Skills Development Scotland

Regional Skills Assessment

Forth Valley

October 2024

Regional Skills Assessments

First launched in 2014, the Regional Skills Assessments (RSAs) provide a robust and consistent evidence base to support partners in strategic skills investment planning. Skills Development Scotland (SDS) has worked with key partners and stakeholders in the production of RSAs to ensure an inclusive approach to their development, dissemination and utilisation.

RSAs include forecast data that has been commissioned through Oxford Economics. The Technical Note[1] provides full detail on the caveats that must be applied when using forecast data, but broadly, it should be noted that:

- Forecasts are based on what we know now and include past and present trends projected into the future.
- The more disaggregated they become, especially at smaller geographical units, the less reliable they are likely to be.
- Their value is in identifying likely directions of travel rather than predicting exact figures.
- The forecasts do not account for national or regional activities, initiatives or investments that are planned.

Industries and occupations used in the RSAs are defined by standard industrial classifications (SIC)[2] and standard occupational classifications (SOC).[3]

This RSA report is for Forth Valley, which covers the Clackmannanshire, Falkirk and Stirling local authorities. The local authorities covered in this report align with those in the Forth Valley Regional Economic Partnership.

The RSAs are part of a suite of Labour Market Insight publications by SDS. Other products in the suite include:

Economy, People and Skills report which provides succinct and up-to-date evidence on Scotland's economy, businesses and people. It is updated monthly.

Sectoral Skills Assessments provide Labour Market Insight for key sectors across Scotland. These are updated annually.

The **Data Matrix** is an interactive tool, offering more detailed data from a variety of sources in a visually engaging format. It is updated frequently.

Throughout the report, we indicate where **local authority information is available through the Data Matrix.** The Data Matrix also contains additional data for the region, including data on employment, unemployment, and economic inactivity from the Annual Population Survey. These are available under the theme Skills Supply.

RSA Summary Infographics are also available, which provide a summary of the forecast data down to local authority level.

Alongside the suite of Labour Market Insight publications, SDS also produces a wide range of reports such as statistics on Modern Apprenticeships and the Annual Participation measure for 16-19 year olds. This includes a wide range of data related to equalities. Further information can be found on the Publications and Statistics section of the SDS website.

We value user feedback on the Regional Skills Assessments. If you would like to provide feedback, please do so **here.** For any further information or queries on the RSAs or any of our other products, please contact: **RSA@sds.co.uk**

We held a series of webinars to complement the publication of the Regional Skills Assessments.

The recording of the Forth Valley webinar can be found on the SDS YouTube Channel here.

You can also watch the webinars for other regions and key sectors in Scotland here.

1. RSA Technical Note (2024).
2. Office for National Statistics UK Standard Industrial Classification (SIC) 2007.
3. Office for National Statistics UK Standard Occupational Classification (SOC) 2010.

The Context for Scotland's Labour Market

Within the last 10 years, the economy has faced significant disruption due to events such as the pandemic, Brexit, the war in Ukraine, and the cost-of-living crisis. In addition, megatrends around demography, technology, and the environment have continued shaping Scotland's economy and labour market, many of which are interdependent. Below is an overview of the drivers expected to have the greatest influence on Scotland's labour market outlook in the near term, based on a comprehensive analysis of structural and cyclical factors.

The Economy

The economic outlook for Scotland has improved, but growth is still expected to be modest in 2024, after annual GDP figures estimated the Scottish economy (like that of the UK) remained broadly flat throughout 2023. While inflation rates have eased from their peak in October 2022, the effects of rising prices and high interest rates continue to impact Scottish households and businesses. Scotland has experienced a tight labour market in recent years, but there have been signs of this loosening in 2024.

Demographic Change

Scotland has an ageing population. In 2022, around 20 per cent of Scotland's population was aged 65 years or over, and around 15 per cent were aged under 15 years old. Population growth is also expected to slow in the next decade, and it is anticipated that the country is likely to rely on in-migration for population growth. These demographic changes in Scotland have important implications for the labour market and economy.

Inclusive Growth and Equality

Scotland continues to experience inequality, which can impact individuals' access to labour market opportunities. Cost-of-living pressures have affected different groups disproportionately, particularly in lower-income households. Geographical inequalities also exist across Scottish regions that can affect individuals' access to opportunities. There have been some advances in improving diversity within the workforce and reducing inequality, but challenges remain.

Technology and Automation

Scotland has a strong technology sector, with specific strengths in digital technology, life sciences and financial technology (fintech). The current makeup of the technology sector suggests AI will likely be the most important technological advance for the foreseeable future. It is estimated that 60 per cent of jobs in developed countries will be affected by AI. This could be disruptive within the labour market, creating challenges and opportunities for job roles and businesses.

Climate Change

The Scottish and UK governments have committed to meeting targets for Net Zero carbon emissions. The transition to Net Zero will directly impact jobs, with potential for job growth in Scotland. Upskilling and reskilling will be vital to equip Scotland's workforce with the skills needed to meet the transition. Scotland is well placed to take a lead in the development of new green technologies building on its significant natural resources and strengths in key sectors.

A fuller report on Scotland's Labour Market Drivers can be found here.

Regional Insight[1]

The Forth Valley Regional Economic Partnership is continuing to develop a Regional Economic Strategy (RES). Partners are working to develop a Forth Valley Regional Skills Action Plan (FVRSAP) to support the successful delivery of the RES.

The FVRSAP is a framework for collaboration around skills development in the region. It has been informed by a review of evidence as well as consultation with employers and stakeholders. The plan supports the two deals and the Grangemouth Just Transition Plan which is under development at the time of writing. The plan was formed around three central missions:

- **Mission 1**: **Businesses** in Forth Valley have the people and skills to flourish;
- **Mission 2**: A just and fair labour market for **people** living and working in Forth Valley;
- **Mission 3**: Ensuring a **collaborative** approach to addressing regional skills needs.

The Forth Valley region has the Stirling and Clackmannanshire City Regional Deal and the Falkirk Growth Deal within its catchment. The Stirling and Clackmannanshire City Regional Deal is looking to invest in a Regional Skills and Inclusion Programme, Innovation, Culture Heritage and Tourism, Transport, Connectivity and Low Carbon, Capital Fund for Clackmannanshire and Infrastructure. The Falkirk Growth Deal aims to channel investment behind two pillars of Innovative Industry and Creating Great Places, including a series of interlinked projects. The Skills Transition Centre which is part of the Falkirk deal aims to deliver skills for the Just Transition to Net Zero supporting industries including down-stream petroleum, chemicals and polymers based in the Grangemouth cluster. It will invest in state-of-the art kit, equipment and programme development, accelerating the use of virtual reality (VR), augmented reality (AR), simulation and digital classrooms for skills/training delivery.

Also part of the Falkirk Deal Forth Ports are leading on a Transportation, Renewables and Career Exploration Hub (TRACE), the Hub showcasing advanced simulation, VR and AR for young people to explore new careers, with access to local employment opportunities. It will provide upskilling opportunities to those employed in transitioning industries with a focus on maritime, logistics and hydrogen.

Within the Stirling and Clackmannanshire Deal Flexible Skills Pathways are under development. Each of the Five thematic Skills Pathway Plans (SPPs) outline how it will improve access to jobs and training opportunities created by Deal projects for people facing disproportionate exclusion from the regional labour market.

The Grangemouth Future Industry Board (GFIB) will be responsible for the ownership and delivery of a Just Transition Plan across the region.

In early 2023, the UK and Scottish Governments announced plans for investment in The Forth Green Freeport. The proposals aspire to deliver up to an additional 50,000 jobs across the UK, generate £6 billion in investment and contribute over £4 billion in GVA across sites in Grangemouth, Rosyth, Leith, Burntisland and Edinburgh Airport. Activities will focus on Renewables, Advanced Manufacturing, Alternative Fuels, Carbon Capture Utilisation and Storage, Shipbuilding, Logistics and the Creative Industries. The full business case for this investment has now been submitted.

Both UK and Scottish Government are joint-funding Project Willow, a study that is building a new long-term industry at the refinery site in Grangemouth, including low carbon hydrogen, clean eFuels and sustainable aviation fuels. Skills and talent are part of the study.

The forecasts used in this Regional Skills Assessment are policy and investment neutral. This means the figures present a baseline outlook that takes into account historical trends and external economic conditions, but the figures do not reflect investment or policy that is unconfirmed or at planning/development stage. The forecasts should be used in conjunction with other sources, and readers are encouraged to overlay these with their own local knowledge.

1. Insight from the region gathered via Skills Development Scotland (2024).

Economic Performance[1]

Forth Valley estimated GVA in 2024: **£7,496**m

Forth Valley was estimated to generate 5.1% of Scotland's output in 2024. This share of GVA ranked the region in the second highest quartile of RSA regions for GVA contribution to the Scottish economy.

In 2024, the highest value industries in Forth Valley were estimated to be:

Human Health and Social Work Activities	**£991m**
Manufacturing	**£944m**
Wholesale and Retail Trade	**£858m**
Real Estate Activities*	**£645m**

GVA forecast average annual growth (2024-2027)

Forth Valley: **1.3%**

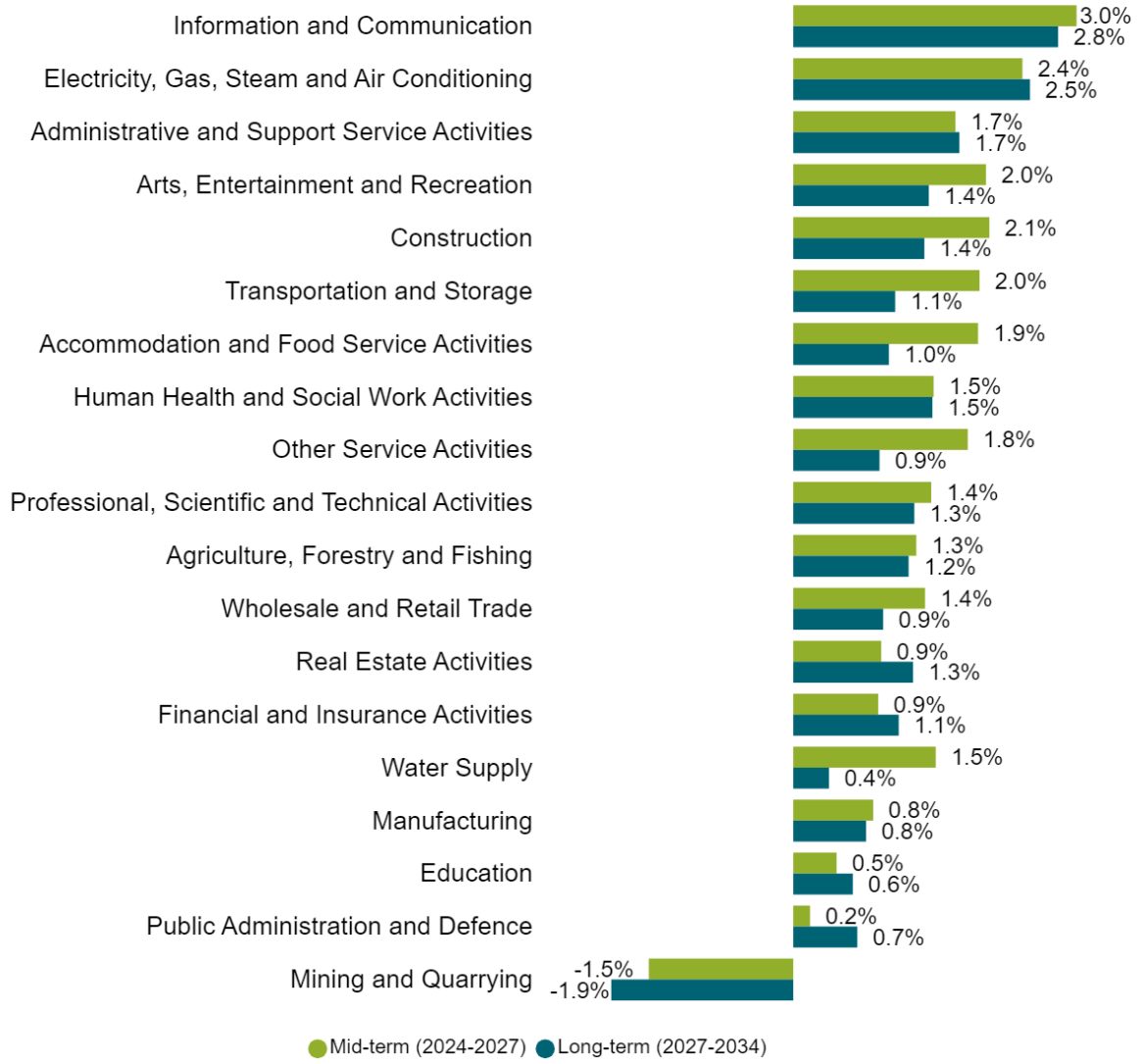
Scotland: **1.4%**

GVA forecast average annual growth (2027-2034)

Forth Valley: **1.1%**

Scotland: **1.3%**

Forecast Average Annual GVA Change by Industry (%), Forth Valley



For data on GVA at local authority level please see the Data Matrix.
(Theme: Skills Demand; Topic: Economic Output (GVA))

1. SDS (2024). Oxford Economics Forecasts.

*GVA in the Real Estate industry is inflated by owner-occupier imputed rent. This reflects the value of services provided by homeowners who own and live in their homes.

Productivity[1]

In this report, we have used Oxford Economics' measure of productivity, which is calculated by dividing total regional GVA by total regional employment (measured by jobs). Please note, there are different ways of calculating productivity, and caution is needed when interpreting productivity data presented in this report. It must be considered in the context of other data and insight.

Productivity in **Forth Valley** was estimated to be **£53,200** in 2024. In comparison, the Scottish average was estimated to be £52,000.

Mid-term Productivity

From 2024 to 2027, productivity in Forth Valley is forecast to grow by 0.6% on average each year. Over the same period, the Scottish growth rate is forecast to be 0.6%.

Forth Valley forecast productivity in 2027: **£54,200**

Scotland forecast productivity in 2027: **£53,000**

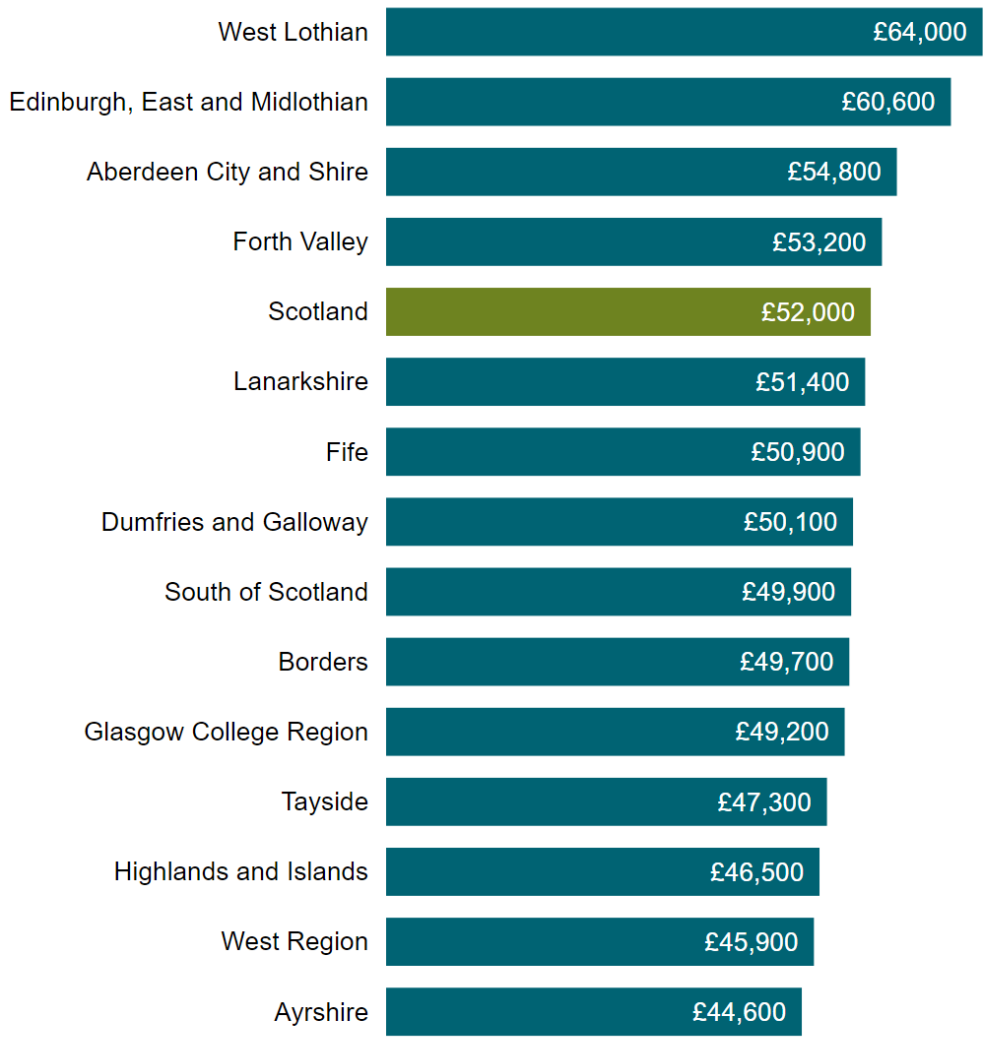
Long-term Productivity

From 2027 to 2034, productivity in Forth Valley is forecast to grow by 1.0% on average each year. Over the same period, the Scottish growth rate is forecast to be 1.1%.

Forth Valley forecast productivity in 2034: **£58,100**

Scotland forecast productivity in 2034: **£57,100**

Productivity (2024)



For data on productivity at local authority level please see the Data Matrix.
(Theme: Skills Demand; Topic: Economic Output (GVA) per Job)

1. SDS (2024). Oxford Economics Forecasts.

Regional Employment[1]

Workforce Size 2024: 131,900 people

The region's workforce was estimated to account for **5.0%** of Scottish employment.

Over the last 10 years (2014-2024), regional employment was estimated to have **grown** by **9.8%** (**11,700** people). In comparison, employment in Scotland increased by 3.8%.

Workforce Size 2027: 134,300 people

The region's workforce is forecast to **grow** by **1.8%** or **2,400** people between 2024 and 2027.

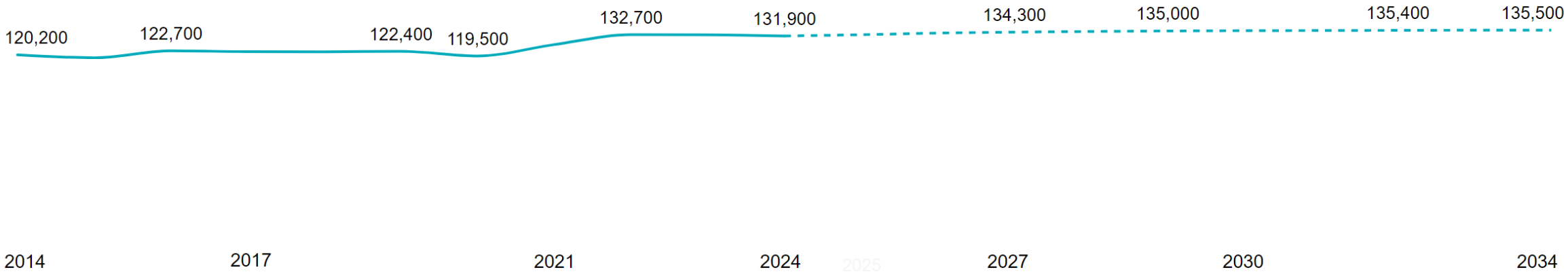
Compared to a Scotland-wide increase of **1.9%** or **49,800** people.

Workforce Size 2034: 135,500 people

The region's workforce is forecast to **grow** by **0.9%** or **1,200** people between 2027 and 2034.

Compared to a Scotland-wide increase of **1.2%** or **32,000** people.

Employment and forecast employment (2014-2034) (people), Forth Valley



For data on employment and forecast employment at local authority level please see the Data Matrix.
(Theme: Skills Demand; Topic: Employment Forecast)

1. SDS (2024). Oxford Economics Forecasts.

Employment by Industry[1]

The largest employing industries in the region in 2024 (based on people) were estimated to be:

Human Health and Social Work Activities
28,500

Wholesale and Retail Trade
14,600

Education
13,500

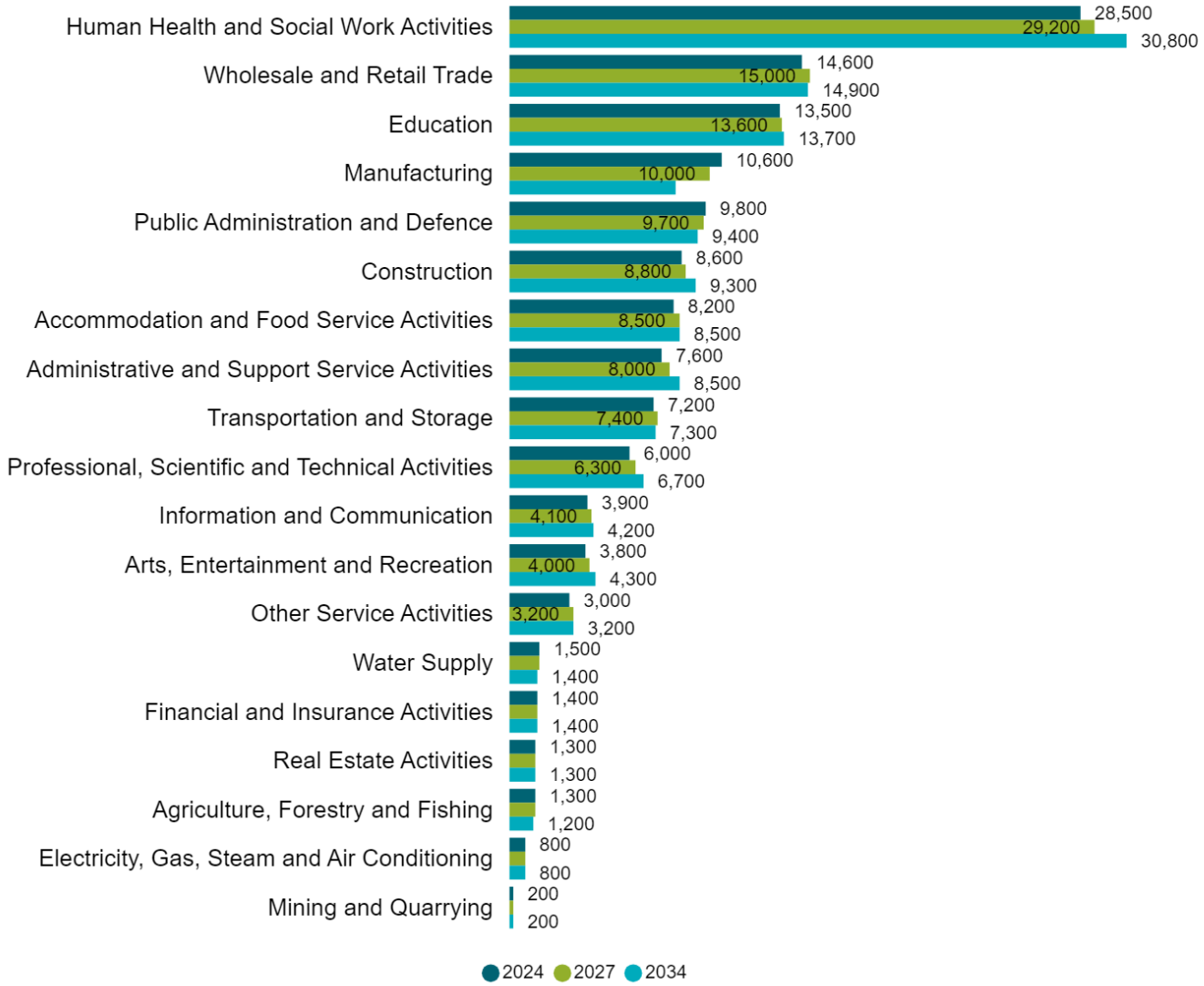
Between 2024 and 2027, employment in the region is forecast to grow, however industries will have varying performance. The greatest employment growth is forecast in Human Health and Social Work Activities, with 700 more people by 2027. While Manufacturing is forecast to have the greatest employment contraction (-600 people) in the mid-term.

Over the long-term, between 2027 and 2034, the greatest employment growth is forecast in Human Health and Social Work Activities, with 1,500 more people by 2034. While Manufacturing is forecast to have the greatest employment contraction (-1,700 people) in the long-term.

In 2024, the Manufacture of Coke and Refined Petroleum Products was estimated to be the region's greatest specialism, with the percentage of employment in this industry 12.6 times greater than the Scottish average. The second largest specialism was estimated to be Manufacture of Motor Vehicles, Trailers and Semi-Trailers (4.7 times greater in the region than the Scottish average).

Figures may not sum due to rounding.

Employment by Industry, Forth Valley



1. SDS (2024). Oxford Economics Forecasts.

For data on employment by industry/key sector at local authority level please see the Data Matrix.
(Theme: Skills Demand; Topic: Employment Forecast by Industry)

Employment by Occupation[1]

The largest employing occupation groups in the region in 2024 (based on people) were estimated to be:

Administrative Occupations
14,700

Elementary Occupations: Clerical and Services
9,800

Caring Personal Service Occupations
9,500

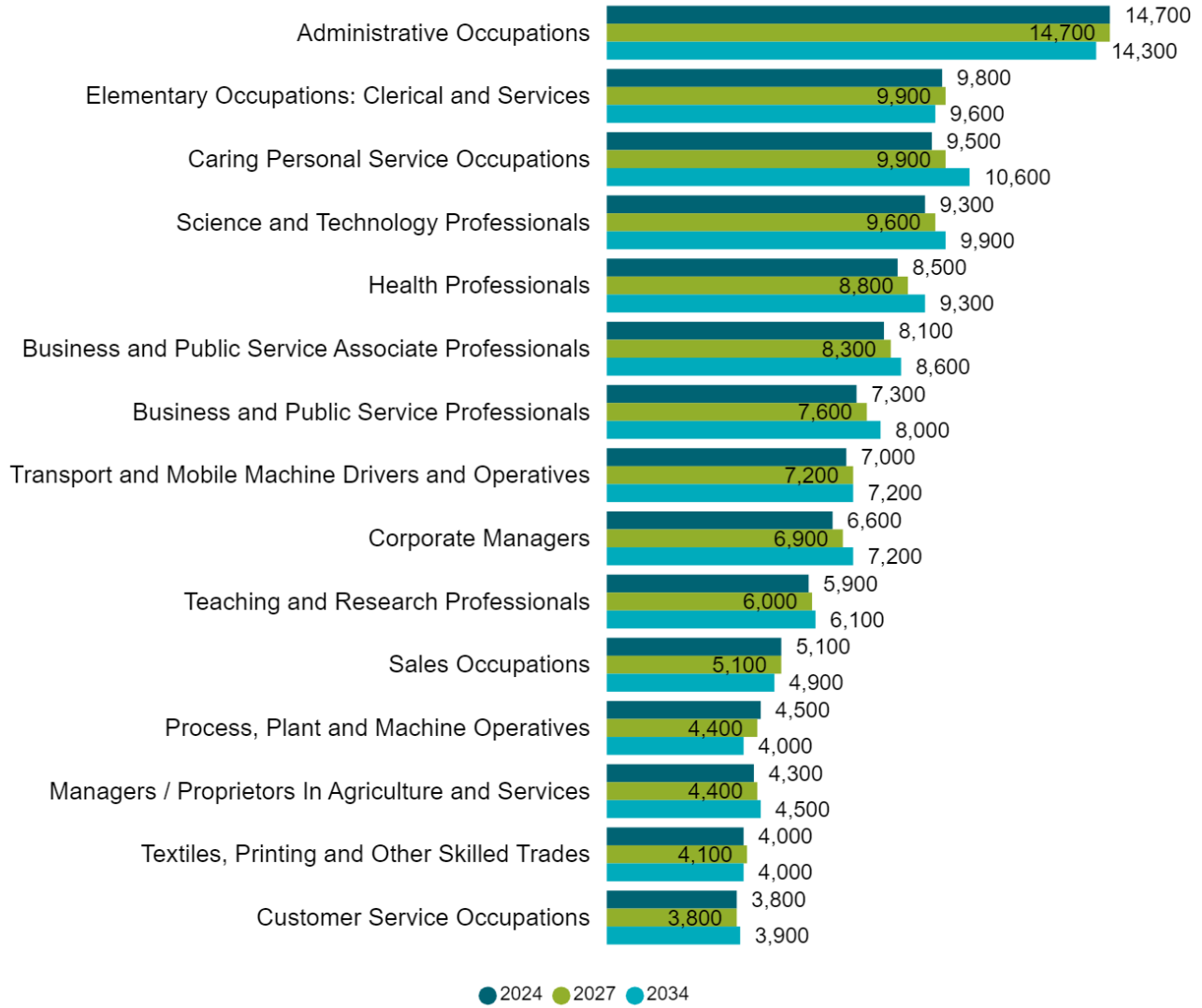
In 2024, 44.5% of employed people in the region were in 'higher-level' occupations*, which was a lower percentage of the workforce than Scotland (49.2%). 'Mid-level' occupations accounted for 29.9% of the workforce, which was a higher percentage of the workforce than Scotland (27.0%). Around 25.6% of people were employed in 'lower-level' occupations, which was a higher percentage of the workforce than Scotland (23.8%).

Between 2024 and 2027, the greatest growth is forecast to be in Caring Personal Service Occupations (400 people). While Process, Plant and Machine Operatives is likely to experience the greatest contraction (-100 people).

Over the long-term between 2027 and 2034, the greatest growth is forecast to be in Caring Personal Service Occupations (700 people). While Process, Plant and Machine Operatives is likely to experience the greatest contraction (-400 people).

Figures may not sum due to rounding.

Employment by Top 15 Occupations, Forth Valley



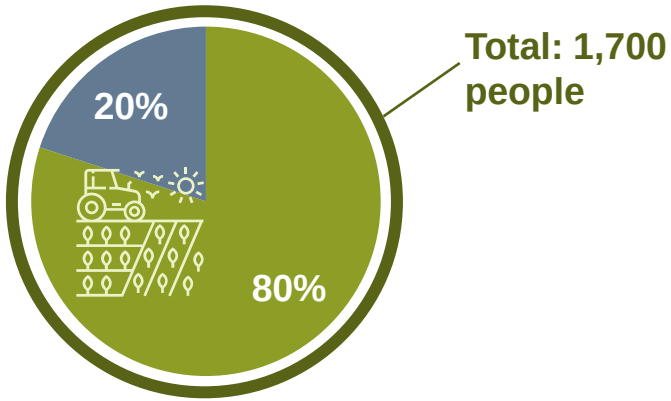
For data on employment by occupation at local authority level please see the Data Matrix.
(Theme: Skills Demand; Topic: Employment Forecast by Occupation)

1. SDS (2024). Oxford Economics Forecasts.
* See RSA Technical Note (2024) for an explanation of what is defined as 'high-level', 'mid-level' and 'low-level' occupations.

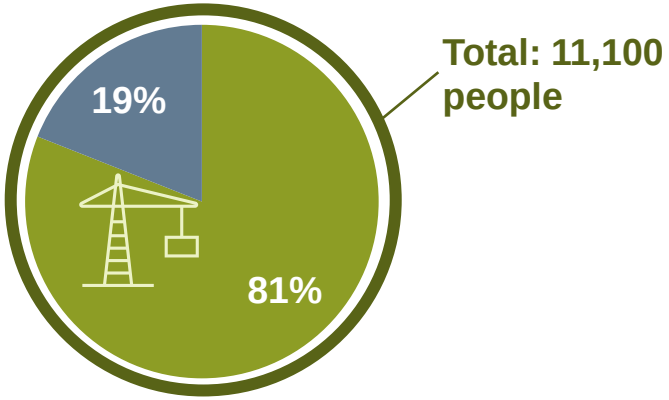
Transition to Net Zero[1]

Identified as part of the Climate Emergency Skills Action Plan (CESAP), the sectors[2] listed below **make a significant contribution to the Transition to Net Zero** and have the greatest potential for skills implications and jobs growth arising from it. We have been able to establish the split between green jobs and non-green jobs for the Regional Outcome Agreement (ROA) areas. Green jobs in Scotland are defined by three different categories: enhanced skills and knowledge, increased demand and new and emerging.[3] Presented below are the **number of people estimated to be employed in these sectors within Forth Valley in 2024.**

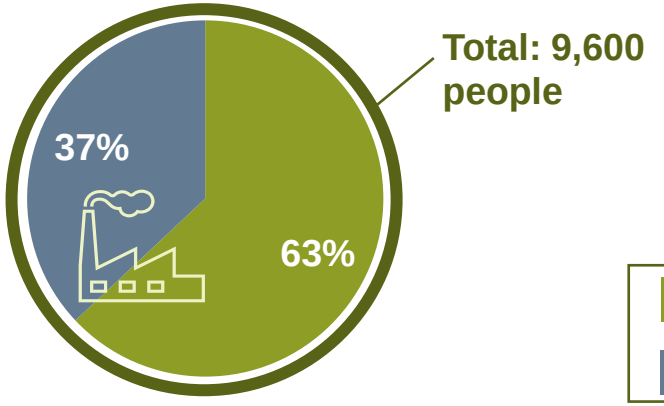
Agriculture

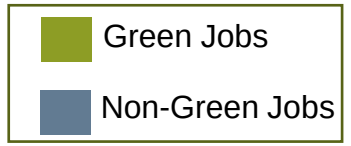


Construction

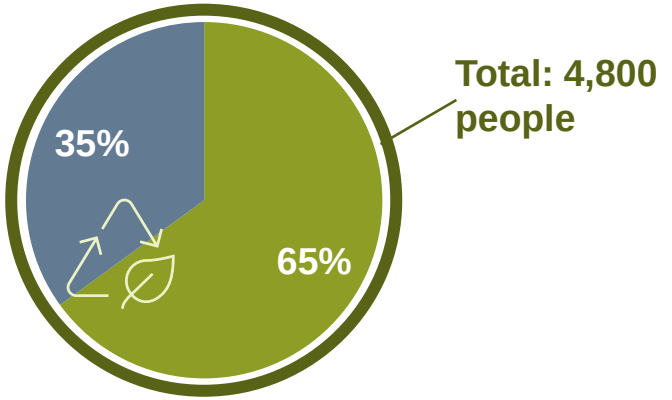


Manufacturing (with Engineering)

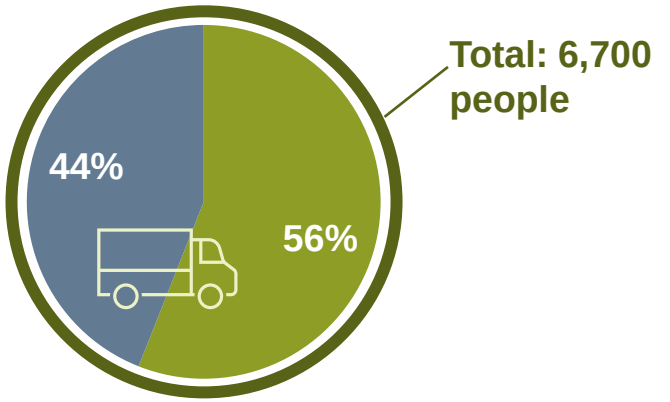




Energy and Waste Treatment



Transport



The total number of people employed in the sectors that will make a significant contribution to Net Zero in Scotland was estimated to be 679,200 in 2024. The Forth Valley region was estimated to account for **5% of Scotland's total** (or 34,000 people). Of the sectors of most importance to the transition Construction was the largest employing sector (33%) in the region.

Figures may not sum due to rounding.

1. SDS (2024). Oxford Economics Forecasts.
2. The sectors that make a significant contribution to the Net Zero transition were identified in **the Green Jobs in Scotland report**.

Due to the methodology adopted, the footprint of sectors presented on this page differs from the industry footprint presented elsewhere in this report, and in our Sectoral Skills Assessments (SSAs). Please find a full list of the Standard Industrial Classification (SIC) codes used to define these sectors in the Green Jobs in Scotland report (and on this page) here.

3. Please see slide 12 for more information.

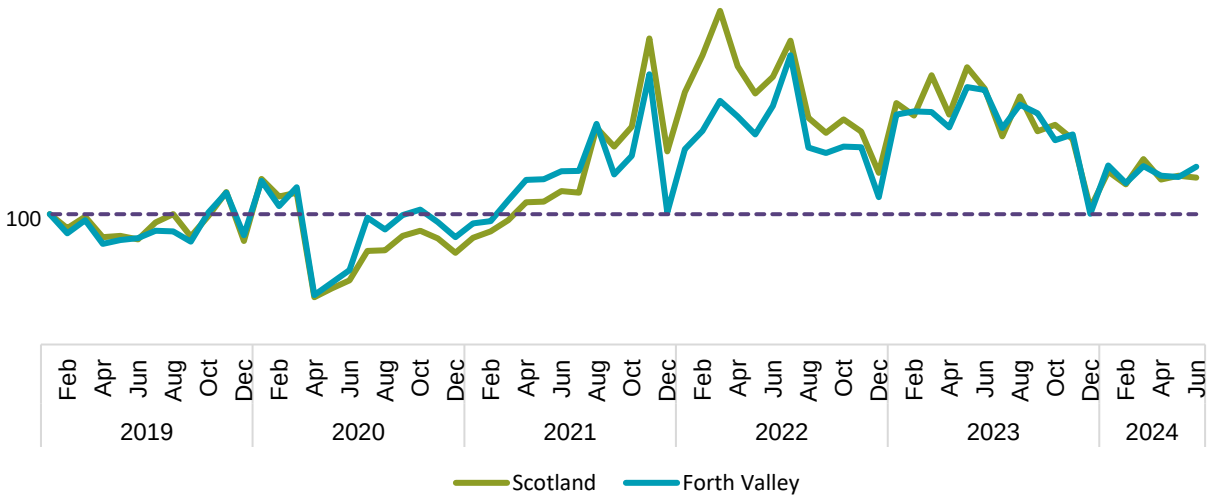
Job Postings in Forth Valley[1]

Online job postings data provides a useful barometer for the health of the jobs market, real-time employer demand and can indicate changing skills demands. It is important to note that the data does not capture all activity, so it should be considered as an estimate only.

The labour market has been cooling across Scotland, and job postings have declined from a peak in 2022. In Forth Valley, the peak in job postings occurred in July 2022, slightly later than Scotland's peak in March 2022. Whilst it has cooled, the heat of the labour market in 2021 and 2022 was exceptional, and the levels of job postings across Scotland and Forth Valley remain above pre-pandemic levels (January 2019).

In the first six months of 2024, there has been sustained demand for workers in the region. Job postings in Forth Valley accounted for 4.9% of Scotland's total job postings between January and June 2024.

Index* of Job Postings, (January 2019 = 100)



Between January and June 2024, there were **12,100 job postings** in **Forth Valley,** of which:

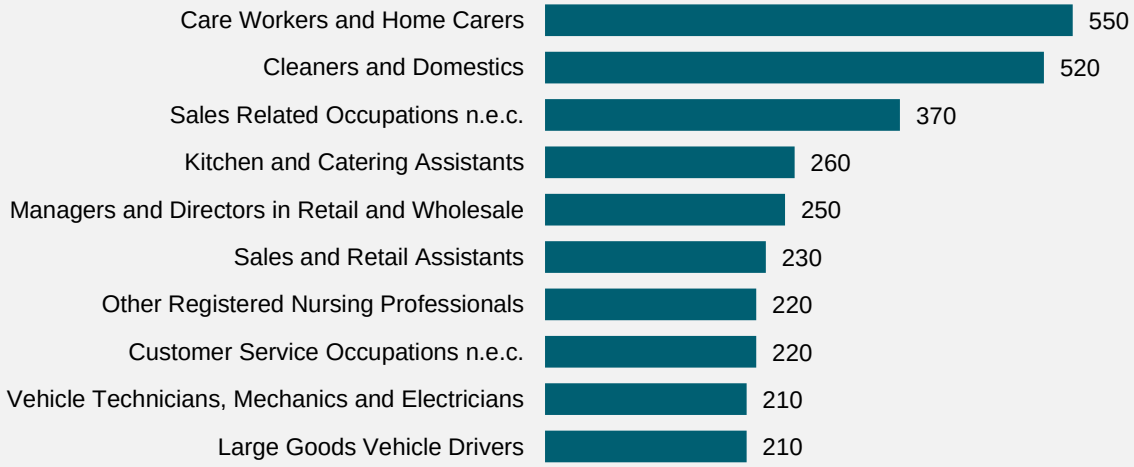
The locations with the most jobs advertised were:

- **Stirling** — 4,000 postings
- **Falkirk** — 3,900 postings
- **Grangemouth** — 1,300 postings

The most requested skills and knowledge were:

- **Communications**
- **Management**
- **Customer Service**
- **Detail Oriented**

The top job postings were:



Figures may not sum due to rounding.

*An Index shows the change over time. This graph displays the data for job postings converted to a reference value. This shows the relative change for Scotland and the region over time. Over 100 indicates where there has been an increase compared to the base or reference year (in this case January 2019), whereas below 100 shows a decrease.

1. Lightcast, 2024.

Green Job Postings in Forth Valley[1]

The **Green Jobs in Scotland** research uses an **inclusive definition** to define green jobs.

This definition recognises that there will be an ongoing process of 'greening' across the economy due to the transition to Net Zero, and a broad range of jobs will be impacted in different ways as a result.

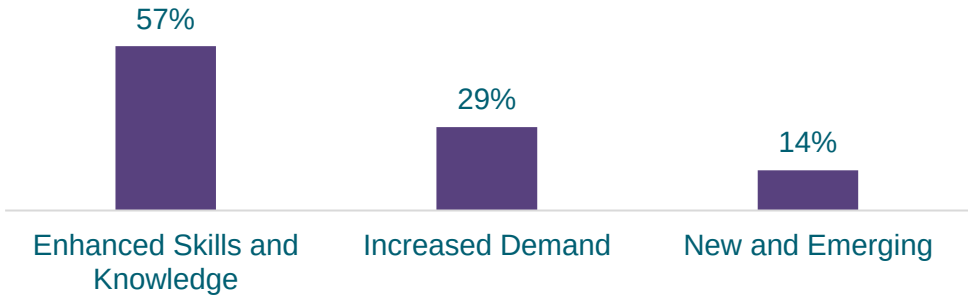
Green jobs can be classified into one of the following three categories:

1. **Enhanced Skills and Knowledge**: Existing occupations which will require significant change to the work and worker requirements due to green economy activities.
2. **Increased Demand**: Existing occupations which will be needed in higher numbers due to green economy activities.
3. **New and Emerging**: New occupations which are created because of the need for unique work and worker requirements due to green economy activities.

The full list of occupations (defined using Standard Occupation Classification (SOC) 2020) can be found here.

Out of the 12,100 job postings in Forth Valley between January and June 2024, **39.3% (4,800) were for green jobs**. This was a lower proportion of green job postings than the Scottish average (42.3%). The number of green job postings in the region accounted for 4.5% of all green job postings in Scotland. The demand for green jobs in the region and Scotland peaked in 2022 before cooling. However, demand for green jobs in the region remains above the pre-pandemic level.

Between January and June 2024, **over half of green job postings** in Forth Valley were for Enhanced Skills and Knowledge roles.



The green jobs in demand in each category between January and June 2024 included:

Enhanced Skills and Knowledge:

Vehicle Technicians, Mechanics and Electricians

Increased Demand:

Large Goods Vehicle Drivers

New and Emerging:

Mechanical Engineers

The median advertised salary for **green jobs** in Forth Valley was **£34,800*** in the first six months of 2024.

This was higher than the median advertised salary for all jobs in the region which was £29,800**.

More information on the CESAP Pathfinder can be found here.

1. Lightcast, 2024.

*Median salary based on 46% of job postings.

**Median salary based on 45% of job postings.

Future Demand in the Mid-Term (2024-2027)[1]

Oxford Economics' forecasts should be used as guidance only on the overall trends based on current evidence - rather than definitive numbers. There are still a wide range of factors which may impact on the labour market. It is important to note that the forecasts do not account for national or regional activities, initiatives or investments such as those mentioned in our section on Regional Insight, which are likely to influence the outlook presented. Users of the RSAs are encouraged to overlay the forecasts with their local knowledge.

Earlier in the report, we examined the future total employment in Forth Valley. This part of the report focuses on the total requirement, which introduces not only employment growth or contraction but also the need to replace workers leaving the labour market due to retirement and other reasons.

The mid-term forecast suggests there could be a total requirement for **18,300** people in **Forth Valley**. Between 2024 and 2027, replacement demand could create the need for **16,000** people, while **positive** expansion demand is forecast to result in **2,400 additional** workers.

In **Scotland**, there could be a total requirement for **370,800** people in the mid-term. Between 2024 and 2027, replacement demand could create the need for **321,000** people, while **positive** expansion demand is forecast to result in **49,800 additional** workers.

Figures may not sum due to rounding.

Total Requirement
made up of expansion demand and replacement demand to show the total number of people required.

Forth Valley: **18,300** people

Scotland: **370,800** people

=

Replacement Demand
the number of people required to replace workers leaving the labour market (i.e. retirement, move away, or change jobs).

Forth Valley: **16,000** people

Scotland: **321,000** people

+

Expansion Demand
the number of people required as a result of economic growth or contraction.

Forth Valley: **2,400** people

Scotland: **49,800** people

The total requirement by qualification for **Forth Valley**:

SCQF 11-12	SCQF 7-10	SCQF 6	SCQF 5	SCQF 1-4	No qualifications
1,600	8,300	2,800	3,900	500	1,200
9%	45%	16%	21%	3%	7%

The total requirement by qualification for **Scotland**:

SCQF 11-12	SCQF 7-10	SCQF 6	SCQF 5	SCQF 1-4	No qualifications
34,000	175,600	46,600	76,800	10,300	27,400
9%	47%	13%	21%	3%	7%

For data on future demand at local authority level please see the Data Matrix.
(Theme: Skills Demand; Topic: Total Requirement)

1. SDS (2024). Oxford Economics Forecasts.

Future Demand in the Mid-Term (2024-2027) by Industry[1]

By industry, the greatest number of people are forecast to be required in:

Human Health and Social Work Activities
3,300

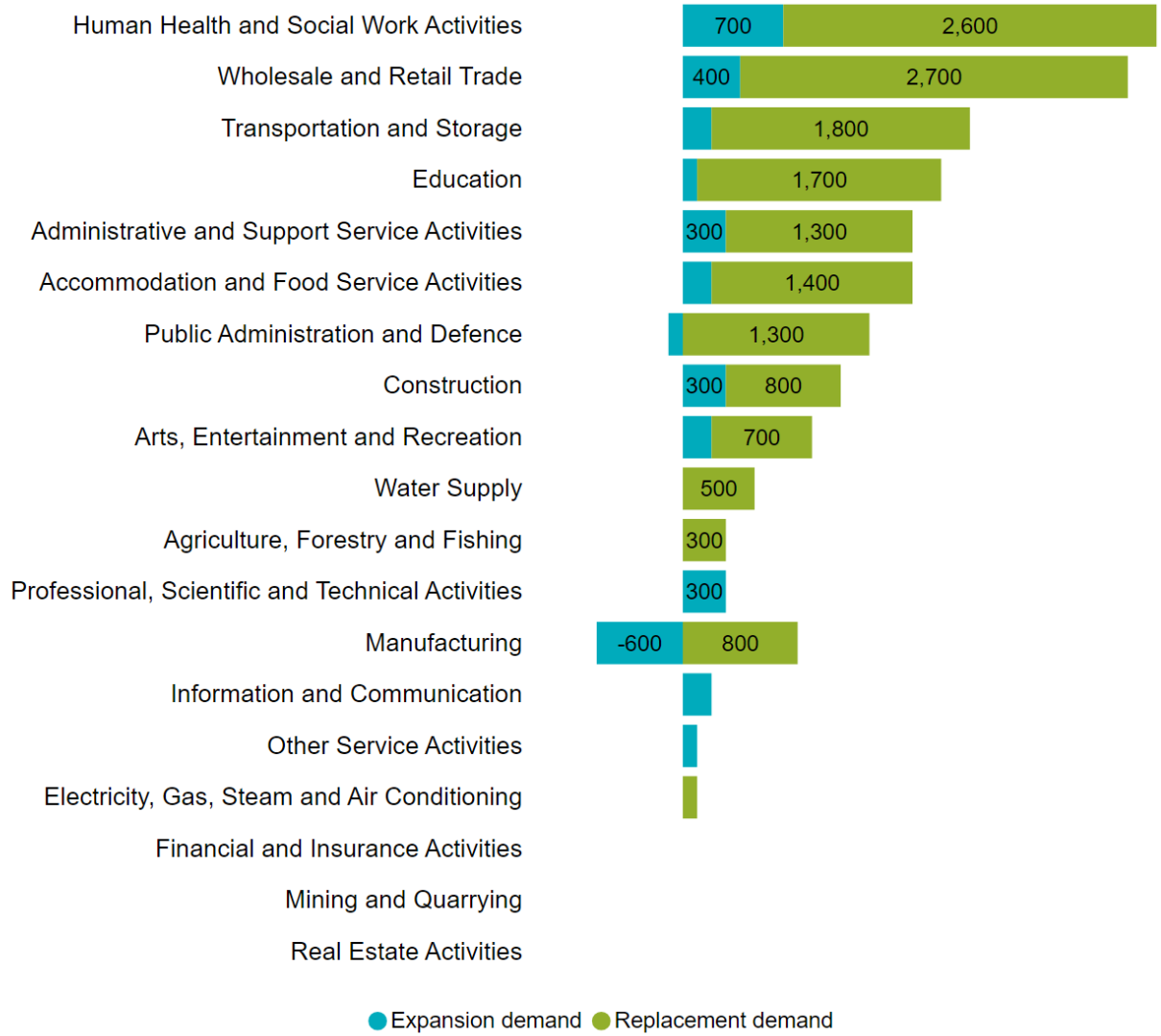
Wholesale and Retail Trade
3,100

Transportation and Storage
2,000

Headline figures for each industry do not show how the composition of the industry is changing. Within industries there are changes to operating practices and consumer behaviours driven by automation, digitalisation and the transition to Net Zero. These shifts are not captured in the aggregated groups. We would encourage readers to bear this in mind when interpreting the data. For further sectoral evidence, please see our Sectoral Skills Assessments.

Figures may not sum due to rounding.

Forecast Total Requirement by Industry (2024-2027), Forth Valley



For data on future demand by industry at local authority level please see the Data Matrix.
(Theme: Skills Demand; Topic: Total Requirement by Industry)

1. SDS (2024). Oxford Economics Forecasts.

Future Demand in the Mid-Term (2024-2027) by Occupation[1]

By occupation, the greatest number of people are forecast to be required in:

Elementary Occupations: Clerical and Services
2,100

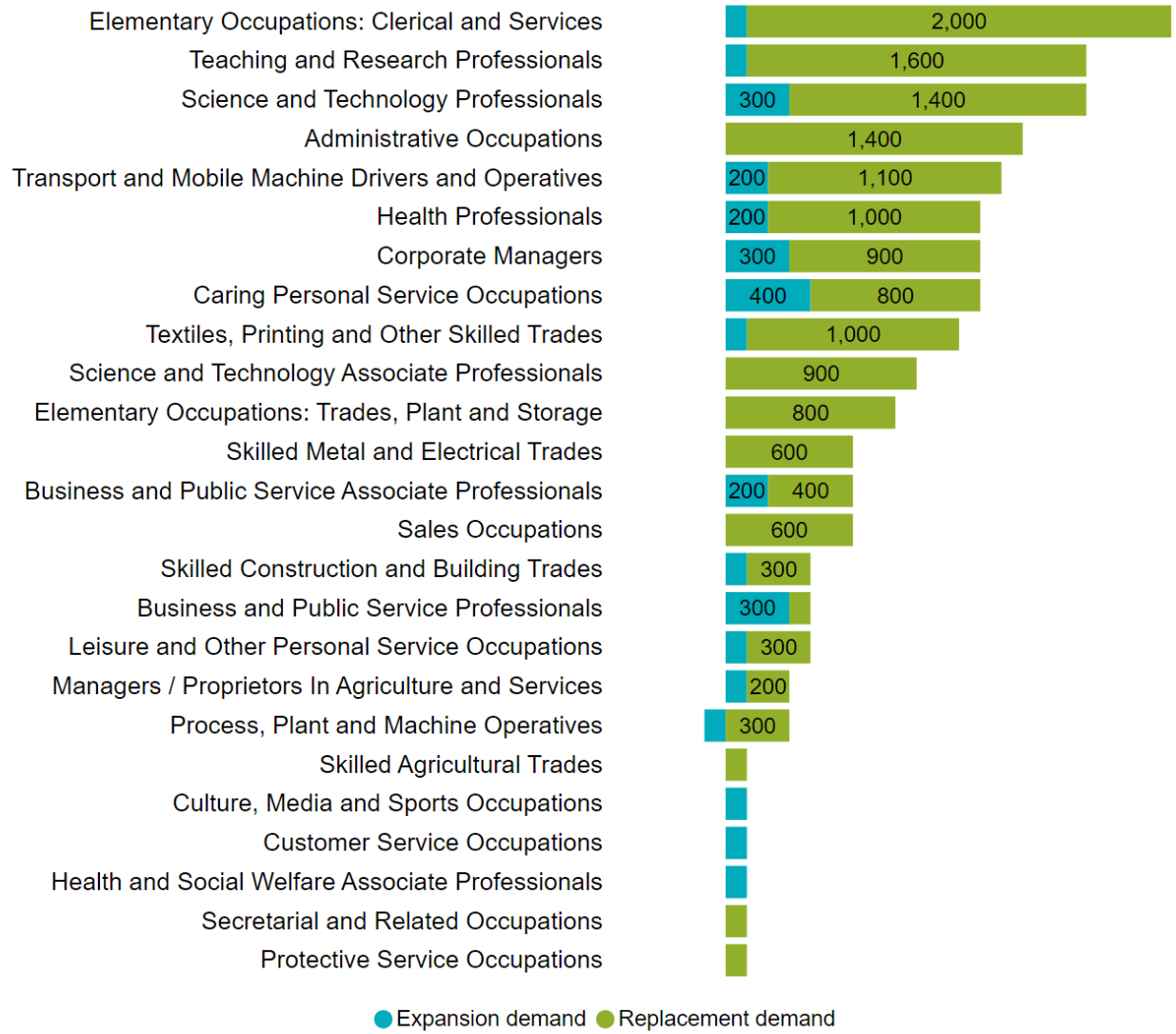
Teaching and Research Professionals
1,700

Science and Technology Professionals
1,700

As mentioned, there is forecast to be a total requirement for 18,300 people in the region over the mid-term. 'Higher-level' occupations* are forecast to account for 44.7% of this total requirement, followed by 28.1% in 'mid-level' occupations and 27.2% in 'lower-level' occupations. Across Scotland, 50.4% of total requirement will be in 'higher-level' occupations, 25.0% in 'mid-level' occupations and 24.6% in 'lower-level' occupations.

Figures may not sum due to rounding.

Forecast Total Requirement by Occupation (2024-2027), Forth Valley



For data on future demand by occupation at local authority level please see the Data Matrix.
(Theme: Skills Demand; Topic: Total Requirement by Occupation)

1. SDS (2024). Oxford Economics Forecasts.
* See RSA Technical Note (2024) for an explanation of what is defined as 'high-level', 'mid-level' and 'low-level' occupations.

Future Demand in the Long-Term (2027-2034)[1]

The long-term forecast is more changeable than the mid-term forecasts and could be influenced by a range of factors that are less known. It is important to note that the forecasts do not account for national or regional activities, initiatives or investments like those mentioned in our section on Regional Insight, which are likely to influence the long-term outlook presented. Oxford Economics' forecasts should be used as guidance on overall trends based on current evidence - rather than definitive numbers.

In Forth Valley, the labour market forecast for the long-term (2027-2034) suggests employment is expected to grow, and there could be opportunities created as a result of the need to replace workers leaving the labour market due to retirement and other reasons.

Forecasts for the long-term suggest there could be a total requirement for **37,500** people in **Forth Valley**. Between 2027 and 2034, replacement demand could create the need for **36,300** people, while **positive** expansion demand is forecast to result in **1,200 additional** workers.

In **Scotland**, there could be a total requirement for **788,900** people in the long-term. Between 2027 and 2034, replacement demand could create the need for **756,900** people, while **positive** expansion demand is forecast to result in **32,000 additional** workers.

Figures may not sum due to rounding.

Total Requirement
made up of expansion demand and replacement demand to show the total number of people required.

Forth Valley: **37,500** people

Scotland: **788,900** people

Replacement Demand
the number of people required to replace workers leaving the labour market (i.e. retirement, move away, or change jobs).

Forth Valley: **36,300** people

Scotland: **756,900** people

Expansion Demand
the number of people required as a result of economic growth or contraction.

Forth Valley: **1,200** people

Scotland: **32,000** people

The total requirement by qualification for **Forth Valley**:

SCQF 11-12	SCQF 7-10	SCQF 6	SCQF 5	SCQF 1-4	No qualifications
3,000	17,200	5,500	8,900	500	2,400
8%	46%	15%	24%	1%	6%

The total requirement by qualification for **Scotland**:

SCQF 11-12	SCQF 7-10	SCQF 6	SCQF 5	SCQF 1-4	No qualifications
67,300	378,500	93,400	180,300	12,100	57,200
9%	48%	12%	23%	2%	7%

For data on future demand at local authority level please see the Data Matrix.
(Theme: Skills Demand; Topic: Total Requirement)

1. SDS (2024). Oxford Economics Forecasts.

Future Demand in the Long-Term (2027-2034) by Industry[1]

By industry, the greatest number of people are forecast to be required in:

Human Health and Social Work Activities
7,500

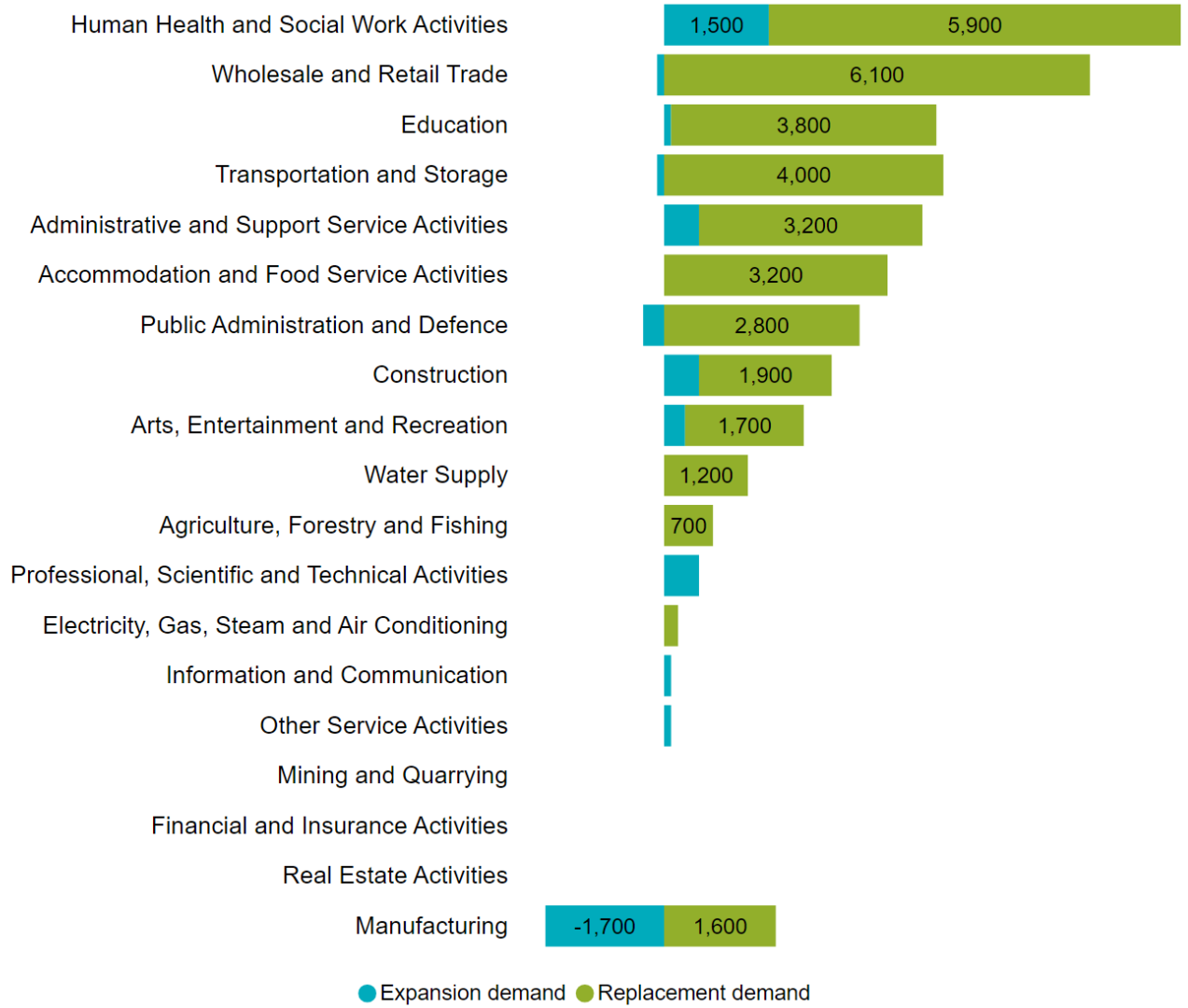
Wholesale and Retail Trade
6,000

Education
3,900

The mid-term forecast analysis indicated that some industries are experiencing a shift in their operational practices, and this trend is expected to continue in the long term.

Figures may not sum due to rounding.

Forecast Total Requirement by Industry (2027-2034), Forth Valley



For data on future demand by industry at local authority level please see the Data Matrix.
(Theme: Skills Demand; Topic: Total Requirement by Industry)

1. SDS (2024). Oxford Economics Forecasts.

Future Demand in the Long-Term (2027-2034) by Occupation[1]

By occupation, the greatest number of people are forecast to be required in:

Elementary Occupations: Clerical and Services
4,200

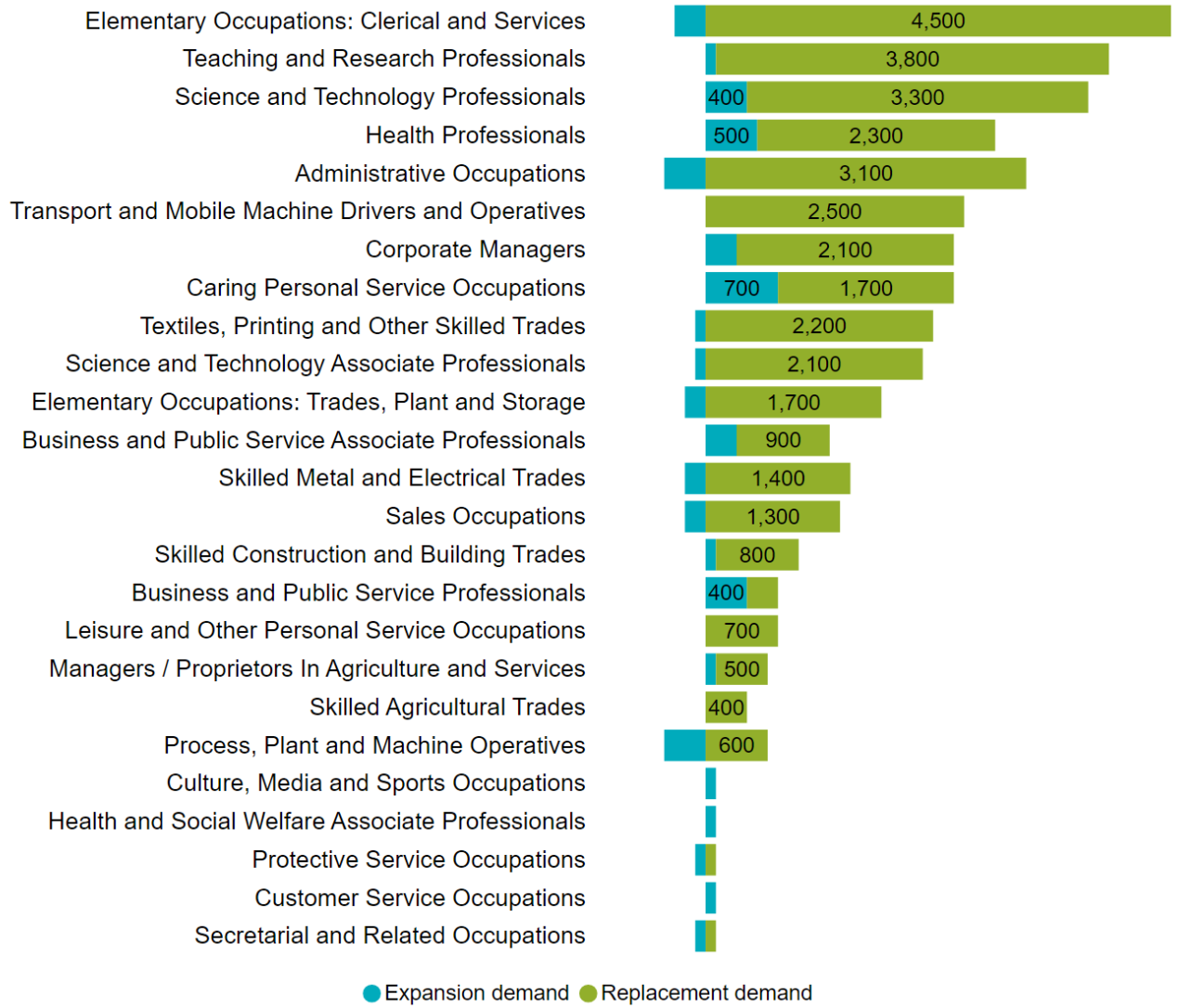
Teaching and Research Professionals
3,900

Science and Technology Professionals
3,600

There is forecast to be a total requirement for 37,500 people in the region over the long-term. 'Higher-level' occupations* are forecast to account for 46.9% of this total requirement, followed by 27.5% in 'mid-level' occupations and 25.7% in 'lower-level' occupations. Across Scotland, 52.4% of total requirement will be in 'higher-level' occupations, 24.7% in 'mid-level' occupations and 22.9% in 'lower-level' occupations.

Figures may not sum due to rounding.

Forecast Total Requirement by Occupation (2027-2034), Forth Valley



For data on future demand by occupation at local authority level please see the Data Matrix.
(Theme: Skills Demand; Topic: Total Requirement by Occupation)

1. SDS (2024). Oxford Economics Forecasts.
* See RSA Technical Note (2024) for an explanation of what is defined as 'high-level', 'mid-level' and 'low-level' occupations.

Skills Development Scotland

For further information or queries on the RSAs or any of our other products, please contact: **RSA@sds.co.uk**