



**Regional Skills Assessments**  
**Edinburgh and South East City Deal**  
December 2020

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Regional Skills Assessments (RSAs) are a single, agreed evidence base created to inform investment in skills. This infographic is for Edinburgh and South East City Deal, and provides the latest Labour Market Intelligence as of December 2020. It uses a range of trusted sources to show current and future economic contribution as well as current and future skills demand. The updated [RSA Data Matrix](#) is now available, further disaggregation of Oxford Economics data will be available by the end of the year.

## 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'<sup>1</sup>. 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'<sup>2</sup>.

### 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<sup>3</sup>.

### 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<sup>4</sup>.



### Skills Shortages and Skills Gaps

In 2017, almost one quarter (22%) of all vacancies in Edinburgh, East and Midlothian were skills shortage vacancies and 17% of establishments reported at least one staff member not fully proficient in their role. Further, over one third (34%) of establishments in the region had at least one member of staff who was under-utilised.<sup>5</sup>

*\* As data for Edinburgh and South East City Deal is unavailable, Edinburgh, East and Midlothian has been used here. Data for Fife, Scottish Borders and West Lothian can be found in their RSAs.*



**Brexit is a further factor that is expected to exacerbate economic and labour market challenges**



## Edinburgh and South East City Deal Population 2018-2043



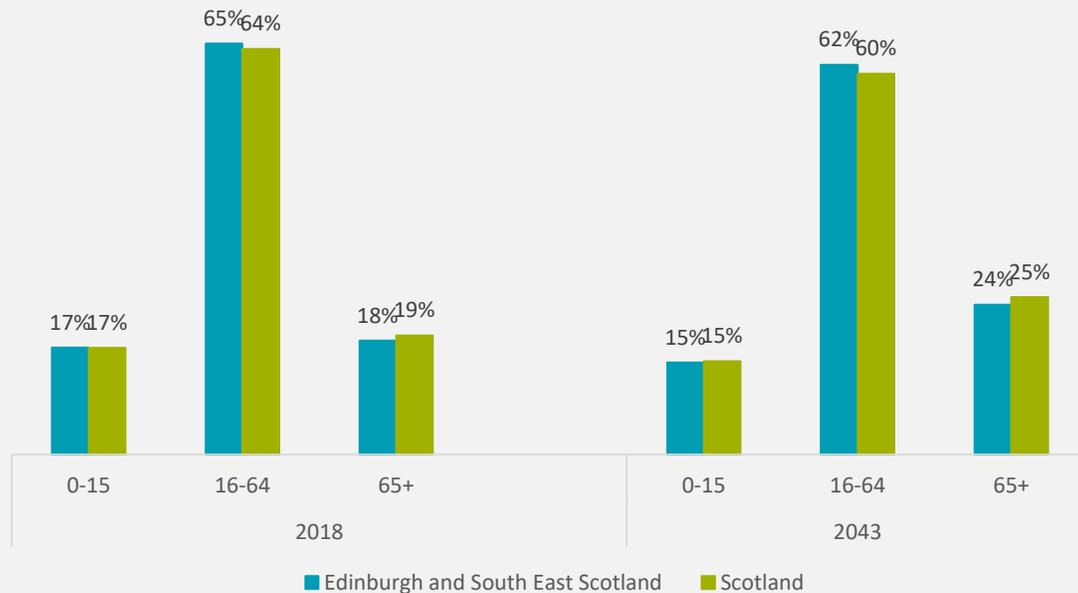
Total population 2018:  
**1,385,000**

Forecast change 2018 to 2043:  
**Edinburgh and South East City Deal:**  
**126,600, (9.1%)**  
**Scotland: 136,700, (2.5%)**  
**United Kingdom: 5,982,400 (9.0%)**

Working age population 2018:  
**898,700**

Forecast change 2018 to 2043 :  
**Edinburgh and South East City Deal: 64,300,**  
**(7.2%)**  
**Scotland: -7,300, (-0.2%)**  
**United Kingdom: 2,644,500 (6.4%)**

## Population by age (2018 and 2043) Scotland and Edinburgh and South East City Deal



## Dependency Ratio 2018 and 2043



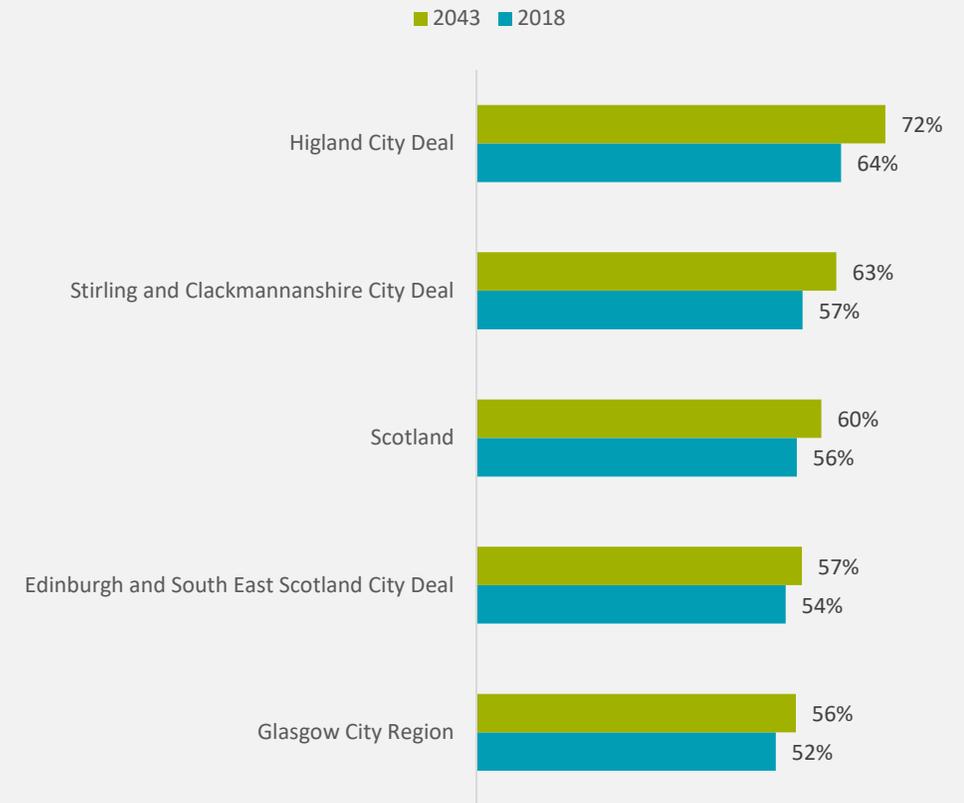
Dependency ratio for **Edinburgh and South East City Deal:**  
2018: **54%** 2043: **57%**



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 54% would mean that for every 1,000 people of working age there were 540 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.

## Dependency Ratio (2018 and 2043), by Region



## Scotland

Scottish Government scenarios prepared in June 2020 suggested that **GDP in Scotland could fall by 14 per cent in 2020. Updated scenario analysis prepared in September shows that the fall in economic output has been smaller than initially expected**, in part because some sectors proved to be more resilient than initially anticipated. The medium-term outlook expects economic activity to return to pre-crisis levels by the end of 2023.<sup>7</sup>

**In Quarter 3 (Q3) 2020, Scotland's economy grew by 16.0 per cent** as lockdown restrictions were eased.<sup>8</sup> Compared to the same quarter last year, Scotland's GDP contracted by 9.5 per cent. However, there was some growth across all industries, with the largest in Distribution, Hotels and Catering (within Services).



## The Regional Economy



### Gross Value Added (GVA)<sup>9</sup>

Total **Edinburgh and South East City Deal** GVA 2020: **£38,365m** and **30%** of total Scottish output



From 2010-2020, GVA in **Edinburgh and South East City Deal**: **increased by 7.5% or £2,676m**



Forecast average annual growth (2020-2030):  
**Edinburgh and South East City Deal: 2.4%**  
**Scotland: 2.2%**  
**United Kingdom: 2.4%**



### Productivity<sup>10</sup>

**Edinburgh and South East City Deal** productivity 2020: **£51,600**, in **Scotland** it was **£45,500**



From 2010-2020, Productivity in **Edinburgh and South East City Deal**: **decreased by 4.2% or £2,200**



Forecast average annual growth (2020-2030):  
**Edinburgh and South East City Deal: 1.8%**  
**Scotland: 1.9%**  
**United Kingdom: 2.0%**

The greatest contributing factor to each region's economic recovery will be their sectoral footprint. This will have also been a key determinant of how hard the economy was impacted by COVID-19.



## Resilience of Edinburgh and South East City Deal to COVID-19 Impacts

The Oxford Economics Vulnerability Index<sup>11</sup> 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.**

### Midlothian

**85.1**

4<sup>th</sup> most resilient local authority

Digital connectivity contributed most to the locality's vulnerability (a score of 156.7) suggesting poor broadband speeds and low rates of working from home. Midlothian's resilience came from an economic diversity score of 82.6, suggesting a lesser reliance on GVA in sectors more exposed to COVID-19. Whilst business environment (score of 40.5) also supported resilience, suggesting a lower share of small firms and self-employment.

### City of Edinburgh

**54.7**

1<sup>st</sup> most resilient local authority

Digital connectivity and economic diversity contributed to the City of Edinburgh's resilience (score of 76.8 and 77.7 respectively) suggesting good broadband speeds and high rates of working from home, along with less reliance on GVA in sectors more exposed to COVID-19. Business environment (score of 17.2) strongly supported the resilience of the locality, suggesting a lower share of small firms and self-employment.

### Fife

**101.6**

10<sup>th</sup> most resilient local authority

Digital connectivity contributed most to the locality's vulnerability (a score of 143.4) suggesting poor broadband speeds and low rates of working from home. Fife also faces vulnerability with an economic diversity score of 127.7, suggesting greater reliance on GVA in sectors more exposed to COVID-19. However, business environment (score of 47.9) supported resilience, suggesting a lower share of small firms and self-employment.

### East Lothian

**115.8**

14<sup>th</sup> most vulnerable local authority

Digital connectivity contributed most to the locality's vulnerability (a score of 145.1) suggesting poor broadband speeds and low rates of working from home. Business environment was also a factor in East Lothian's vulnerability with a score of 120.7, suggesting a greater share of small firms and self-employment. However, economic diversity (score of 91.8) contributed to the locality's resilience, suggesting lower reliance on GVA in sectors more exposed to COVID-19.

### Scottish Borders

**140.3**

3<sup>rd</sup> most vulnerable local authority

Digital connectivity and business environment contributed most to the locality's vulnerability (a score of 180.9 and 164.5 respectively) suggesting poor broadband speeds, low rates of working from home, and a greater share of small firms and self-employment. Economic diversity (score of 89.4) supported resilience suggesting less 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.”

## Business Turnover Index October 2020<sup>12</sup>

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 continued to grow for the sixth month in a row to 42.7 in October. While this indicates a further increase in business activity, the index remained significantly below pre-pandemic levels with most businesses reporting lower sales than the previous year.
- Turnover fell in all industry sectors compared to 12 months ago, except for Food Retail.

## Job Postings in Edinburgh and South East City Deal<sup>13</sup>

In Edinburgh and South East City Deal there were 24% fewer job postings in Week 48 2020 (November) compared to 2019

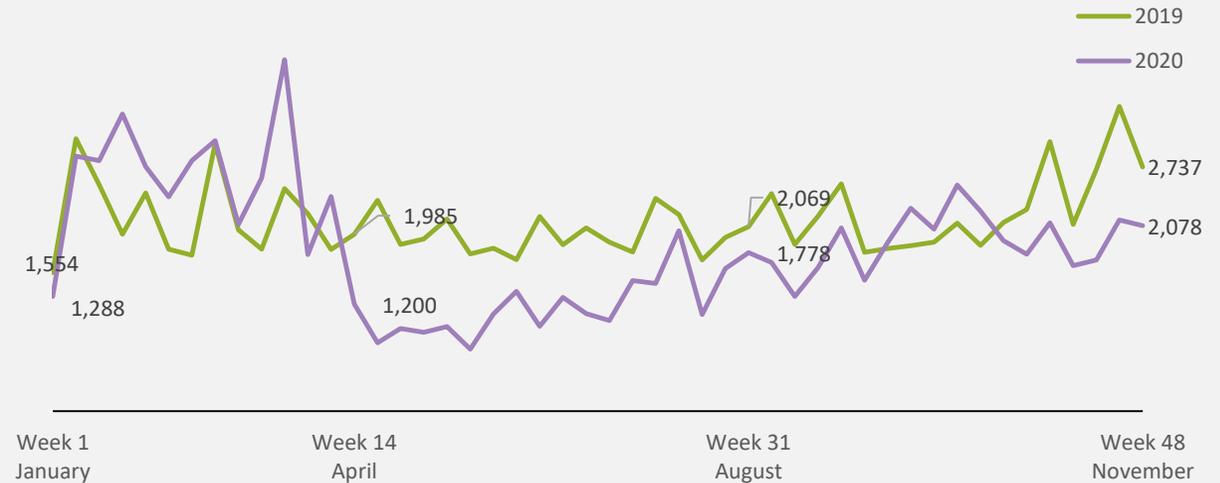
In Edinburgh and South East City Deal new postings increased by 73% between Week 14 (beginning of April) and Week 48 2020



In Scotland there were 27% fewer job postings in Week 48 2020 (November) compared to 2019

In Scotland new postings increased by 70% between Week 14 (beginning of April) and Week 48 2020

### Weekly job postings in Edinburgh and South East City Deal for 2019 and 2020



Week 1 refers to the first Saturday in January (e.g. 4th January 2020)

## Furloughed Jobs by Region

The UK Government have announced that the Coronavirus Job Retention Scheme will be extended to March 2021. The rules allow individuals made redundant before 23<sup>rd</sup> 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 redundancy<sup>14</sup>.

Number of jobs furloughed in **Edinburgh City Deal** at 31<sup>st</sup> October:

**51,600**

accounted for 26.4% of Scotland's furloughed workforce

Females: **26,100**  
Males: **25,600**

Number of jobs furloughed by local authority:

East Lothian: <b>3,800</b>	City of Edinburgh: <b>24,500</b>
Females: <b>2,100</b>	Females: <b>12,000</b>
Males: <b>1,700</b>	Males: <b>12,500</b>

Fife: <b>10,600</b>	Midlothian: <b>3,500</b>
Females: <b>5,500</b>	Females: <b>1,800</b>
Males: <b>5,200</b>	Males: <b>1,700</b>

Scottish Borders: <b>3,300</b>	West Lothian: <b>5,900</b>
Females: <b>1,800</b>	Females: <b>2,900</b>
Males: <b>1,500</b>	Males: <b>3,000</b>



Number of jobs furloughed at 31<sup>st</sup> October in Scotland:

**195,200**

Females: **100,500**  
Males: **94,700**

Fully furloughed: **110,100**  
Partially furloughed : **85,100**

## Redundancy<sup>15</sup>

**Partnership Action for Continuing Employment (PACE)** aims to help minimise the impact for people and businesses facing redundancy. Data is for April – July 2020 and April – November 2020.

PACE engagement (Individuals):  
**Edinburgh and South East City Deal:**  
Apr-Jul: **1,640** Apr-Nov: **4,815**

**Scotland:**  
Apr-Jul: **13,935** Apr-Nov: **27,570**

PACE engagement (Employers):  
**Edinburgh and South East City Deal:**  
Apr-Jul: **70** Apr-Nov: **175**

**Scotland:**  
Apr-Jul: **355** Apr-Nov: **740**

PACE engagement with individuals in **Edinburgh and South East City Deal April-November 2020** Sectors with the greatest number of redundancies for individuals:



**Accommodation and Food Services:**  
**1,650**



**Wholesale and Retail Trade:**  
**650**



**Arts, Entertainment and Recreation:**  
**485**



**Manufacturing:**  
**465**

- Data is rounded to the nearest 5
- Note there has been a correction to the dates cited since the RSA was published in December. The data relates to April-end November (rather than April-end Dec). End December data will be published at the end of the month

## Modern Apprenticeship Redundancies

MAs in training (25 September 2020):  
**Edinburgh and South East City Deal: 7,320**  
**Scotland: 33,815**

MA redundancies (25 September 2020):  
**Edinburgh and South East City Deal: 150**  
**Scotland: 540**

MA 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.



\* Data is rounded to the nearest 5



## Regional and national unemployment

COVID-19 has led to increased unemployment in **Scotland**. There were **118,000** people unemployed in Scotland aged 16+ over the period August to October 2020. Whilst this was **15,000** less than the previous three-month period (May – July 2020) there was an additional **18,000 people** unemployed compared to the same point last year (August – October 2019)<sup>16</sup>.

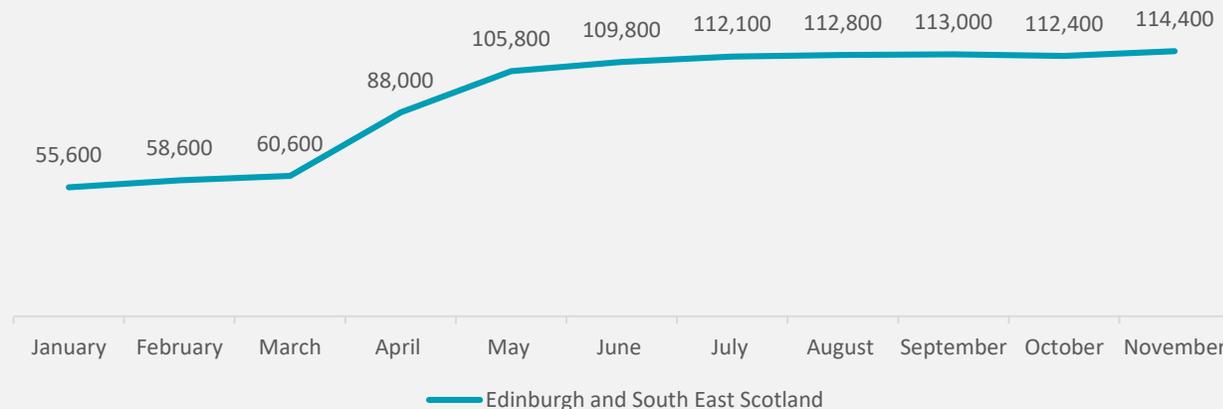
Comparable regional data is not available for August to October 2020. However, we can report unemployment data for those aged 16 and over and those aged 16-24 between July 2019 and June 2020. Data showed that the unemployment rate for the 16+ population, in **Edinburgh and South East City Deal** was lower than Scotland and youth unemployment was greater<sup>17</sup>.

Unemployment 16+ population:  
**Edinburgh and South East City Deal:**  
**22,800 (3.2%)**  
**Scotland: 90,200 (3.3%)**

Unemployment 16-24 population:  
**Edinburgh and South East City Deal: 9,100 (11.3%)**  
**Scotland: 31,900 (9.6%)**

## Edinburgh and South East City Deal Universal Credit

Data on Universal Credit claimants<sup>18</sup> 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 COVID-19.



Since March 2020, across Scotland the number of Universal Credit claimants has increased by 210,800, from 264,100 to 474,900 in November 2020 (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)<sup>19</sup>. They provide an indicative sense of scale to the possible unemployment challenges ahead (rate and number of people).

Scale of potential unemployment levels in **Edinburgh and South East City Deal**

- 8% = 57,100
- 10% = 71,400
- 12% = 85,600
- 15% = 107,000
- 20% = 142,700



Scale of potential unemployment levels in **Scotland**

- 8% = 220,000
- 10% = 275,000
- 12% = 329,900
- 15% = 412,400
- 20% = 549,900



## Annual Participation Measure<sup>20</sup>

Percentage of young adults (16-19 year old's) participating in education, training or employment.

### Percentage of 16-19 year olds Participating in 2020

**93%** of 16-19 year olds were participating in education, training or employment in Edinburgh and South East City Deal, compared to **92%** in **Scotland**:

 Education:  
**Edinburgh and South East City Deal: 71%**  
**Scotland: 72%**

 Employment:  
**Edinburgh and South East City Deal: 20%**  
**Scotland: 18%**

 Training and Development:  
**Edinburgh and South East City Deal: 2%**  
**Scotland: 2%**

### Percentage of 16-19 year olds Not- Participating in 2020

**3%** were not participating in Edinburgh and South East City Deal compared to **3%** in **Scotland**:

 Unemployed Seeking:  
**Edinburgh and South East City Deal: 1%**  
**Scotland: 1%**

 Unemployed Not-Seeking:  
**Edinburgh and South East City Deal: 2%**  
**Scotland: 2%**

### Percentage of 16-19 year olds Unconfirmed in 2020

**4%** with an unconfirmed status in Edinburgh and South East City Deal compared to **5%** in **Scotland**

### Percentage of participation in education, training or employment by Age Group



Of the total of those participating in Edinburgh and South East City Deal:



Females: **49%**



Males: **51%**

## College and University Qualifiers in Edinburgh and South East City Deal

### Successful full-time College qualifiers, 2018/19<sup>21</sup>

**Edinburgh and South East City Deal: 10,100**  
**Scotland: 48,600**

Of the successful college qualifiers in the region, **86%** went on to positive destinations and **38%** left the college sector.

### Successful University qualifiers, 2018/19<sup>22</sup>

**Edinburgh and South East City Deal: 24,600**  
**Scotland: 82,200**

15 months post-graduation, **90%** of 2017/18 undergraduate graduates from universities in the region were in employment/further study.

\* Due to small sample sizes data is unavailable for 16 and 17 year olds participating in East Lothian

## Edinburgh and South East City Deal Employment



Workforce size 2020:

**702,100 people**



The workforce is expected to shrink between 2019 and 2020, as a result of COVID-19:

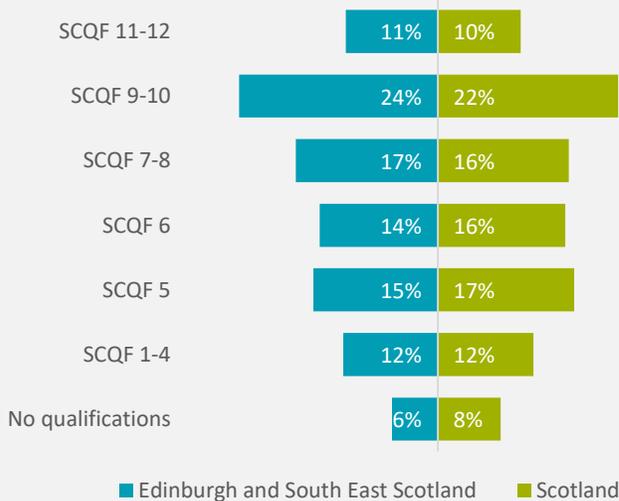
**down by 0.4% or 2,500 people**



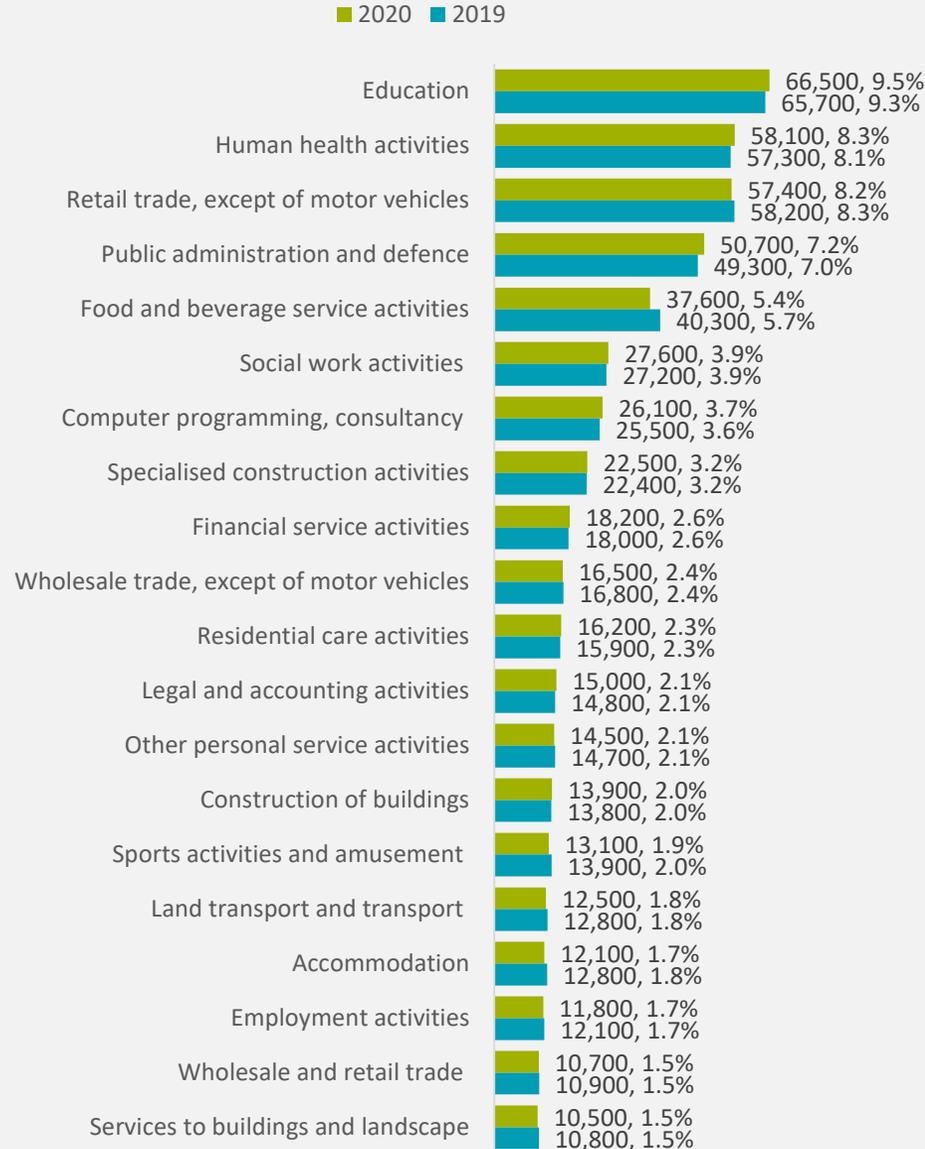
Compared to a **Scottish** decrease of **0.8% or 22,200 people**

The forecast anticipates that a greater decrease in employment will occur in the first half of the year as a result of COVID-19, with some employment growth in the second half of the year as Scotland is phased out of lockdown.

## Qualification profile, 2020



## Top Employing Industries, Edinburgh and South East City Deal, 2020



## Top Employing Occupations, Edinburgh and South East City Deal, 2020



### Job Postings 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.



### Job Postings in Scotland

Following a 68% decrease between March and April, job postings more than doubled between April and November 2020. While this indicates the return of some recruitment activity, there were around 26% fewer job postings in November compared to March 2020. This suggests employers may be taking a cautious approach to recruitment.

The composition of job postings was similar in November 2020 compared to November 2019, with the highest demand for Information and Technology professionals, Caring personal services, Nursing and Midwifery and Business Research professional roles. In November 2020, occupations with the highest number of job postings also included Road Transport Drivers and Health Professionals.



## Job Postings in Edinburgh and South East City Deal



Number of job postings up to 30<sup>th</sup> November 2020:

**96,100**

Within **Edinburgh and South East City Deal**, the locations with the most jobs advertised were:

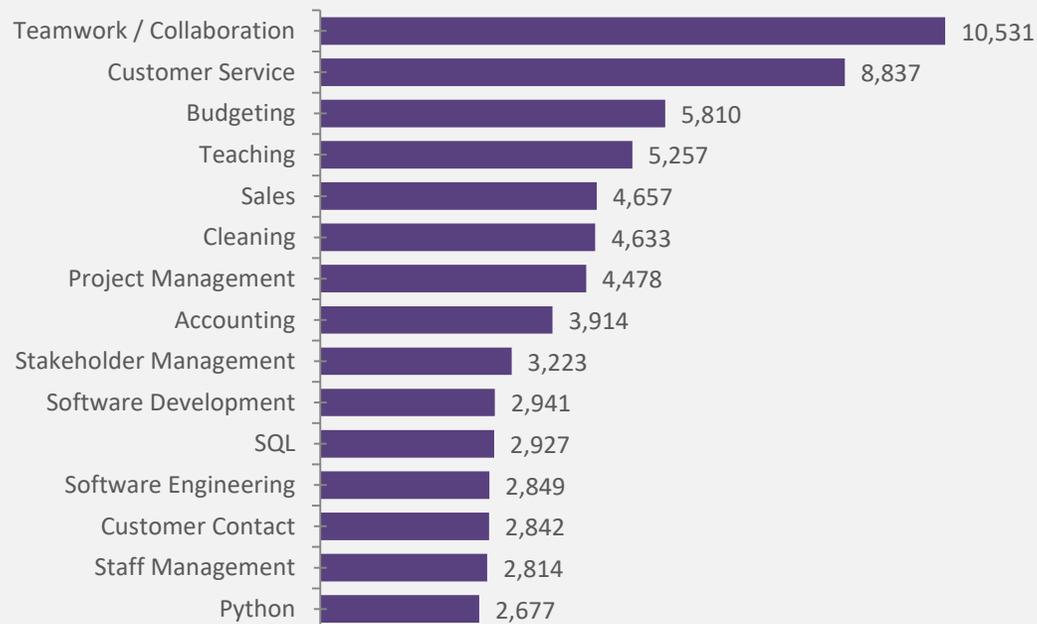
**Edinburgh**  
57,100 postings

**Livingston**  
5,200 postings

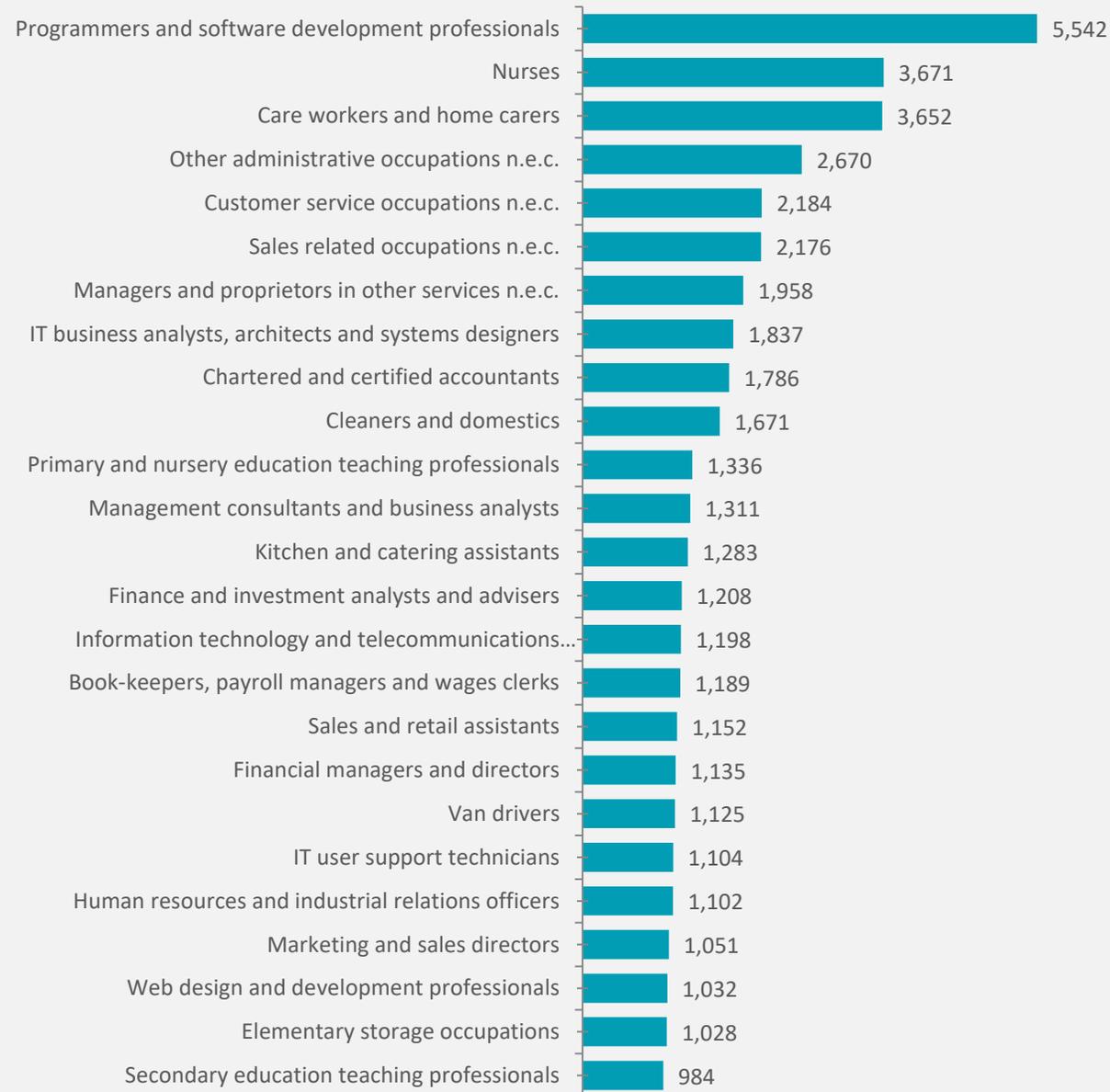
**Dunfermline**  
3,500 postings

\* Job postings data rounded to the nearest 100

Not all job postings specify the skills required for the role, likewise the detail varies between adverts. Based on information from approximately 66% of job postings in **Edinburgh and South East City Deal**, the most requested specialised skills were:



The jobs with the greatest number of postings in **Edinburgh and South East City Deal** were:



In **Edinburgh and South East City Deal**, 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 route out of lockdown. 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.

## Edinburgh and South East City Deal



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

SCQF 11-12	SCQF 7-10	SCQF 6	SCQF 5	SCQF 1-4	No quals.
7,700 (8%)	47,100 (49%)	11,800 (12%)	18,300 (19%)	4,100 (4%)	6,100 (6%)

## Scotland



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

SCQF 11-12	SCQF 7-10	SCQF 6	SCQF 5	SCQF 1-4	No quals.
23,400 (7%)	158,800 (47%)	44,200 (13%)	70,400 (21%)	15,000 (4%)	26,000 (8%)

Edinburgh and South East City Deal is forecast to account for 28% of Scotland’s total number of job openings in the mid-term (2020 – 2023)



## Edinburgh and South East City Deal Total Employment 2020-2023



Workforce size 2023:

**718,700 people**

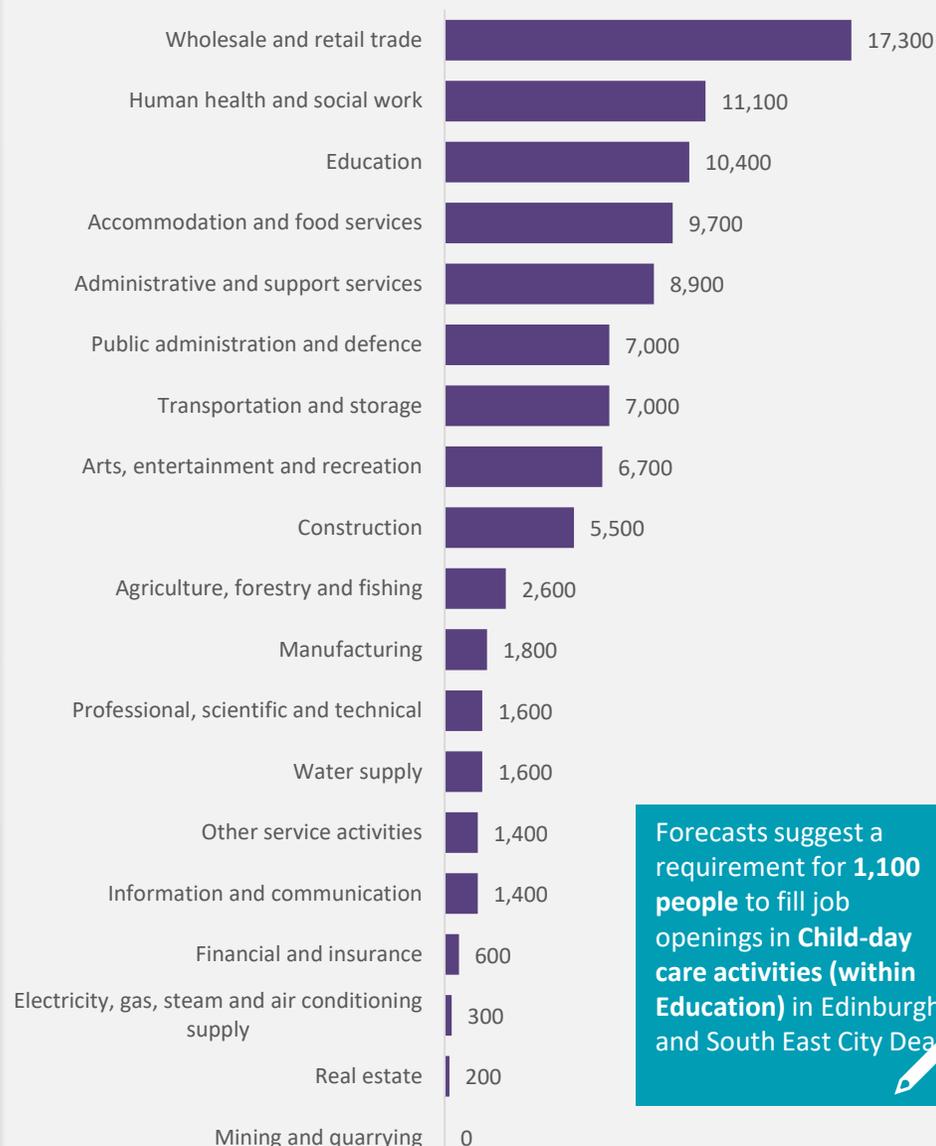
The workforce is forecast to grow between 2020 and 2023, as the labour market bounces back and growth returns:

**up by 2.4% or 16,600 people**

Compared to a **Scottish** increase of **1.5%** or **40,400 people**

Underpinning this growth is the anticipated bounce back that in Edinburgh and South East City Deal is forecast to occur between 2021 and 2022, it is not expected to be a long term growth rate.

## Total Requirement by Industry, Edinburgh and South East City Deal, 2020-2023



Forecasts suggest a requirement for **1,100 people** to fill job openings in **Child-day care activities (within Education)** in Edinburgh and South East City Deal

## Employment Growth by Occupation, Edinburgh and South East City Deal, 2020-2023



### Corporate Managers

Expansion Demand: **1,600**

Greatest requirement for qualifications: SCQF 7-10



### Business and Public Service Professionals

Expansion Demand: **1,600**

Greatest requirement for qualifications: SCQF 7-10



### Caring Personal Service Occupations

Expansion Demand: **1,500**

Greatest requirement for qualifications: SCQF 7-10



### Business and Public Service Associate Professionals

Expansion Demand: **1,200**

Greatest requirement for qualifications: SCQF 7-10



### Elementary Occupations: Clerical and Services

Expansion Demand: **1,200**

Greatest requirement for qualifications: SCQF 5



### Science and Technology Professionals

Expansion Demand: **1,000**

Greatest requirement for qualifications: SCQF 7-10



### Managers, Proprietors in Agriculture & Services

Expansion Demand: **1,000**

Greatest requirement for qualifications: SCQF 7-10



### Health Professionals

Expansion Demand: **900**

Greatest requirement for qualifications: SCQF 7-10

## Future Demand for Skills – Job Openings in the long-term (2023 - 2030)<sup>28</sup>

The forecasts for the long-term (2023-2030) highlight that strong jobs growth is not forecast to continue in **Edinburgh and South East City Deal**. 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.

### Edinburgh and South East City Deal

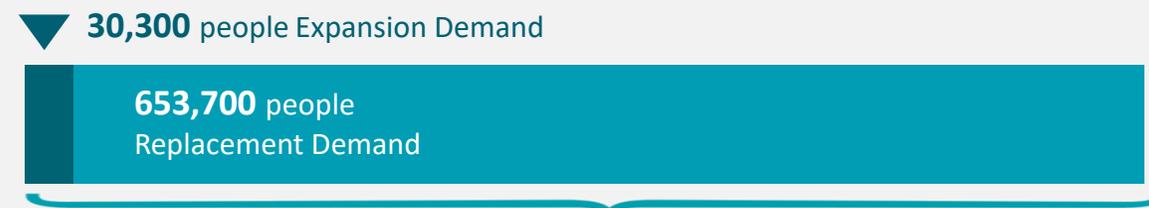


**199,400** people to fill Job Openings,

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

SCQF 11-12	SCQF 7-10	SCQF 6	SCQF 5	SCQF 1-4	No quals.
15,500 (8%)	102,100 (51%)	23,400 (12%)	41,000 (21%)	5,600 (3%)	11,900 (6%)

### Scotland



**683,900** people to fill Job Openings,

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

SCQF 11-12	SCQF 7-10	SCQF 6	SCQF 5	SCQF 1-4	No quals.
45,600 (7%)	331,900 (49%)	84,600 (12%)	153,400 (22%)	19,600 (3%)	48,800 (7%)

Edinburgh and South East City Deal is forecast to account for 29% of Scotland's total number of job openings in the long-term (2023 – 2030)



## Edinburgh and South East City Deal Total Employment 2023-2030



Workforce size 2030:

**739,100 people**

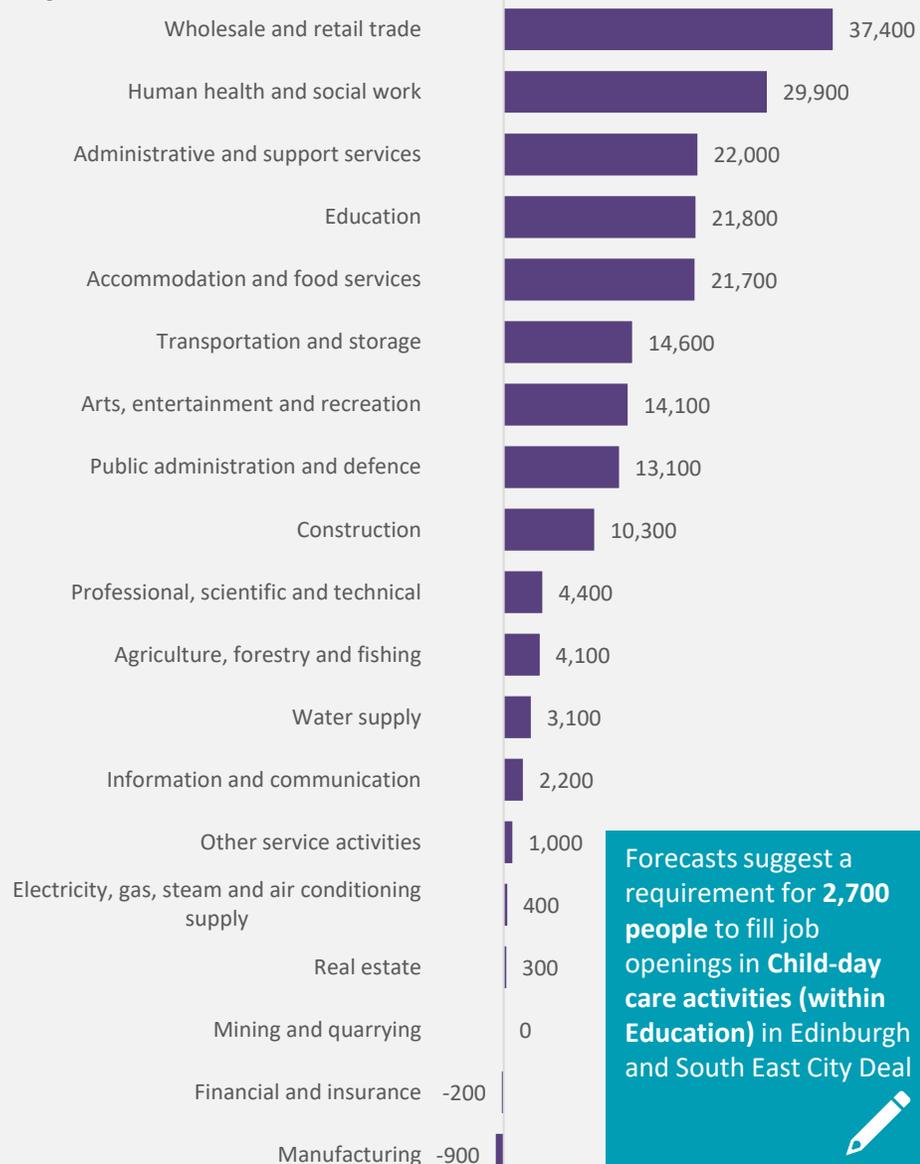
The workforce is forecast to grow between 2023 and 2030, with the growth occurring from 2024:  
**up by 2.8% or 20,400 people**

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.<sup>30</sup> 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, Edinburgh and South East City Deal, 2023-2030



Forecasts suggest a requirement for **2,700 people** to fill job openings in **Child-day care activities (within Education)** in Edinburgh and South East City Deal

## Employment Growth by Occupation, Edinburgh and South East City Deal, 2023-2030



### Caring Personal Service

Expansion Demand: **4,100**

Greatest requirement for qualifications: SCQF 7-10



### Health Professionals

Expansion Demand: **3,200**

Greatest requirement for qualifications: SCQF 7-10



### Business and Public Service Professionals

Expansion Demand: **2,900**

Greatest requirement for qualifications: SCQF 7-10



### Corporate Managers

Expansion Demand: **2,100**

Greatest requirement for qualifications: SCQF 11-12



### Business and Public Service Associate Professionals

Expansion Demand: **1,800**

Greatest requirement for qualifications: SCQF 7-10



### Science and Technology Professionals

Expansion Demand: **1,800**

Greatest requirement for qualifications: SCQF 7-10



### Managers, Proprietors in Agriculture and Services

Expansion Demand: **1,400**

Greatest requirement for qualifications: SCQF 7-10



### Culture, Media and Sports Occupations

Expansion Demand: **1,200**

Greatest requirement for qualifications: SCQF 7-10

## Spotlight on the Public Sector<sup>31</sup>

In **Edinburgh and South East City Deal**, 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), Edinburgh and South East City Deal, 2020



**Human health and social work activities: 101,800**



**Education: 66,500**



**Public administration and defence: 50,700**

The Public Sector accounted for 31% of total employment in **Edinburgh and South East City Deal** in 2020.

In **Scotland** the Public Sector accounted for 33% of total employment in 2020.

### Public Sector Job Postings

#### Edinburgh and South East City Deal

Number of Public Sector job postings up to 30<sup>th</sup> November 2020:

**26,100**



#### Scotland

Number of Public Sector job postings up to 30<sup>th</sup> November 2020:

**89,400**



### Public Sector Job Openings in Edinburgh and South East City Deal in the mid-term (2020 – 2023)

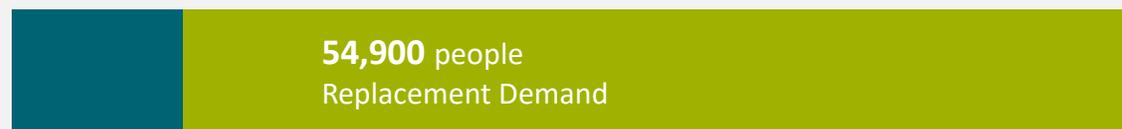
▼ **4,600** people Expansion Demand



**28,600** people to fill Job Openings

### Public Sector Job Openings in Edinburgh and South East City Deal in the long-term (2023 – 2030)

▼ **9,900** people Expansion Demand



**64,900** people to fill Job Openings

The Public Sector in **Edinburgh and South East City Deal** is forecast to account for 31% of Scotland's total number of Public Sector job openings in the long-term (2023 -2030).

\* Job postings data rounded to the nearest 100

## 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 over the coming months to support all partners and stakeholders with skills planning as we learn more about the new normal. In this release of the RSAs, Oxford Economics data has been updated to reflect the current COVID-19 impact as of November 2020. This data includes GVA, Productivity, Total Employment and Job Openings. The next update of Oxford Economics data will be in Spring 2021.



Edinburgh and South East City Deal appears to be a more resilient region, and employment growth is forecast over the mid and long term. **The workforce is expected to shrink by 0.4 per cent (or 2,500 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 and food and beverage**.



Up to 30<sup>th</sup> November 2020 there were **96,100 job postings** with **Programme and Software Developers, Nurses and Carer Workers and Home Carers** 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 teamwork/ collaboration and customer service feature, as do job specific skills such as budgeting, teaching and project management.



**COVID-19 has highlighted the importance of digital skills** and this could potentially benefit Edinburgh and South East City Deal 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 Trade** and **Human Health and Social Work**. Over the longer term (2023-2030) Edinburgh and South East City Deal labour market is forecast to continue to grow. The occupations forecast to have the greatest growth due to new job creation are **Caring Personal Service, Health Professionals** and **Business and Public Service Professionals**.



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<sup>32</sup> 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.

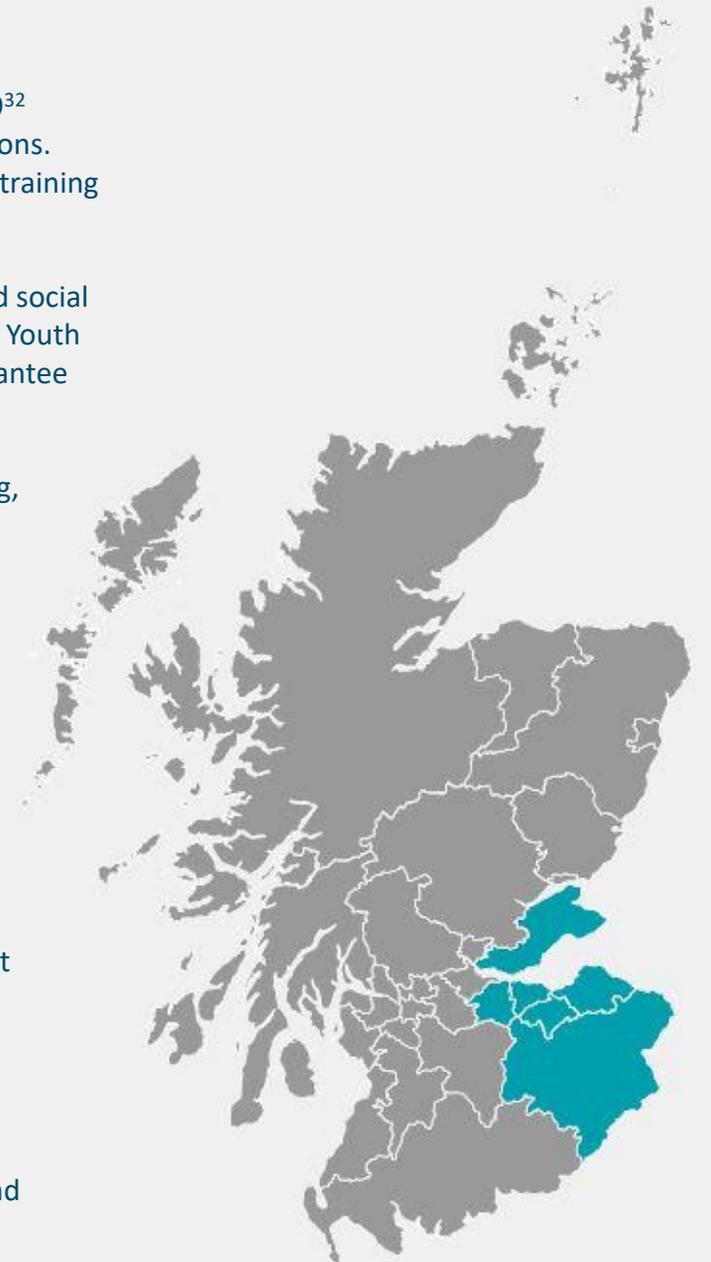
In its Programme for Government 2020-2021<sup>33</sup>, the Scottish Government outlined its plans to ensure Scotland's economic, health and social recovery from COVID-19. Specific commitments around employability and skills support included: support for apprenticeships, a new Youth Guarantee, a National 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.'*<sup>34</sup>

### Regional action

SDS has shared regional COVID-19 labour market insights with local authority partners and at Edinburgh and South East Scotland City Region Deal level. Work is underway with each local authority to support targeted responses to the economic and labour market impacts of COVID-19. 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 how the new 'Youth Guarantee' will support youth 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 set out in the Scottish Government's 'Programme for Government (2020-21)'.

In 2020-21 SDS will continue to support the Labour Market Analysis and Evaluation projects as part of the Edinburgh and South East Scotland City Region Deal. This includes the development of a Health and Social Care Skills Gateway to support progression into and through the Health and Social Care sector; and the launch of a Labour Market Toolkit to help careers advisors provide information to individuals seeking advice on career progression. Further research into the skills needs of key sectors will take place later this year, and there will be close partnership working with the regional colleges around future provision planning.



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24. All data on this page sourced from Burning Glass Technologies, 2020
25. All data on this page sourced from Burning Glass Technologies, 2020
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.
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# Appendix 1

Occupational group	Job description	Occupations within this group include:
<b>Corporate Managers and Directors</b>	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.	<ul style="list-style-type: none"> <li>• Chief Executives and Senior Officials</li> <li>• Production Managers and Directors</li> <li>• Functional Managers and Directors</li> <li>• Financial Institution Managers and Directors</li> <li>• Managers and Directors in Transport and Logistics</li> <li>• Senior Officers in Protective Services</li> <li>• Health and Social Services Managers and Directors</li> <li>• Managers and Directors in Retail and Wholesale</li> </ul>
<b>Other Managers and Proprietors</b>	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.	<ul style="list-style-type: none"> <li>• Managers and Proprietors in Agriculture Related Services</li> <li>• Managers and Proprietors in Hospitality and Leisure Services</li> <li>• Managers and Proprietors in Health and Care Services</li> <li>• Managers and Proprietors in Other Services</li> </ul>
<b>Science, Research, Engineering and Technology Professionals</b>	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.	<ul style="list-style-type: none"> <li>• Natural and Social Science Professionals</li> <li>• Engineering Professionals</li> <li>• Information Technology and Telecommunications Professionals</li> <li>• Conservation and Environment Professionals</li> <li>• Research and Development Managers</li> </ul>
<b>Health Professionals</b>	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.	<ul style="list-style-type: none"> <li>• Health Professionals</li> <li>• Therapy Professionals</li> <li>• Nursing and Midwifery Professionals</li> </ul>
<b>Teaching and Educational Professionals</b>	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.	<ul style="list-style-type: none"> <li>• Teaching and Educational Professionals</li> </ul>
<b>Business, Media and Public Service Professionals</b>	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.	<ul style="list-style-type: none"> <li>• Legal Professionals</li> <li>• Business, Research and Administrative Professionals</li> <li>• Business and Financial Project Management Professionals</li> <li>• Architects, Town Planners and Surveyors</li> <li>• Welfare Professionals</li> <li>• Librarians and Related Professionals</li> <li>• Quality and Regulatory Professionals</li> <li>• Media Professionals</li> </ul>

# Appendix 1

Occupational group	Job description	Occupations within this group include:
<b>Science, Engineering and Technology Associate Professionals</b>	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.	<ul style="list-style-type: none"> <li>• Science, Engineering and Production Technicians</li> <li>• Draughtspersons and Related Architectural Technicians</li> <li>• Information Technology Technicians</li> </ul>
<b>Health and Social Care Associate Professionals</b>	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.	<ul style="list-style-type: none"> <li>• Health Associate Professionals</li> <li>• Welfare and Housing Associate Professionals</li> </ul>
<b>Protective Service Occupations</b>	Workers in protective service occupations serve in the armed forces, the police force, fire service, prison service and perform other protective service roles.	<ul style="list-style-type: none"> <li>• Protective Service Occupations</li> </ul>
<b>Culture, Media and Sports Occupations</b>	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.	<ul style="list-style-type: none"> <li>• Artistic, Literary and Media Occupations</li> <li>• Design Occupations</li> <li>• Sports and Fitness Occupations</li> </ul>
<b>Business and Public Service Associate Professionals</b>	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.	<ul style="list-style-type: none"> <li>• Transport Associate Professionals</li> <li>• Legal Associate Professionals</li> <li>• Business, Finance and Related Associate Professionals</li> <li>• Sales, Marketing and Related Associate Professionals</li> <li>• Public Services and Other Associate Professionals</li> </ul>
<b>Administrative Occupations</b>	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.	<ul style="list-style-type: none"> <li>• Administrative Occupations: Government and Related Occupations</li> <li>• Administrative Occupations: Finance</li> <li>• Administrative Occupations: Records</li> <li>• Other Administrative Occupations</li> <li>• Administrative Occupations: Office Managers and Supervisors</li> </ul>
<b>Secretarial and Related Occupations</b>	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.	<ul style="list-style-type: none"> <li>• Secretarial and Related Occupations</li> </ul>

# Appendix 1

Occupational group	Job description	Occupations within this group include:
<b>Skilled Agricultural and Related Trades</b>	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.	<ul style="list-style-type: none"> <li>• Agricultural and Related Trades</li> </ul>
<b>Skilled Metal, Electrical and Electronic Trades</b>	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.	<ul style="list-style-type: none"> <li>• Metal Forming, Welding and Related Trades</li> <li>• Metal Machining, Fitting and Instrument Making Trades</li> <li>• Vehicle Trades</li> <li>• Electrical and Electronic Trades</li> <li>• Skilled Metal, Electrical and Electronic Trades Supervisors</li> </ul>
<b>Skilled Construction and Building Trades</b>	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.	<ul style="list-style-type: none"> <li>• Construction and Building Trades</li> <li>• Building Finishing Trades</li> <li>• Construction and Building Trades Supervisors</li> </ul>
<b>Textiles, Printing and Other Skilled Trades</b>	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.	<ul style="list-style-type: none"> <li>• Textiles and Garments Trades</li> <li>• Printing Trades</li> <li>• Food Preparation and Hospitality Trades</li> <li>• Other Skilled Trades</li> </ul>
<b>Caring Personal Service Occupations</b>	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.	<ul style="list-style-type: none"> <li>• Childcare and Related Personal Services</li> <li>• Animal Care and Control Services</li> <li>• Caring Personal Services</li> </ul>
<b>Leisure, Travel and Related Personal Service Occupations</b>	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.	<ul style="list-style-type: none"> <li>• Leisure and Travel Services</li> <li>• Hairdressers and Related Services</li> <li>• Housekeeping and Related Services</li> <li>• Cleaning and Housekeeping Managers and Supervisors</li> </ul>
<b>Sales Occupations</b>	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.	<ul style="list-style-type: none"> <li>• Sales Assistants and Retail Cashiers</li> <li>• Sales Related Occupations</li> <li>• Sales Supervisors</li> </ul>

# Appendix 1

Occupational group	Job description	Occupations within this group include:
<b>Customer Service Occupations</b>	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.	<ul style="list-style-type: none"> <li>• Customer Service Occupations</li> <li>• Customers Service Managers and Supervisors</li> </ul>
<b>Process, Plant and Machine Operatives</b>	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.	<ul style="list-style-type: none"> <li>• Process Operatives</li> <li>• Plant and Machine Operatives</li> <li>• Assemblers and Routine Operatives</li> <li>• Construction Operatives</li> </ul>
<b>Transport and Mobile Machine Drivers and Operatives</b>	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.	<ul style="list-style-type: none"> <li>• Road Transport Drivers</li> <li>• Mobile Machine Drivers and Operatives</li> <li>• Other Drivers and Transport Operatives</li> </ul>
<b>Elementary Trades and Related Occupations</b>	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.	<ul style="list-style-type: none"> <li>• Elementary Agricultural Occupations</li> <li>• Elementary Construction Occupations</li> <li>• Elementary Process Plant Occupations</li> </ul>
<b>Elementary Administration and Service Occupations</b>	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.	<ul style="list-style-type: none"> <li>• Elementary Administration Occupations</li> <li>• Elementary Cleaning Occupations</li> <li>• Elementary Security Occupations</li> <li>• Elementary Sales Occupations</li> <li>• Elementary Storage Occupations</li> <li>• Other Elementary Services Occupations</li> </ul>