering assistants: 46
- Senior professionals of educational establishments: 44
- Medical practitioners: 43
Future Demand for Skills – Job Openings in the mid-term (2020 - 2023)²⁶

In the Scottish Borders, the labour market is forecast to face some challenges in the immediate term. The forecasts for the mid-term (2020-2023) however suggest there could be some jobs growth and opportunities created as a result of the need to replace workers leaving the labour market due to retirement and other reasons.

Whilst positive, caution is needed as there are still a wide range of unknowns concerning Scotland’s recovery from the pandemic. The jobs market could also be competitive, with the number of people seeking jobs outnumbering the opportunities available. Skills mismatches and job quality will also be important factors to consider.

### Scottish Borders

600 people Expansion Demand

5,400 people Replacement Demand

6,000 people to fill Job Openings,

with the greatest requirement for people with higher education level qualifications:

<table>
<thead>
<tr>
<th>SCQF 11-12</th>
<th>SCQF 7-10</th>
<th>SCQF 6</th>
<th>SCQF 5</th>
<th>SCQF 1-4</th>
<th>No quals.</th>
</tr>
</thead>
<tbody>
<tr>
<td>300 (6%)</td>
<td>2,900 (48%)</td>
<td>900 (15%)</td>
<td>1,200 (21%)</td>
<td>200 (3%)</td>
<td>400 (7%)</td>
</tr>
</tbody>
</table>

### Scotland

40,400 people Expansion Demand

297,400 people Replacement Demand

337,800 people to fill Job Openings,

with the greatest requirement for people with higher education level qualifications:

<table>
<thead>
<tr>
<th>SCQF 11-12</th>
<th>SCQF 7-10</th>
<th>SCQF 6</th>
<th>SCQF 5</th>
<th>SCQF 1-4</th>
<th>No quals.</th>
</tr>
</thead>
<tbody>
<tr>
<td>23,400 (7%)</td>
<td>158,800 (47%)</td>
<td>44,200 (13%)</td>
<td>70,400 (21%)</td>
<td>15,000 (4%)</td>
<td>26,000 (8%)</td>
</tr>
</tbody>
</table>

The Scottish Borders is forecast to account for 2% of Scotland’s total number of job openings in the mid-term (2020 – 2023)

Oxford Economics Forecast data has been updated to reflect the current impact of COVID-19 as of November 2020.
Skilled Agriculture Trades
Expansion Demand: 100
Greatest requirement for qualifications: SCQF 5

Managers, Proprietors in Agriculture & Services
Expansion Demand: 100
Greatest requirement for qualifications: SCQF 7

Caring Personal Service Occupations
Expansion Demand: 100
Greatest requirement for qualifications: SCQF 7-10

Elementary Occupations: Trades, Plant and Storage related
Expansion Demand: 100
Greatest requirement for qualifications: SCQF 1-4, 5

Culture, Media and Sports Occupations
Expansion Demand: less than 50
Greatest requirement for qualifications: SCQF 7-10

Business and Public Service Professionals
Expansion Demand: less than 50
Greatest requirement for qualifications: SCQF 7-10

Skilled Construction and Building Trades
Expansion Demand: less than 50
Greatest requirement for qualifications: SCQF 1-4

Leisure and Other Personal Service Occupations
Expansion Demand: less than 50
Greatest requirement for qualifications: SCQF 5

Forecasts suggest a requirement for less than 50 people to fill job openings in Child-day care activities (within Education) in the Scottish Borders

Oxford Economics Forecast data has been updated to reflect the current impact of COVID-19 as of November 2020
The forecasts for the long-term (2023–2030) highlight that strong jobs growth is not forecast to continue in the Scottish Borders. However, it is expected that there could be an ongoing requirement for skilled people to fill opportunities created by people leaving the labour market. This feature of the labour market, known as the replacement requirement, is a symptom of the demographic change strategic driver.

The long-term forecast is changeable and could be influenced by a range of factors both related and not to Scotland’s post COVID-19 recovery. National and local policy, investment and initiatives could all influence the long-term outlook presented.

Scottish Borders

-200 people Expansion Demand

11,600 people Replacement Demand

11,400 people to fill Job Openings,

with the greatest requirement for people with higher education level qualifications:

<table>
<thead>
<tr>
<th>SCQF 11-12</th>
<th>SCQF 7-10</th>
<th>SCQF 6</th>
<th>SCQF 5</th>
<th>SCQF 1-4</th>
<th>No quals.</th>
</tr>
</thead>
<tbody>
<tr>
<td>600 (5%)</td>
<td>5,900 (51%)</td>
<td>1,800 (16%)</td>
<td>2,400 (21%)</td>
<td>Less than 50 (0.2%)</td>
<td>700 (6%)</td>
</tr>
</tbody>
</table>

653,700 people to fill Job Openings,

with the greatest requirement for people with higher education level qualifications:

<table>
<thead>
<tr>
<th>SCQF 11-12</th>
<th>SCQF 7-10</th>
<th>SCQF 6</th>
<th>SCQF 5</th>
<th>SCQF 1-4</th>
<th>No quals.</th>
</tr>
</thead>
<tbody>
<tr>
<td>45,600 (7%)</td>
<td>331,900 (49%)</td>
<td>84,600 (12%)</td>
<td>153,400 (22%)</td>
<td>19,600 (3%)</td>
<td>48,800 (7%)</td>
</tr>
</tbody>
</table>

Scottish Borders is forecast to account for 2% of Scotland’s total number of job openings in the long-term (2023 – 2030)

Oxford Economics Forecast data has been updated to reflect the current impact of COVID-19 as of November 2020.
Future Demand for Skills – Total Employment, Expansion Demand, Replacement Demand

Scottish Borders Total Employment 2023-2030

Workforce size 2030: 48,700 people

The workforce is forecast to contract between 2022 and 2030, with the contraction occurring from 2023: decrease by 0.3% or 200 people

Compared to a Scottish increase of 1.1% or 30,300 people

The economic impacts of COVID-19 are not being felt equally by all groups in society. People living on low incomes, women, disabled people, people from ethnic minority groups, lone parents, children, young people and older people are more likely to be disproportionately affected.

Total Requirement by Industry, Scottish Borders, 2023-2030

<table>
<thead>
<tr>
<th>Industry</th>
<th>Requirement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wholesale and retail trade</td>
<td>2,400</td>
</tr>
<tr>
<td>Agriculture, forestry and fishing</td>
<td>1,900</td>
</tr>
<tr>
<td>Human health and social work</td>
<td>1,800</td>
</tr>
<tr>
<td>Accommodation and food services</td>
<td>900</td>
</tr>
<tr>
<td>Arts, entertainment and recreation</td>
<td>900</td>
</tr>
<tr>
<td>Education</td>
<td>900</td>
</tr>
<tr>
<td>Construction</td>
<td>900</td>
</tr>
<tr>
<td>Administrative and support services</td>
<td>600</td>
</tr>
<tr>
<td>Transportation and storage</td>
<td>500</td>
</tr>
<tr>
<td>Public administration and defence</td>
<td>400</td>
</tr>
<tr>
<td>Water supply</td>
<td>200</td>
</tr>
<tr>
<td>Professional, scientific and technical</td>
<td>200</td>
</tr>
<tr>
<td>Electricity, gas, steam and air conditioning supply</td>
<td>100</td>
</tr>
<tr>
<td>Other service activities</td>
<td>0</td>
</tr>
<tr>
<td>Information and communication</td>
<td>0</td>
</tr>
<tr>
<td>Real estate</td>
<td>0</td>
</tr>
<tr>
<td>Mining and quarrying</td>
<td>0</td>
</tr>
<tr>
<td>Financial and insurance</td>
<td>0</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>-300</td>
</tr>
</tbody>
</table>

Employment Growth by Occupation, Scottish Borders, 2023-2030

- **Caring Personal Service**
  - Expansion Demand: 300
  - Greatest requirement for qualifications: SCQF 5

- **Health Professionals**
  - Expansion Demand: 200
  - Greatest requirement for qualifications: SCQF 7-10

- **Managers, Proprietors in Agriculture and Services**
  - Expansion Demand: 100
  - Greatest requirement for qualifications: SCQF 7-10

- **Business and Public Service Professionals**
  - Expansion Demand: 100
  - Greatest requirement for qualifications: SCQF 7-10

- **Culture, Media and Sports Occupations**
  - Expansion Demand: 100
  - Greatest requirement for qualifications: SCQF 1-4

Forecasts suggest the requirement for less than 100 people to fill job openings in Child-day care activities (within Education) in the Scottish Borders.

Oxford Economics Forecast data has been updated to reflect the current impact of COVID-19 as of November 2020.
In the Scottish Borders, Public Sector employment accounts for around a third of total employment in the region. The forecasts for the mid-term (2020-2023) and long-term (2023-2030) are forecast to continue as it is expected that there could be an ongoing requirement for skilled people to fill opportunities created by people leaving the labour market.

The long-term forecast is changeable and could be influenced by a range of factors both related and not to Scotland’s post COVID-19 recovery. National and local policy, investment and initiatives could all influence the long-term outlook presented.

### Public Sector Employment (people), Scottish Borders, 2020

<table>
<thead>
<tr>
<th>Activity</th>
<th>Employment (people)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Human health and social work activities</td>
<td>8,300</td>
</tr>
<tr>
<td>Education</td>
<td>3,600</td>
</tr>
<tr>
<td>Public administration and defence</td>
<td>2,100</td>
</tr>
</tbody>
</table>

### Public Sector Job Openings in the Scottish Borders in the mid-term (2020–2023)

- **100** people Expansion Demand
- **1,300** people Replacement Demand
- **1,400** people to fill Job Openings

### Public Sector Job Openings in the Scottish Borders in the long-term (2023–2030)

- **400** people Expansion Demand
- **2,700** people Replacement Demand
- **3,100** people to fill Job Openings

*Job postings data rounded to the nearest 100*

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*Oxford Economics Forecast data has been updated to reflect the current impact of COVID-19 as of November 2020.*
Opportunities for Recovery – Resilience, Growth, Job Openings

Summary

It will take some time to fully understand the economic impact of COVID-19 due to time lags in the data and initiatives like the Coronavirus Job Retention Scheme that has provided some temporary shelter for the workforce in affected sectors. However, we expect there to be challenges ahead as fiscal support is gradually withdrawn and we move into the restart and recovery phases. As a result, SDS is committed to updating the RSA evidence base to support all partners and stakeholders with skills planning as we learn more about the new normal.

Scottish Borders appears to be a more vulnerable region, yet employment growth is forecast over the mid and long term. The workforce was expected to shrink by 1.8 per cent (or 900 people) between 2019 and 2020, as a result of the economic impact of COVID-19. The data suggests that within the region job losses are likely to have occurred in retail, crop and animal production and hospitality.

Up 28th February 2021, there were 4,200 job postings with Care Workers and Home Carers, Nurses and Primary and Nursery Education Teaching occupations being the most numerous. This provides an indication of the occupations most in demand – and shows that for some roles recruitment activity is ongoing despite COVID-19 or boosted as a result of increased demand arising from the pandemic.

Job postings data highlights that employers within the region are seeking softer skills as well as technical skills. Skills such as teamworking/collaboration and customer service feature, as do job specific skills such as teaching, accounting and social services.

COVID-19 has highlighted the importance of digital skills and this could potentially benefit Scottish Borders region. The increase in the uptake of homeworking could enable more opportunities for those who live in rural areas if connectivity was strengthened. As this is an area of opportunity that could extend beyond COVID-19, this could bring a number of societal and economic benefits to the region and reduce the carbon footprint as commuting activity decreases. ‘Green jobs’ to support Scotland’s aspirations on carbon reduction are another area of opportunity.

The forecasts for the mid-term (2020-2023) suggest there will be some jobs growth and opportunities created as a result of the need to replace workers. The greatest requirement for workers is expected to be in Wholesale and Retail and Agriculture, Forestry and Fishing. Over the longer term (2023-2030) the Scottish Borders labour market is forecast to contract, with the replacement requirement expected to create opportunities. The occupations forecast to have the greatest growth due to new job creation are Caring Personal Service, Health Professionals and Managers, Proprietors in Agriculture & Services.

Over the mid and long term the greatest requirement is forecast to be for skilled workers with higher education level (SCQF 7+) qualifications. However provision at lower SCQF levels will be needed for some occupations so aligning provision not just to areas of demand, but also at appropriate qualification levels will be important.
Rebuild/ Recover

The report by the Enterprise and Skills Strategic Board sub-group on Measures to Mitigate the Labour Market Impacts from COVID-19 highlights the challenges facing Scotland’s labour market, existing measures, and identifies and assesses potential labour market options. The group identified four top priorities for action: assistance to support employee retention; assistance for those facing redundancy; training to enable unemployed people to transition into employment; and helping vulnerable people into employment.

In its Programme for Government 2020-2021, the Scottish Government outlined its plans to ensure Scotland’s economic, health and social recovery from COVID-19. Specific commitments around employability and skills support included: support for apprenticeships, a new Youth Guarantee, a National Transition Training Fund, support for those affected by redundancy through the PACE initiative and a Jobs guarantee and Fair Start Scotland fund to help those facing the greatest barriers find work.

By committing to update our RSA insight over the coming months, our aim is to support partners and stakeholders with skills planning, whatever the horizon, and support the acceleration of ‘reform in the enterprise and skills system to drive greater collaboration and alignment’.

Regional action

SDS has shared regional COVID-19 labour market insights with Borders Council, Borders College, the Borders Learning and Skills Partnership and SOSE. Discussions are underway with partners in the Scottish Borders and more widely across the South of Scotland to support targeted responses to the economic and labour market impacts of COVID. SDS has provided a focus on where there are employment opportunities; for example in the Health and Social Care, digital or green energy sectors. Discussions are underway to explore a package of labour market measures such as youth guarantee and digital literacy pathfinder to support transitions into training, education and employment. In addition, SDS has launched the My World of Work Jobs hub to highlight immediate employment opportunities, and an online learning portal to help individuals further develop their skills. PACE has been enhanced to provide greater support for those affected by redundancies and more detail on further labour market interventions is available in the Scottish Government’s Programme for Government (2020-21).

In 2020-21, SDS will work with partners to rapidly share information on potential redundancies; upscale PACE and other labour market interventions to meet the recruitment and unemployment challenges; and work closely with college partners to help align provision to labour market opportunities. SDS will also work with partners to support the development of a new Regional Economic Strategy, deliver the Regional Skills Investment Plan for the South of Scotland, and work with partners to establish a new regional Education and Skills Programme Board.
References

13. Oxford Economics 2020. £ millions, 2016 prices (figures rounded to nearest 100)
15. Disclosure control has been applied where figures are less than 5 or where such small numbers can be identified through differencing. SDS (2021) PACE management information (internal source). SDS (2021) Modern Apprenticeship Statistics. Available at: https://www.skillsdevelopmentscotland.co.uk/media/47432/modern-apprenticeship-statistics-quarter-3-2020-21.pdf
20. Percentages do not sum to 100. SDS (2020). Annual Participation Measure. Available online at: https://www.skillsdevelopmentscotland.co.uk/publications-statistics/statistics/annual-participation-measure/?page=1&statisticCategoryId=7&order=date-desc
23. All data on this page sourced from Oxford Economics, 2020. Managers / Proprietors in Agriculture and Services includes managers and proprietors in other services not just agriculture. Therefore, growth in the ‘services’ sector contributes to the overall growth.
24. All data on this page sourced from Burning Glass Technologies, 2021
25. All data on this page sourced from Burning Glass Technologies, 2021
26. All data on this page sourced from Oxford Economics, 2020. Expansion demand is the measure of an increase/ decrease in jobs, as a result of economic growth or contraction; replacement demand is the number of job openings generated through labour market churn (i.e. those who retire, move away, or change jobs). N.B. Figures are rounded to the nearest 100 and as a result totals may not equal the sum of the constituent parts. SCQF data shows the greatest share of qualifications for each occupation. There may be a requirement for other qualifications not listed here.
27. Oxford Economics 2020
28. All data on this page sourced from Oxford Economics, 2020. Expansion demand is the measure of an increase/ decrease in jobs, as a result of economic growth or contraction; replacement demand is the number of job openings generated through labour market churn (i.e. those who retire, move away, or change jobs). N.B. Figures are rounded to the nearest 100 and as a result totals may not equal the sum of the constituent parts. SCQF data shows the greatest share of qualifications for each occupation. There may be a requirement for other qualifications not listed here.
29. Oxford Economics 2020
31. Data on this page sourced from Oxford Economics, 2020 and Burning Glass Technologies, 2021
<table>
<thead>
<tr>
<th>Occupational group</th>
<th>Job description</th>
<th>Occupations within this group include:</th>
</tr>
</thead>
</table>
| Corporate Managers and Directors       | Job holders in this sub-major group formulate government policy; direct the operations of major organisations, local government, government departments and special interest organisations; organise and direct production, processing, maintenance and construction operations in industry; formulate, implement and advise on specialist functional activities within organisations; direct the operations of branches of financial institutions; organise and co-ordinate the transportation of passengers, the storage and distribution of freight, and the sale of goods; direct the operations of the emergency services, revenue and customs, the prison service and the armed forces; and co-ordinate the provision of health and social services. | • Chief Executives and Senior Officials  
• Production Managers and Directors  
• Functional Managers and Directors  
• Financial Institution Managers and Directors  
• Managers and Directors in Transport and Logistics  
• Senior Officers in Protective Services  
• Health and Social Services Managers and Directors  
• Managers and Directors in Retail and Wholesale |
| Other Managers and Proprietors          | Job holders in this sub-major group, either as employees or proprietors, manage agriculture related services; manage and co-ordinate the operations of health service general practices, residential and day care establishments and domiciliary care services; co-ordinate and direct the activities of businesses such as restaurants, hotels, entertainment establishments, sports and leisure facilities, travel and property agencies, independent shops, garages, waste disposal and environmental services, hairdressing establishments, and agencies providing services outsourced by other organisations. | • Managers and Proprietors in Agriculture Related Services  
• Managers and Proprietors in Hospitality and Leisure Services  
• Managers and Proprietors in Health and Care Services  
• Managers and Proprietors in Other Services |
| Science, Research, Engineering and Technology Professionals | Professionals in this sub-major group undertake research and consultancy activities within the physical and social sciences and in the humanities; technically supervise the development, installation and maintenance of mechanical, chemical, structural and electrical systems; advise upon and direct the technical aspects of production programmes; provide consultancy and development services in the provision and utilisation of information technology and telecommunications; direct and advise upon the conservation and protection of the environment; and direct and advise upon the research and development operations of an organisation. | • Natural and Social Science Professionals  
• Engineering Professionals  
• Information Technology and Telecommunications Professionals  
• Conservation and Environment Professionals  
• Research and Development Managers |
| Health Professionals                    | Health professionals provide medical treatments and diagnosis for people and animals, conduct research into treatment and drugs, dispense pharmaceutical compounds, provide therapeutical treatments for medical conditions, and administer nursing and midwifery care. | • Heath Professionals  
• Therapy Professionals  
• Nursing and Midwifery Professionals |
| Teaching and Educational Professionals  | Teaching and educational professionals plan, organise and undertake teaching and research activities within educational establishments; plan, organise, direct and co-ordinate the administrative work and financial resources of these establishments; and inspect and advise schools and training establishments. | • Teaching and Educational Professionals |
| Business, Media and Public Service Professionals | Jobholders in this sub-major group advise and act on behalf of clients in legal matters, preside over judicial proceedings, collect and analyse financial information, perform accounting duties, advise on business and management matters, and perform a variety of other professional occupations within the public, welfare, regulatory and voluntary sectors, and within the media. | • Legal Professionals  
• Business, Research and Administrative Professionals  
• Business and Financial Project Management Professionals  
• Architects, Town Planners and Surveyors  
• Welfare Professionals  
• Librarians and Related Professionals  
• Quality and Regulatory Professionals  
• Media Professionals |

## Appendix 1

<table>
<thead>
<tr>
<th>Occupational Group</th>
<th>Job Description</th>
<th>Occupations within this group include:</th>
</tr>
</thead>
</table>
| Science, Engineering and Technology Associate Professionals | Science, engineering and technology associate professionals perform a variety of technical support functions to scientists, technologists, engineers and architects, prepare technical drawings, undertake building inspections, provide technical support for IT operations and users. | • Science, Engineering and Production Technicians  
• Draughtspersons and Related Architectural Technicians  
• Information Technology Technicians |
| Health and Social Care Associate Professionals | Health and social care associate professionals provide a variety of technical support functions and services for health professionals in the treatment of patients to assist physical and psychological recovery, and provide social care and related community services. | • Health Associate Professionals  
• Welfare and Housing Associate Professionals |
| Protective Service Occupations | Workers in protective service occupations serve in the armed forces, the police force, fire service, prison service and perform other protective service roles. | • Protective Service Occupations |
| Culture, Media and Sports Occupations | Workers in this sub-major group create and restore artistic works; write, edit and evaluate literary material; perform in acts of entertainment; arrange and perform musical compositions; produce television, film and stage presentations; present television and radio broadcasts; operate camera, sound and lighting equipment; design commercial and industrial products; compete in sporting events for financial reward; and provide training and instruction for sporting and recreational activities. | • Artistic, Literary and Media Occupations  
• Design Occupations  
• Sports and Fitness Occupations |
| Business and Public Service Associate Professionals | Business and public service associate professionals command and control the movement of air and sea traffic; organise the administrative work of legal practices; perform specialist financial tasks; purchase goods and materials; provide technical sales advice to clients; undertake market research; arrange for the trading and leasing of property on behalf of clients; organise conferences and related events; undertake recruitment, training and industrial relations activities; promote and maintain areas of the environment; perform administrative functions in government; and undertake statutory inspections of health and safety. | • Transport Associate Professionals  
• Legal Associate Professionals  
• Business, Finance and Related Associate Professionals  
• Sales, Marketing and Related Associate Professionals  
• Public Services and Other Associate Professionals |
| Administrative Occupations | Workers in this sub-major group undertake administrative and clerical work in national and local government departments and non-governmental organisations; perform specialist clerical tasks in relation to financial records and transactions, the administration of pension and insurance policies, the storage and transportation of freight, the activities of libraries and of human resources operations; and perform other general administrative tasks. They also coordinate and oversee the day-to-day running of offices and supervise office staff. | • Administrative Occupations: Government and Related Occupations  
• Administrative Occupations: Finance  
• Administrative Occupations: Records  
• Other Administrative Occupations  
• Administrative Occupations: Office Managers and Supervisors |
<p>| Secretarial and Related Occupations | Secretarial occupations perform general secretarial, clerical and organisational duties in support of management and other workers, and provide specialist secretarial support for medical and legal activities. | • Secretarial and Related Occupations |</p>
<table>
<thead>
<tr>
<th>Occupational group</th>
<th>Job description</th>
<th>Occupations within this group include:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Skilled Agricultural and Related Trades</td>
<td>Skilled agricultural and related trades cultivate crops, raise animals and catch fish for consumption, grow plants and trees for sale, tend gardens, parks, sports pitches and other recreational areas, and maintain areas of forestry.</td>
<td>• Agricultural and Related Trades</td>
</tr>
<tr>
<td>Skilled Metal, Electrical and Electronic Trades</td>
<td>Workers in this sub-major group shape and join metal, erect and maintain metal structures and fixtures; set up and operate metal working machinery and install and repair industrial plant and machinery; assemble parts in the manufacture of metal goods; make and calibrate precision instruments; install, test and repair air conditioning systems; maintain and repair motor vehicles; and install, test and repair industrial, domestic and commercial electrical and electronic equipment.</td>
<td>• Metal Forming, Welding and Related Trades • Metal Machining, Fitting and Instrument Making Trades • Vehicle Trades • Electrical and Electronic Trades • Skilled Metal, Electrical and Electronic Trades Supervisors</td>
</tr>
<tr>
<td>Skilled Construction and Building Trades</td>
<td>Skilled construction and building trades erect steel frames, lay stone, brick and similar materials, construct and repair roofs, install heating, plumbing and ventilating systems, fit windows, doors and other fixtures, and apply coverings and decorative material to walls, floors and ceilings.</td>
<td>• Construction and Building Trades • Building Finishing Trades • Construction and Building Trades Supervisors</td>
</tr>
<tr>
<td>Textiles, Printing and Other Skilled Trades</td>
<td>Workers in this sub-major group weave fabrics, make articles of clothing, soft furnishings and leather goods, upholster vehicle interiors, set and operate printing machines, prepare meat, poultry and fish, bake bread and flour-based confectionery products, prepare food and manage catering and bar operations within hotels, restaurants and other establishments, and perform a variety of other skilled trades.</td>
<td>• Textiles and Garments Trades • Printing Trades • Food Preparation and Hospitality Trades • Other Skilled Trades</td>
</tr>
<tr>
<td>Caring Personal Service Occupations</td>
<td>Workers in this sub-major group assist health professionals in the care of patients; undertake caring personal services within the community; supervise the activities of pre-school age children and assist teachers with non-teaching duties; provide technical assistance to veterinarians and provide other services in the care of animals; provide funeral services; and control pests hazardous to public health.</td>
<td>• Childcare and Related Personal Services • Animal Care and Control Services • Caring Personal Services</td>
</tr>
<tr>
<td>Leisure, Travel and Related Personal Service Occupations</td>
<td>Workers within Leisure, Travel and Related Personal Service Occupations provide services and facilities for sporting and recreational activities; make travel arrangements for clients and provide ancillary services for travellers; provide hairdressing and beauty services; undertake domestic and care-taking duties in private households, public buildings and other establishments.</td>
<td>• Leisure and Travel Services • Hairdressers and Related Services • Housekeeping and Related Services • Cleaning and Housekeeping Managers and Supervisors</td>
</tr>
<tr>
<td>Sales Occupations</td>
<td>Workers in this sub-major group sell goods and services in retail and wholesale establishments, accept payment in respect of sales, obtain orders and collect payments for goods and services from private households, replenish stocks of goods in stores, create displays of merchandise and perform other sales related occupations.</td>
<td>• Sales Assistants and Retail Cashiers • Sales Related Occupations • Sales Supervisors</td>
</tr>
<tr>
<td>Occupational group</td>
<td>Job description</td>
<td>Occupations within this group include:</td>
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<tr>
<td>Customer Service Occupations</td>
<td>Customer service occupations receive and respond to enquiries regarding products or services, deal with customer complaints and perform a variety of tasks in the provision of additional services to customers after the point of sale; operate switchboards and receive and direct calls in a variety of establishments; operate telecommunications equipment to transmit and receive messages; conduct market research interviews; and perform other customer service tasks.</td>
<td></td>
</tr>
</tbody>
</table>
| Process, Plant and Machine Operatives    | Process, plant and machine operatives operate and attend machinery to manufacture, process or otherwise treat foodstuffs, beverages, textiles, chemicals, glass, ceramics, rubber, plastic, metal, synthetic and other products, operate plant and machinery to produce paper, wood and related products, extract coal and other minerals from the earth, attend and operate power generation and water treatment systems, perform routine operations in the manufacture of motor vehicles, metal goods, electrical and electronic products, clothing and other goods, and perform a variety of tasks in relation to the construction and repair of buildings, public highways, underground piping systems, railway tracks and other structures. | • Process Operatives  
• Plant and Machine Operatives  
• Assemblers and Routine Operatives  
• Construction Operatives |
| Transport and Mobile Machine Drivers and Operatives | Transport and mobile machine drivers and operatives drive motor vehicles to transport goods and people; drive trains and guide and monitor the movement of rail traffic; operate mechanical equipment on board boats, ships and other marine vessels; assist in the boarding, fuelling and movement of aircraft at airports; operate lifting, earth moving and earth surfacing equipment, agricultural equipment and other mobile machinery. | • Road Transport Drivers  
• Mobile Machine Drivers and Operatives  
• Other Drivers and Transport Operatives |
| Elementary Trades and Related Occupations | Occupations in this sub-major group perform agricultural, fishing and forestry related tasks, undertake general labouring duties, assist building and construction trades workers, and perform a variety of duties in foundry, engineering and other process plant related trades. | • Elementary Agricultural Occupations  
• Elementary Construction Occupations  
• Elementary Process Plant Occupations |
| Elementary Administration and Service Occupations | Workers in this sub-major group collect, sort and deliver written correspondence, undertake elementary clerical tasks within offices, undertake elementary cleaning tasks, protect and supervise people and property, perform elementary sales related tasks, assist in the storage and transportation of goods, and perform a variety of carrying, preparation and serving tasks within hospitals, catering, domestic and other establishments. | • Elementary Administration Occupations  
• Elementary Cleaning Occupations  
• Elementary Security Occupations  
• Elementary Sales Occupations  
• Elementary Storage Occupations  
• Other Elementary Services Occupations |