

Regional Skills Assessments
Stirling and Clackmannanshire City Region
December 2020



Contents

| | |
|--|-----------|
| Introduction | 3 |
| Spotlight on Demography | 4 |
| The Impact of COVID-19 on the Economy | 5 |
| The Regional Economy | 5 |
| Resilience of Stirling and Clackmannanshire City Region to COVID-19 Impacts | 6 |
| The Impact of COVID-19 on Business | 7 |
| The Impact of COVID-19 on Business and People | 8 |
| Redundancy | 8 |
| The Impact of COVID-19 on Employment | 9 |
| Regional Unemployment Scenarios | 9 |
| Participation in Education, Training and Employment | 10 |
| Current Demand for Skills | 11 |
| Current Job Postings | 13 |
| Future Demand for Skills | 14 |
| Spotlight on Public Sector | 18 |
| Opportunities for Recovery | 19 |



Regional Skills Assessments (RSAs) are a single, agreed evidence base created to inform investment in skills. This infographic is for the Stirling and Clackmannanshire City Region, 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'¹. 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'².

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 automation³.

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 sustainability⁴.



Skills Shortages and Skills Gaps

In 2017, almost one quarter (24%) of all vacancies in the Stirling and Clackmannanshire City Region were skills shortage vacancies and 16% 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.⁵



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



Stirling and Clackmannanshire City Region Population 2018-2043



Total population 2018:
145,700

Forecast change 2018 to 2043:
Stirling and Clackmannanshire City Region:
8,500, (5.8%)
Scotland: 136,700, (2.5%)
United Kingdom: 5,982,400 (9.0%)

Working age population 2018:
92,800

Forecast change 2018 to 2043 :
Stirling and Clackmannanshire City Region:
1,800, (2.0%)
Scotland: -7,300, (-0.2%)
United Kingdom: 2,644,500 (6.4%)

Population by age (2018 and 2043) Scotland and Stirling and Clackmannanshire City Region



Dependency Ratio 2018 and 2043



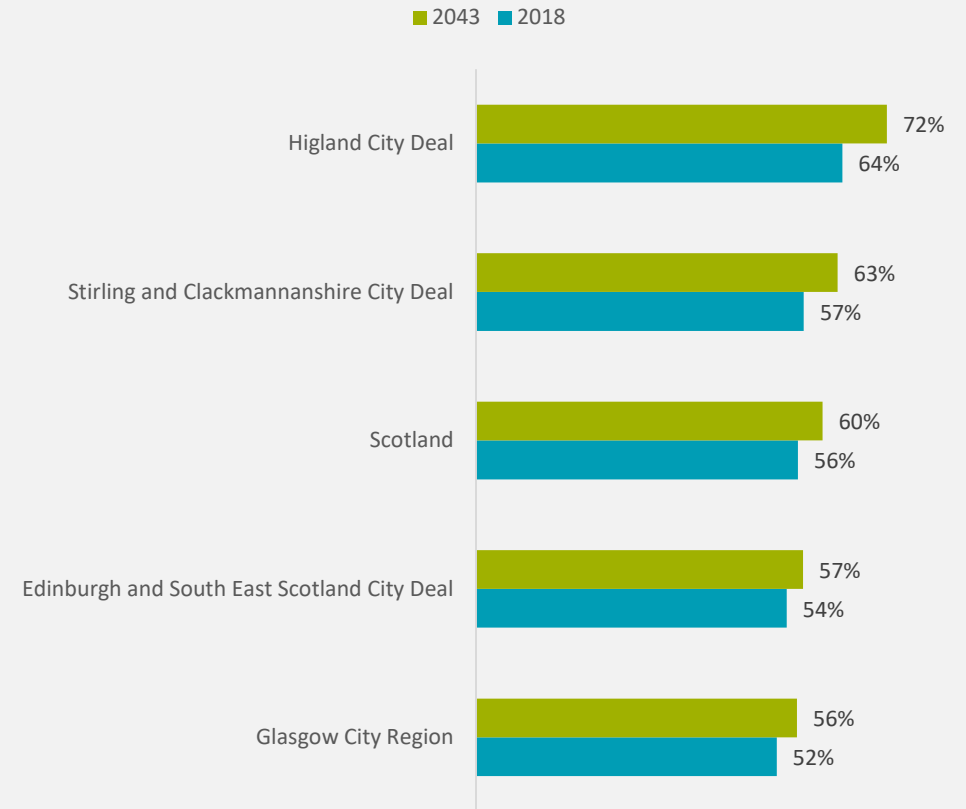
Dependency ratio for **Stirling and Clackmannanshire City Region:**
2018: **57%** 2043: **63%**



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 57% would mean that for every 1,000 people of working age there were 570 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 2023.⁷

In Quarter 3 (Q3) 2020, Scotland's economy grew by 16.0 per cent as lockdown restrictions were eased.⁸ 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)⁹

Total **Stirling and Clackmannanshire City Region** GVA 2020: **£3,304m** and **3%** of total Scottish output



From 2010-2020, GVA in **Stirling and Clackmannanshire City Region**: **decreased by 4.6% or £159m**



Forecast average annual growth (2020-2030):
Stirling and Clackmannanshire City Region: 2.2%
Scotland: 2.2%
United Kingdom: 2.4%



Productivity¹⁰

Stirling and Clackmannanshire City Region productivity 2020: **£46,900**, in **Scotland** it was **£45,500**



From 2010-2020, Productivity in **Stirling and Clackmannanshire City Region**: **decreased by 8.0% or £4,100**



Forecast average annual growth (2020-2030):
Stirling and Clackmannanshire City Region: 2.0%
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 Stirling and Clackmannanshire City Region to COVID-19 Impacts

The Oxford Economics Vulnerability Index¹¹ 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.

Stirling
105.4

16th most resilient local authority

Business environment played a part in the locality's resilience with a score of 63.7 suggesting a smaller share of small firms and self-employment. However, digital connectivity contributed most to the locality's vulnerability (a score of 163.8) suggesting poor broadband speeds and low rates of working from home. Economic diversity also contributed to Stirling's vulnerability with a score of 108.8, suggesting higher reliance on GVA in sectors more exposed to Covid-19.

Clackmannanshire

93.3

7th most resilient local authority

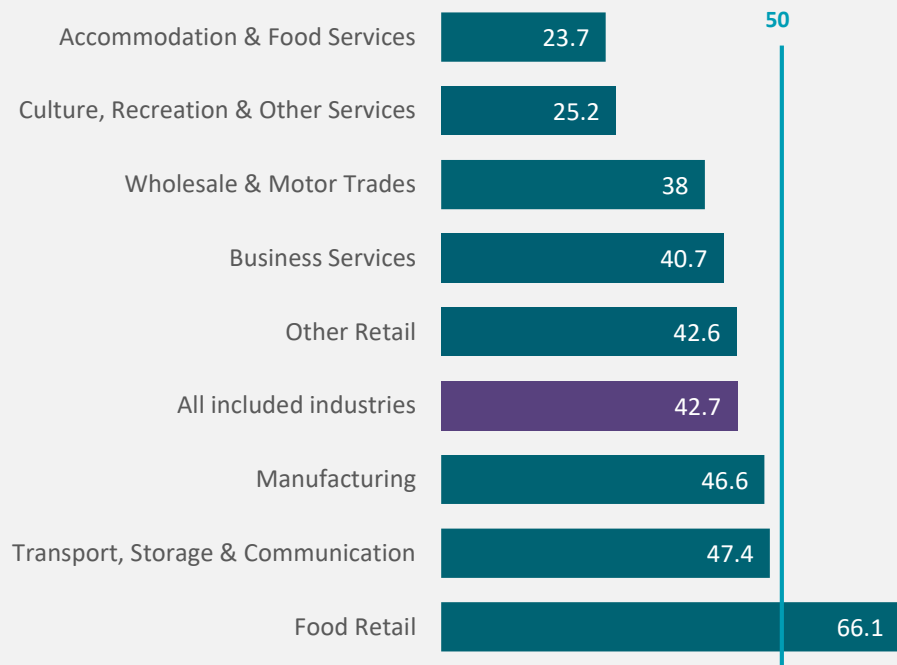
Business environment (score of 90.8) and economic diversity (88.9) contributed most to Clackmannanshire's reliability, suggesting a lower share of small firms and self-employment, and less reliance on GVA in sectors more exposed to Covid-19. However, digital connectivity contributed to the locality's vulnerability (with a score of 103.8) suggesting low working from home rates and broadband speeds. However,

"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 2020¹²

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 Stirling and Clackmannanshire City Region

13

In Stirling and Clackmannanshire City Region there were 20% fewer job postings in Week 48 2020 (November) compared to 2019

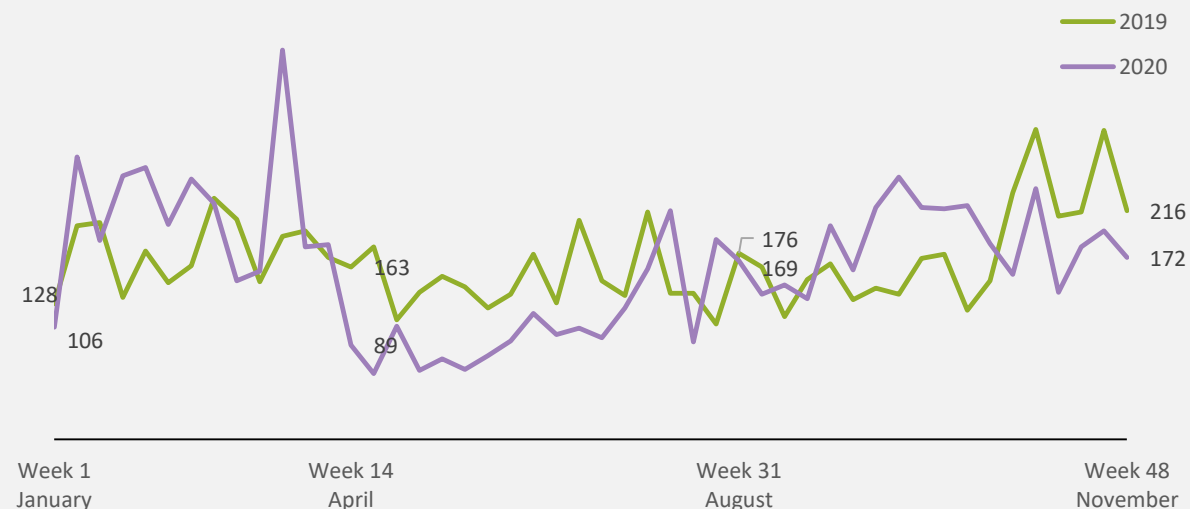
In Scotland there were 27% fewer job postings in Week 48 2020 (November) compared to 2019

In Stirling and Clackmannanshire City Region new postings increased by 93% between Week 14 (beginning of April) and Week 48 2020

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



Weekly job postings in Stirling and Clackmannanshire City Region 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 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 **Stirling and Clackmannanshire City Deal** at 31st October:

4,900

accounted for **2.5%** of Scotland's furloughed workforce

Females: **2,600**
Males: **2,300**

Number of jobs furloughed by local authority:

Clackmannanshire: **1,500**
Females: **800** Males: **700**

Stirling: **3,400**
Females: **1,800** Males: **1,600**



Number of jobs furloughed at 31st October in Scotland:

195,200

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

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

Redundancy¹⁵

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):

Stirling and Clackmannanshire City Region:
Apr-Jul: **650** Apr-Nov: **745**

Scotland:

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

PACE engagement (Employers):

Stirling and Clackmannanshire City Region:
Apr-Jul: **15** Apr-Nov: **20**

Scotland:

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

PACE engagement with individuals in **Stirling and Clackmannanshire City Region April-November 2020** Sectors with the greatest number of redundancies for individuals:



Manufacturing:
345



Accommodation and Food Services:
200



Construction:
105



Wholesale and Retail Trade:
85

- 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

MA in training (25 September 2020):

Stirling and Clackmannanshire City Region: 950

Scotland: 33,815

MA redundancies (25 September 2020):

Stirling and Clackmannanshire City Region*:

Less than 10

Scotland: 540

* Data is rounded to the nearest 5

* Stirling and Clackmannanshire City Region MA redundancy figure does not include Stirling as this data is suppressed

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 **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)¹⁶.

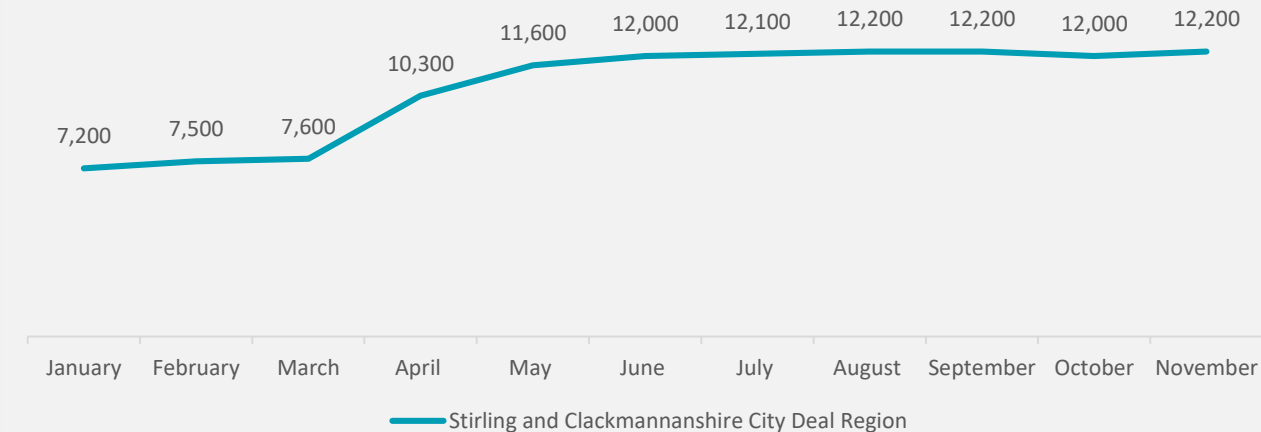
Comparable regional data is not available for August to October 2020. However, we can report unemployment data for those aged 16 and over and those aged 16-24 between July 2019 and June 2020. Data showed that the unemployment rate for the 16+ population, in **Stirling and Clackmannanshire City Region** was lower than Scotland. Youth employment rate for **Stirling and Clackmannanshire City Region** is not available¹⁷.

Unemployment 16+ population:
Stirling and Clackmannanshire City Region: 1,600 (2.2%)
Scotland: 90,200 (3.3%)

Unemployment 16-24 population:
Stirling and Clackmannanshire City Region: Data is unavailable
Scotland: 31,900 (9.6%)

Stirling and Clackmannanshire City Region Universal Credit

Data on Universal Credit claimants¹⁸ 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)¹⁹. They provide an indicative sense of scale to the possible unemployment challenges ahead (rate and number of people).

Scale of potential unemployment levels in the **Stirling and Clackmannanshire City Region**



8% = 5,600
 10% = 7,100
 12% = 8,500
 15% = 10,600
 20% = 14,100

Scale of potential unemployment levels in **Scotland**



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

Annual Participation Measure²⁰

Percentage of young adults (16-19 year olds) 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 the **Stirling and Clackmannanshire City Region**, compared to **92%** in **Scotland**:



Education:
Stirling and Clackmannanshire City Region: 72%
Scotland: 72%



Employment:
Stirling and Clackmannanshire City Region: 19%
Scotland: 18%



Training and Development:
Stirling and Clackmannanshire City Region: 2%
Scotland: 2%

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

3% were not participating in the **Stirling and Clackmannanshire City Region** compared to **3%** in **Scotland**:



Unemployed Seeking:
Stirling and Clackmannanshire City Region: 2%
Scotland: 1%

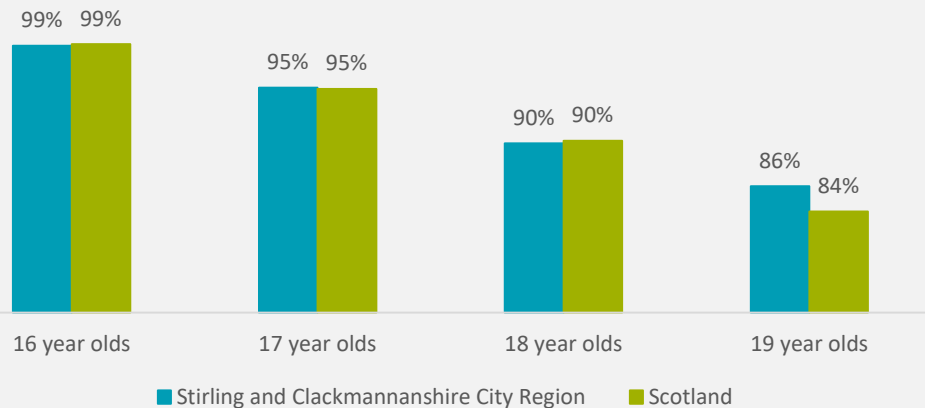


Unemployed Not-Seeking:
Stirling and Clackmannanshire City Region: 2%
Scotland: 2%

Percentage of 16-19 year olds Unconfirmed in 2020

4% with an unconfirmed status in the **Stirling and Clackmannanshire City Region** compared to **5%** in **Scotland**

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



Of the total of those participating in the **Stirling and Clackmannanshire City Region**:



Females: **48%**



Males: **52%**

College and University Qualifiers in Stirling and Clackmannanshire City Region

Successful full-time College qualifiers, 2018/19²¹

Stirling and Clackmannanshire City Region*: 1,600
Scotland: 48,600

Of the successful college qualifiers in the region, **89%** went on to positive destinations and **41%** left the college sector.

* This data is for Forth Valley College so will also include campuses in Falkirk

Successful University qualifiers, 2018/19²²

Stirling and Clackmannanshire City Region: 3,540
Scotland: 82,200

15 months post-graduation, **92%** of 2017/18 undergraduate graduates from universities in the region were in employment/further study.

Stirling and Clackmannanshire City Region Employment



Workforce size 2020:

53,100 people



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

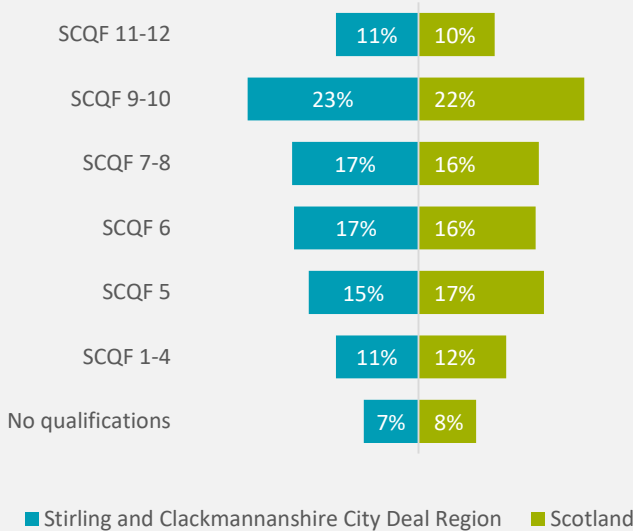
down by 1.3% or 700 people



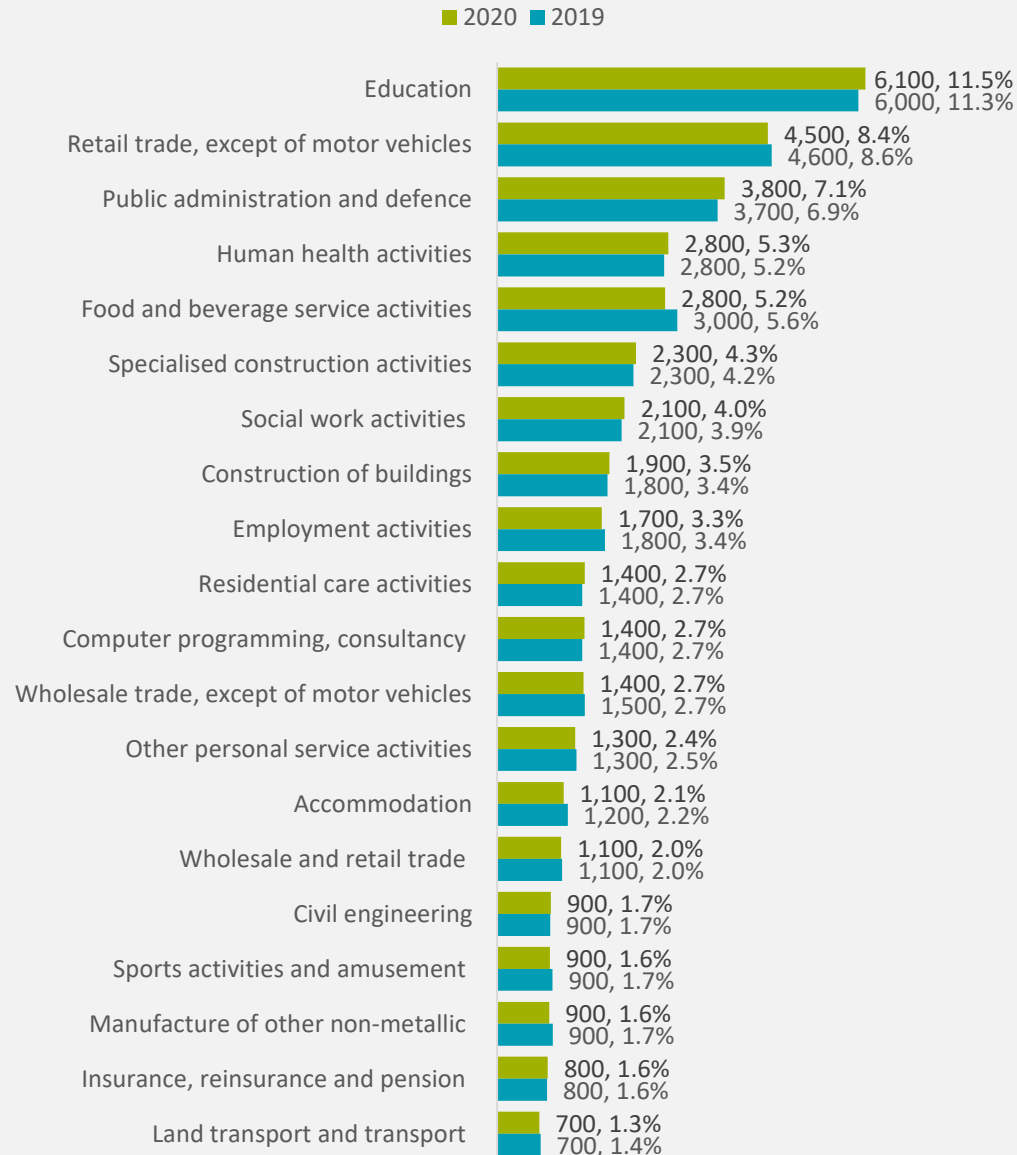
Compared to a **Scottish** decrease of **0.8% or 22,200 people**

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, Stirling and Clackmannanshire City Region, 2020



Top Employing Occupations, Stirling and Clackmannanshire City Region, 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 Stirling and Clackmannanshire City Region



Number of job postings up to 30th November 2020:

8,000

Within **Stirling and Clackmannanshire City Region**, the locations with the most jobs advertised were:

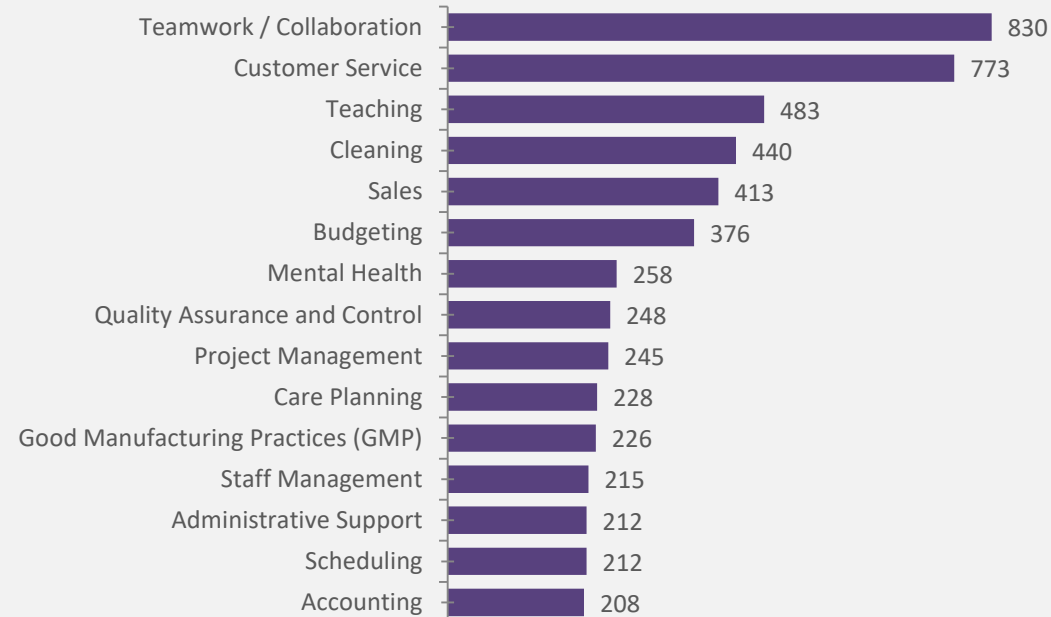
Stirling
5,900 postings

Alloa
1,000 postings

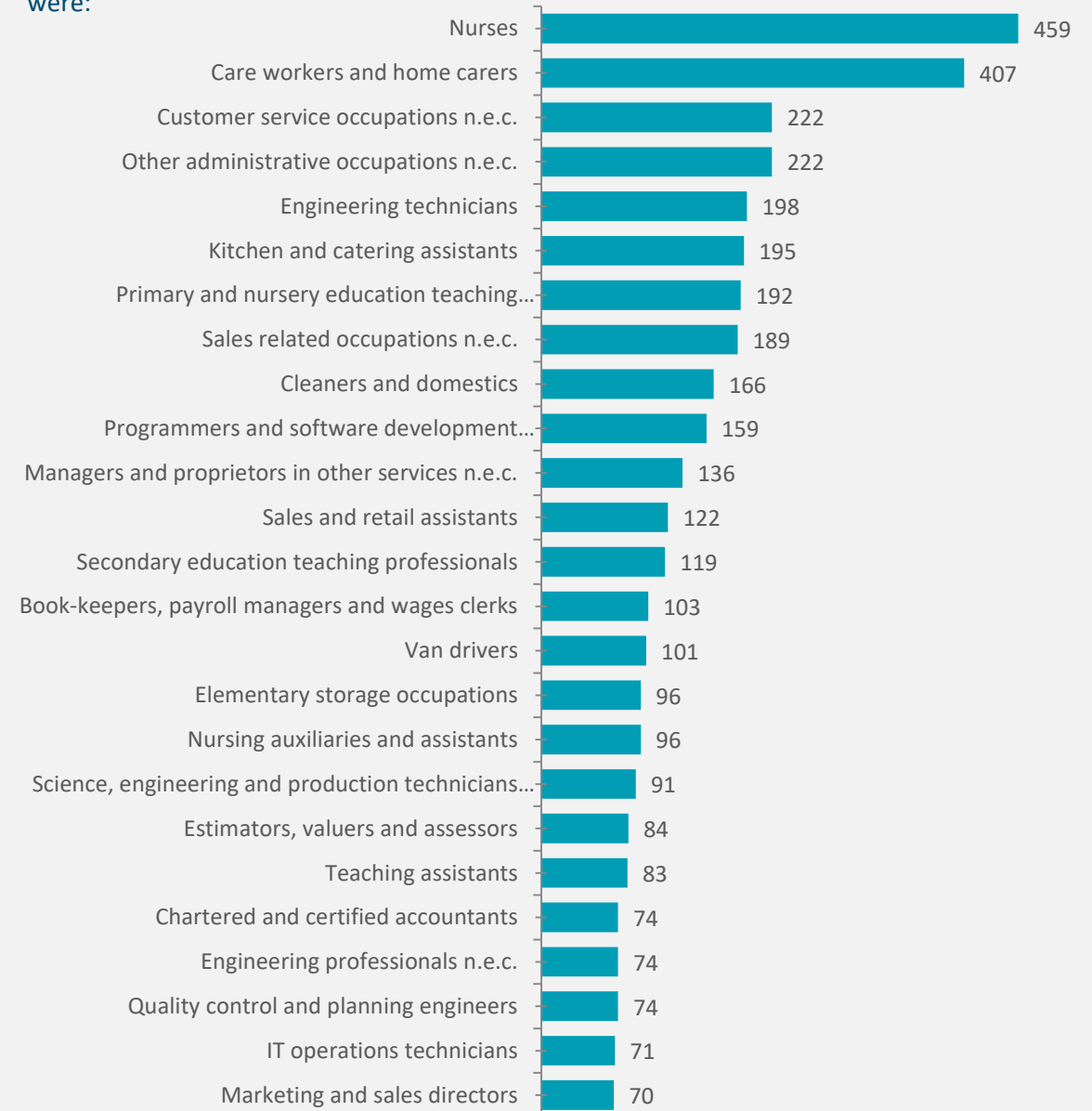
Dunblane
200 postings

* 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 60% of job postings in **Stirling and Clackmannanshire City Region**, the most requested specialised skills were:



The jobs with the greatest number of postings in **Stirling and Clackmannanshire City Region** were:



In **Stirling and Clackmannanshire City Region**, 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.

Stirling and Clackmannanshire City Region



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. |
|-------------|----------------|----------------|----------------|-------------|-------------|
| 400 (6%) | 2,900 (45%) | 1,000 (15%) | 1,400 (23%) | 300 (4%) | 500 (7%) |

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%) |

Stirling and Clackmannanshire City Region is forecast to account for 2% of Scotland’s total number of job openings in the mid-term (2020 – 2023)



Stirling and Clackmannanshire City Region Total Employment 2020-2023



Workforce size 2023:
54,000 people

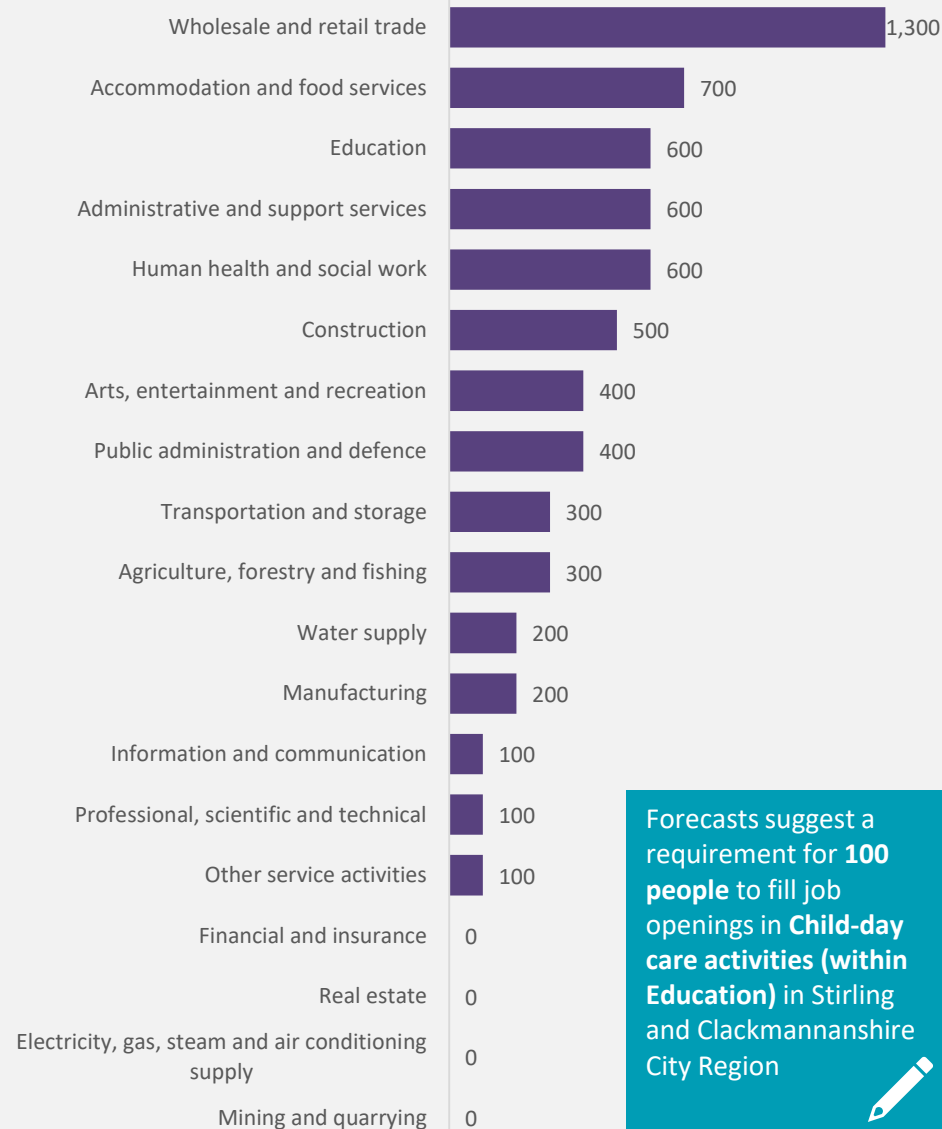
The workforce is forecast to grow between 2020 and 2023, as the labour market bounces back and growth returns:
up by 1.7% or 900 people

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

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



Total Requirement by Industry, Stirling and Clackmannanshire City Region, 2020-2023



Forecasts suggest a requirement for **100 people** to fill job openings in **Child-day care activities (within Education)** in Stirling and Clackmannanshire City Region

Employment Growth by Occupation, Stirling and Clackmannanshire City Region, 2020-2023



Corporate Managers
Expansion Demand: **100**
Greatest requirement for qualifications: SCQF 11-12



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



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



Elementary Occupations: Clerical and Services
Expansion Demand: **100**
Greatest requirement for qualifications: SCQF 5



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



Skilled Agricultural Trades
Expansion Demand: **100**
Greatest requirement for qualifications: No qualifications



Science and Technology Professionals
Expansion Demand: **100**
Greatest requirement for qualifications: SCQF 7-10

Future Demand for Skills – Job Openings in the long-term (2023 - 2030)²⁸

The forecasts for the long-term (2023-2030) highlight that strong jobs growth is not forecast to continue in **Stirling and Clackmannanshire City Region**. 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.

Stirling and Clackmannanshire City Region

▼ **600** people Expansion Demand

10,700 people
Replacement Demand

11,200 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. |
|-------------|----------------|----------------|----------------|-------------|-------------|
| 800 (7%) | 5,200 (46%) | 1,600 (14%) | 2,800 (25%) | 200 (2%) | 700 (6%) |

Scotland

▼ **30,300** people Expansion Demand

653,700 people
Replacement Demand

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%) |

Stirling and Clackmannanshire City Region is forecast to account for 2% of Scotland's total number of job openings in the long-term (2023 – 2030)



Stirling and Clackmannanshire City Region Total Employment 2023-2030



Workforce size 2030:

54,500 people



The workforce is forecast to grow between 2023 and 2030, with the growth occurring from 2024: **up by 1.1% or 600 people**

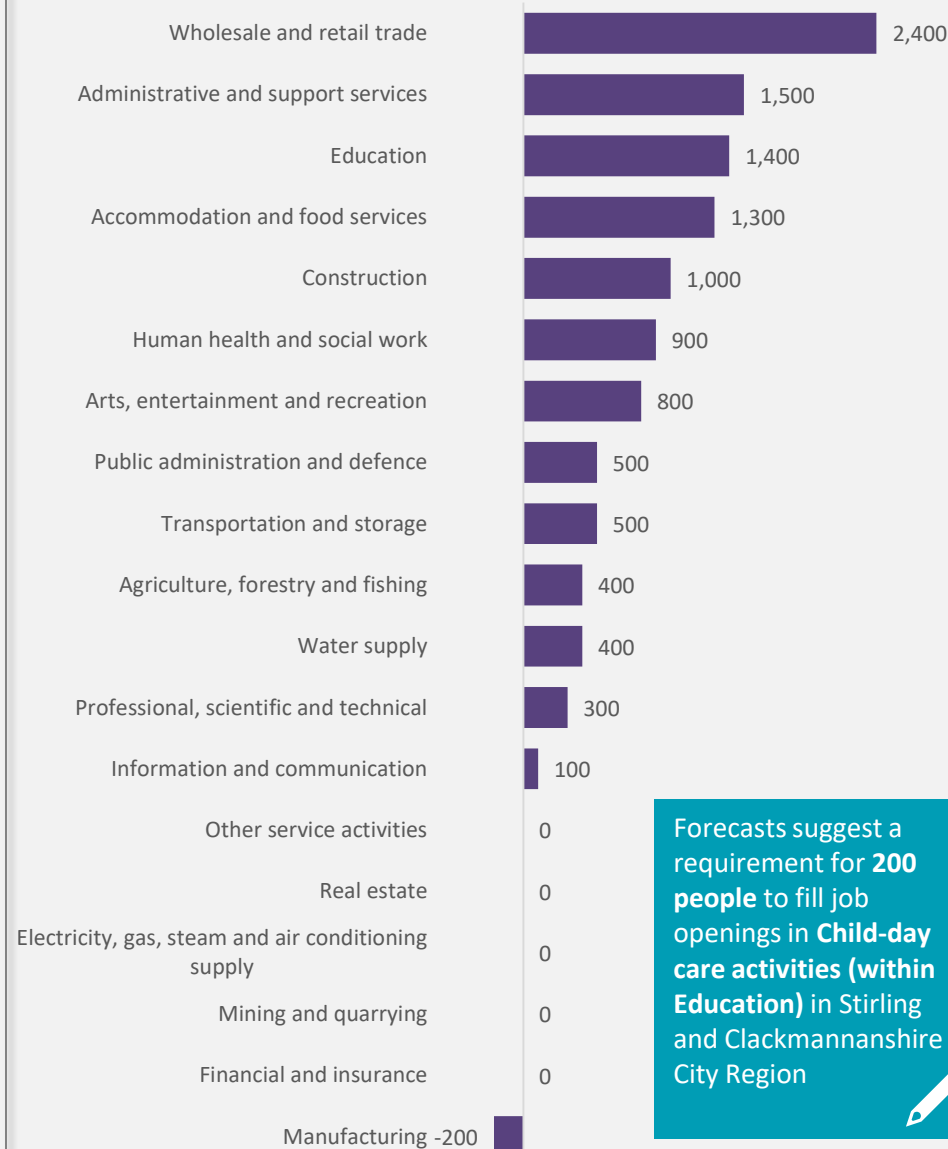


Compared to a **Scottish** increase of **1.1% or 30,300 people**

The economic impacts of COVID-19 are not being felt equally by all groups in society.³⁰ 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, Stirling and Clackmannanshire City Region, 2023-2030



Forecasts suggest a requirement for **200 people** to fill job openings in **Child-day care activities (within Education)** in Stirling and Clackmannanshire City Region

Employment Growth by Occupation, Stirling and Clackmannanshire City Region, 2023-2030



Business and Public Service Professionals

Expansion Demand: **200**

Greatest requirement for qualifications: SCQF 7-10



Caring Personal Service Occupations

Expansion Demand: **200**

Greatest requirement for qualifications: No qualifications



Corporate Managers

Expansion Demand: **100**

Greatest requirement for qualifications: SCQF 11-12



Business and Public Service Associate Professionals

Expansion Demand: **100**

Greatest requirement for qualifications: SCQF 7-10



Science and Technology Professionals

Expansion Demand: **100**

Greatest requirement for qualifications: SCQF 11-12



Elementary Occupations: Clerical and Services

Expansion Demand: **100**

Greatest requirement for qualifications: SCQF 5



Culture, Media and Sports Occupations

Expansion Demand: **100**

Greatest requirement for qualifications: SCQF 7-10

In the **Stirling and Clackmannanshire City Region**, 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), Stirling and Clackmannanshire City Region, 2020



Human health and social work activities: 6,400



Education: 6,100



Public administration and defence: 3,800

The Public Sector accounted for 31% of total employment in **Stirling and Clackmannanshire City Region** in 2020.

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



Public Sector Job Postings

Stirling and Clackmannanshire City Region

Number of Public Sector job postings up to 30th November 2020:

2,200



Scotland

Number of Public Sector job postings up to 30th November 2020:

89,400



Public Sector Job Openings in Stirling and Clackmannanshire City Region in the mid-term (2020 – 2023)

▼ 0 people Expansion Demand

1,600 people
Replacement Demand

1,600 people to fill Job Openings

Public Sector Job Openings in Stirling and Clackmannanshire City Region in the mid-term (2023 – 2030)

▼ 100 people Expansion Demand

3,000 people
Replacement Demand

2,800 people to fill Job Openings

The Public Sector in the **Stirling and Clackmannanshire City Region** is forecast to account for 1% 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.



The Stirling and Clackmannanshire City Region 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 1.3 per cent (or 700 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, hospitality and employment activities.**



Up to 30th November 2020, there were **8,000 job postings** with **Nurses, Care Workers and Home Carers** and **Customer Service 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 teamwork/collaboration and customer service feature, as do job specific skills such as teaching, budgeting and mental health.



COVID-19 has highlighted the importance of digital skills and this could potentially benefit the Stirling and Clackmannanshire City 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 **Accommodation and Food Services**, reflecting the narrative that the **Tourism sector is likely to bounce back.** Over the longer term (2023-2030) Stirling and Clackmannanshire City Region labour market will continue to grow. The occupations forecast to have the greatest growth due to new job creation are **Business and Public Service Professionals**, **Caring and Personal Service Occupations** and **Corporate Management.**



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-19³² 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 2020-2021³³, 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.'*³⁴



Regional action

SDS has shared COVID-19 labour market insights with regional partners. These can support targeted responses to facilitate recovery and renewal for example through providing a focus on identified employment opportunities such as those in the Health and Social Care, Digital and Green energy sectors.

Forth Valley College and SDS are working intensively together to look at their collaborative approach to responding to the current employment crisis.

Local authority partners are working together to develop a Regional Economic Strategy. Skills will be a critical strand to support recovery and renewal in the region and to facilitate delivery of the region's inclusive growth, productive people and place and net zero ambitions. Work is also underway on a Regional Spatial Strategy and a Regional Transport Strategy. SDS will support partners in the development of a Regional Skills Strategy and in the context of the establishment of a Regional Economic Partnership structure as these progress.

The Stirling and Clackmannanshire City Deal is being developed and delivered in collaboration with regional partners and seeks to deliver inclusive economic growth across the region. The £214m investment package focuses on delivering national and international sustainability through cutting edge environmental projects, innovation in the digital and tourism sectors and boosting skills across the region to create a pathway for future success and resilience. SDS is working closely with the Stirling and Clackmannanshire City Deal partners to realise the maximum benefits from the Deal.

The My World of Work Jobs hub highlighting immediate employment opportunities, and the SDS online learning portal are available to help individuals further develop their skills. PACE has been enhanced to provide greater support for those affected by redundancies. More detail on further labour market interventions will be available in the coming weeks.

References

1. Scottish Government (2017). Inclusive growth: First Minister’s speech. Available online at: <https://www.gov.scot/publications/inclusivegrowth-first-ministers-speech/>
2. Scottish Government (2015). Scotland’s Economic Strategy. Available online at: <https://www.gov.scot/publications/scotlands-economicstrategy/>
3. IPPR (2018). Preparing for Automation and Ageing. Available online at: <https://www.ippr.org/files/2018-09/scotland-fetl2-september18.pdf?platform=hootsuite>
4. UNEP, ILO, IOE, ITUC (2008), Green Jobs – Towards Decent Work in a Sustainable, Low-Carbon World. Available online at: https://www.ilo.org/global/topics/green-jobs/publications/WCMS_158727/lang--en/index.htm
5. Department for Education (2018) Employer Skills Survey 2017: Scotland toolkit. Available at: <https://www.gov.uk/government/publications/employer-skills-survey-2017-scotland-toolkit>
6. NRS Scotland (2020). Population Projections for Scottish Areas (2018-based). Data rounded to nearest 100. Available online at: <https://www.nrscotland.gov.uk/statistics-and-data/statistics/statistics-by-theme/population/population-projections>
7. Scottish Government (2020). State of the Economy: April 2020. Available online at: <https://www.gov.scot/publications/state-economy-april-2020/> and State of the Economy: September 2020. Available online at <https://www.gov.scot/publications/state-economy/>
8. Scottish Government (2020). First estimate of GDP: 2020 Q3. Available online at: <https://www.gov.scot/publications/first-estimate-of-gdp-2020-q3/>
9. Oxford Economics 2020. £ millions, 2016 prices
10. Oxford Economics 2020. £ millions, 2016 prices (figures rounded to nearest 100)
11. Oxford Economics 2020
12. Scottish Government (2020). Monthly Business Turnover Index: October 2020. Available online at: <https://www.gov.scot/publications/monthly-business-turnover-index-october-2020/>
13. Burning Glass Technologies 2020
14. UK Government (2020). Coronavirus Job Retention Scheme statistics: December 2020. Available online at <https://www.gov.uk/government/statistics/coronavirus-job-retention-scheme-statistics-december-2020>
15. Disclosure control has been applied where figures are less than 5 or where such small numbers can be identified through differencing. SDS (2020) PACE redundancy data (internal source). SDS (2020) Modern Apprenticeship Statistics. Available at: <https://www.skillsdevelopmentscotland.co.uk/media/47247/modern-apprenticeship-statistics-quarter-2-2020-21.pdf>
16. Labour Force Survey, accessed via NOMIS November 2020. Data is for August – October 2020
17. Annual Population Survey, accessed via NOMIS October 2020. Data is for July 2019-June 2020
18. DWP accessed via DWP Stat Xplore. Data is for January – November (provisional) 2020
19. Annual Population Survey, accessed via NOMIS October 2020. Data is for July 2019-June 2020

References (cont.)

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>
21. Percentages do not sum to sum to 100. Source: Scottish Funding Council (2019). College Leaver Destinations 2018/19. Available online at: http://www.sfc.ac.uk/web/FILES/statisticalpublications_sfcst072020/College_Leaver_Destinations_2018-19_Full_Report.pdf
22. Percentages do not sum to sum to 100. Source: Scottish Funding Council (2020). HE Students and Qualifiers at Scottish Institutions 2018-19. Available online at: <http://www.sfc.ac.uk/publications-statistics/statistical-publications/2020/SFCST042020.aspx>
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, 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.
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
30. Scottish Government (2020). Coronavirus (COVID-19): impact on equality – research. Available at: <https://www.gov.scot/publications/the-impacts-of-covid-19-on-equality-in-scotland/>
31. Data on this page sourced from Oxford Economics, 2020 and Burning Glass Technologies, 2020
32. Enterprise and Skills Strategic Board Sub-group, Scottish Government (2020). Coronavirus (COVID-19): measures to mitigate the labour market impacts – report. Available online at: <https://www.gov.scot/publications/report-enterprise-skills-strategic-board-sub-group-measures-mitigate-labour-market-impacts-COVID-19/>
33. Scottish Government (2020) Programme for Government. Available at: <https://www.gov.scot/programme-for-government/>
34. Enterprise and Skills Strategic Board Sub-group, Scottish Government (2020). Coronavirus (COVID-19): measures to mitigate the labour market impacts – report. Available online at: <https://www.gov.scot/publications/report-enterprise-skills-strategic-board-sub-group-measures-mitigate-labour-market-impacts-COVID-19/>

Appendix 1

| Occupational group | Job description | Occupations within this group include: |
|--|--|---|
| 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. | <ul style="list-style-type: none"> • 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. | <ul style="list-style-type: none"> • 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. | <ul style="list-style-type: none"> • 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. | <ul style="list-style-type: none"> • Health 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. | <ul style="list-style-type: none"> • 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. | <ul style="list-style-type: none"> • 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

| Occupational group | Job description | Occupations within this group include: |
|--|--|---|
| 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. | <ul style="list-style-type: none"> • 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. | <ul style="list-style-type: none"> • 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. | <ul style="list-style-type: none"> • 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. | <ul style="list-style-type: none"> • 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. | <ul style="list-style-type: none"> • 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. | <ul style="list-style-type: none"> • Administrative Occupations: Government and Related Occupations • Administrative Occupations: Finance • Administrative Occupations: Records • Other Administrative Occupations • Administrative Occupations: Office Managers and Supervisors |
| 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. | <ul style="list-style-type: none"> • Secretarial and Related Occupations |

Appendix 1

| Occupational group | Job description | Occupations within this group include: |
|---|--|---|
| Skilled Agricultural and Related Trades | 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"> • Agricultural and Related Trades |
| Skilled Metal, Electrical and Electronic Trades | 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"> • 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 |
| Skilled Construction and Building Trades | 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"> • Construction and Building Trades • Building Finishing Trades • Construction and Building Trades Supervisors |
| Textiles, Printing and Other Skilled Trades | 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"> • Textiles and Garments Trades • Printing Trades • Food Preparation and Hospitality Trades • Other Skilled Trades |
| Caring Personal Service Occupations | 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"> • Childcare and Related Personal Services • Animal Care and Control Services • Caring Personal Services |
| Leisure, Travel and Related Personal Service Occupations | 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"> • Leisure and Travel Services • Hairdressers and Related Services • Housekeeping and Related Services • Cleaning and Housekeeping Managers and Supervisors |
| Sales Occupations | 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"> • Sales Assistants and Retail Cashiers • Sales Related Occupations • Sales Supervisors |

Appendix 1

| Occupational group | Job description | Occupations within this group include: |
|--|--|--|
| Customer Service Occupations | 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"> • Customer Service Occupations • Customers Service Managers and Supervisors |
| 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. | <ul style="list-style-type: none"> • 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. | <ul style="list-style-type: none"> • 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. | <ul style="list-style-type: none"> • 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. | <ul style="list-style-type: none"> • Elementary Administration Occupations • Elementary Cleaning Occupations • Elementary Security Occupations • Elementary Sales Occupations • Elementary Storage Occupations • Other Elementary Services Occupations |