Skills Development Scotland

Regional Skills Assessment
Borders

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 the Borders, which covers the Scottish Borders local authority.

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**

Join us to get the latest insight and find out more about Regional Skills Assessments.

The Borders will be covered as part of the South of Scotland RSA webinar. Click here to book your place.

10am – 11am on 5th December 2024

You can also sign up for our webinars covering other regions and key sectors in Scotland.

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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]

Borders are part of the South of Scotland Regional Economic Partnership (REP). The South of Scotland Regional Economic Partnership oversees delivery of the Regional Economic Strategy (RES). The RES sets out a vision for a Green, Fair and Flourishing region and has identified six thematic priorities in achieving this:

- **Theme 1** – Skilled and Ambitious People
- **Theme 2** – Innovating and Enterprising
- **Theme 3** – Rewarding and Fair Work
- **Theme 4** – Cultural and Creative Excellence
- **Theme 5** – Green and Sustainable Economy
- **Theme 6** – Thriving and Distinct Communities

The Regional Economic Partnership has recently refreshed its delivery plan to focus on three *"grand challenges"* that are viewed as barriers to growth in the region:

- Transport;
- Housing; and
- Skills.

The REP has delegated responsibility to drive forward delivery of *Theme 1 – Skilled and Ambitious People* to the Education and Skills Strategic Coordination Group (ESSCG). The ESSCG has been focused on developing an understanding of the skills demands arising from the drive for Net Zero and is now using this to develop proposals for skills provision, which would support the South of Scotland's Net Zero ambitions. Partners analysis of demand has highlighted Forestry, Engineering and Construction as sectors likely to require increased skills provision in the coming years to respond to skills demand from the transition to net zero.

Such growth opportunities are clearly positive but are creating a concern among partners about the availability of labour to capitalise on such opportunities.

Reducing economic inactivity is one approach to resolving this tension – with Local Employability Partnerships in particular focused on supporting excluded groups back into the labour market.

Borders partners have stakes in the Borderlands Inclusive Growth Deal and the Edinburgh and South-East Scotland Growth Deal. The Borderlands Inclusive Growth Deal presents an opportunity for £7m of capital investment in skills infrastructure in the South of Scotland in the coming years – partners are currently developing proposals. The Edinburgh and South-East City Region Deal has a value of over £1.5b, with £25m allocated to delivery of the Integrated Employability and Skills Programme and a circa £29m investment at Borders Innovation Park.

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.

For example, the figures presented in this report do not reflect significant levels of investment expected in the region around achieving Net Zero, with Construction sector growth a possibility on the back of the retrofit of housing stock. Investments made at strategic employment sites such as the Borders Innovation Park are also likely to drive demand for skills in the coming years.

The forecasts should be used in conjunction with other sources, and readers are encouraged to overlay these with their own local knowledge.

Economic Performance[1]

Borders estimated GVA in 2024: **£2,533**m

The Borders was estimated to generate 1.7% of Scotland's output in 2024. This share of GVA ranked the region in the bottom quartile of RSA regions for GVA contribution to the Scottish economy.

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

Real Estate Activities[*]   **£519m**

Human Health and Social Work Activities   **£320m**

Professional, Scientific and Technical Activities   **£314m**

Wholesale and Retail Trade   **£238m**

GVA forecast average annual growth (2024-2027)

Borders: **1.3%**

Scotland: **1.4%**

GVA forecast average annual growth (2027-2034)

Borders: **1.0%**

Scotland: **1.3%**

Forecast Average Annual GVA Change by Industry (%), Borders

Industry	Mid-term (2024-2027)	Long-term (2027-2034)
Information and Communication	2.9%	2.6%
Electricity, Gas, Steam and Air Conditioning	2.4%	2.5%
Construction	2.2%	1.2%
Arts, Entertainment and Recreation	2.1%	1.3%
Administrative and Support Service Activities	1.7%	1.6%
Transportation and Storage	2.2%	1.1%
Other Service Activities	2.2%	0.9%
Accommodation and Food Service Activities	2.1%	1.0%
Professional, Scientific and Technical Activities	1.5%	1.2%
Agriculture, Forestry and Fishing	1.4%	1.2%
Human Health and Social Work Activities	1.3%	1.3%
Wholesale and Retail Trade	1.6%	1.0%
Water Supply	1.7%	0.6%
Real Estate Activities	0.7%	0.9%
Financial and Insurance Activities	0.7%	0.9%
Manufacturing	0.6%	0.5%
Education	0.4%	0.5%
Public Administration and Defence	0.1%	0.7%
Mining and Quarrying	-1.4%	-1.9%

● Mid-term (2024-2027) ● Long-term (2027-2034)

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

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 **the Borders** was estimated to be **£49,700** in 2024. In comparison, the Scottish average was estimated to be £52,000.

Mid-term Productivity

From 2024 to 2027, productivity in the Borders 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%.

Borders forecast productivity in 2027: **£50,500**

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

Long-term Productivity

From 2027 to 2034, productivity in the Borders 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%.

Borders forecast productivity in 2034: **£54,100**

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

Productivity (2024)

Region	Productivity
West Lothian	£64,000
Edinburgh, East and Midlothian	£60,600
Aberdeen City and Shire	£54,800
Forth Valley	£53,200
Scotland	£52,000
Lanarkshire	£51,400
Fife	£50,900
Dumfries and Galloway	£50,100
South of Scotland	£49,900
Borders	£49,700
Glasgow College Region	£49,200
Tayside	£47,300
Highlands and Islands	£46,500
West Region	£45,900
Ayrshire	£44,600

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

Regional Employment[1]

Workforce Size 2024:
51,600 people

The region's workforce was estimated to account for **2.0%** of Scottish employment.

Over the last 10 years (2014-2024), regional employment was estimated to have **declined** by **0.5%** (**-300** people). In comparison, employment in Scotland increased by 3.8%.

Workforce Size 2027:
52,500 people

The region's workforce is forecast to **grow** by **1.7%** or **900** people between 2024 and 2027.

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

Workforce Size 2034:
52,600 people

The region's workforce is forecast to **grow** by **0.3%** or **100** 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), Borders

51,900 46,800 49,100 46,600 52,000 51,600 52,500 52,700 52,700 52,600

2014 2017 2021 2024 2025 2027 2030 2034
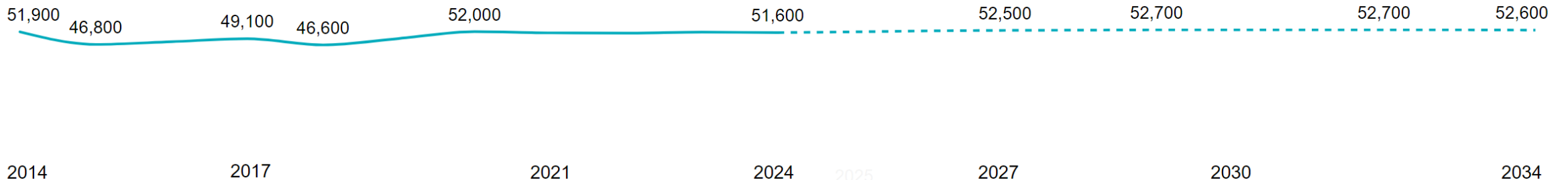
For data on employment and forecast employment at local authority level please see the Data Matrix.
(Theme: Skills Demand; Topic: Employment Forecast)

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
9,900

Wholesale and Retail Trade
6,600

Education
4,700

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 Wholesale and Retail Trade, with 200 more people by 2027. While Manufacturing is forecast to have the greatest employment contraction (-200 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 400 more people by 2034. While Manufacturing is forecast to have the greatest employment contraction (-700 people) in the long-term.

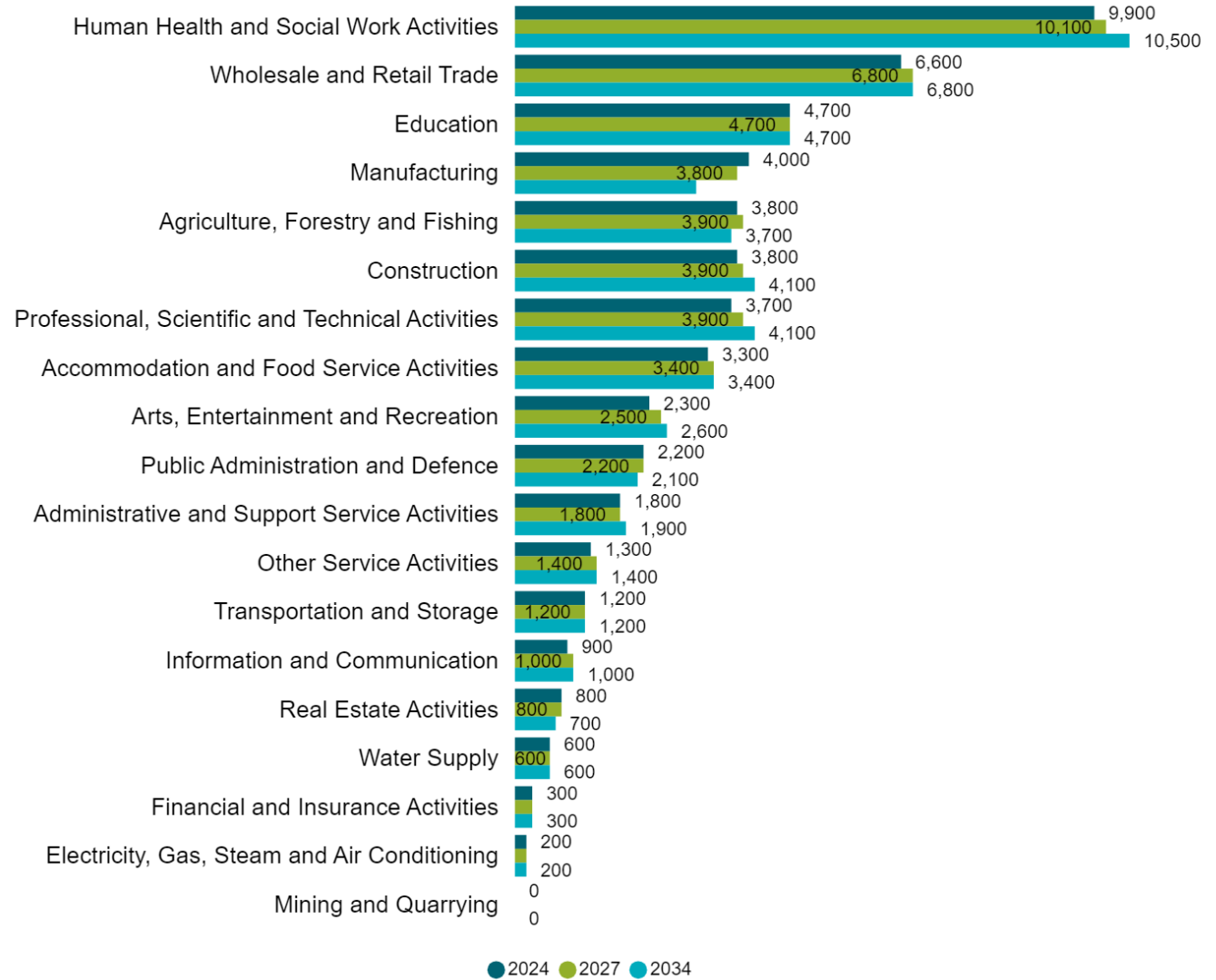In 2024, the Manufacture of Wearing Apparel was estimated to be the region's greatest specialism, with the percentage of employment in this industry 13.7 times greater than the Scottish average. The second largest specialism was estimated to be Forestry and Logging (5.9 times greater in the region than the Scottish average).

Figures may not sum due to rounding.

Employment by Industry, Borders

Industry	2024	2027	2034
Human Health and Social Work Activities	9,900	10,100	10,500
Wholesale and Retail Trade	6,600	6,800	6,800
Education	4,700	4,700	4,700
Manufacturing	4,000	3,800	3,800
Agriculture, Forestry and Fishing	3,800	3,900	3,700
Construction	3,800	3,900	4,100
Professional, Scientific and Technical Activities	3,700	3,900	4,100
Accommodation and Food Service Activities	3,300	3,400	3,400
Arts, Entertainment and Recreation	2,300	2,500	2,600
Public Administration and Defence	2,200	2,200	2,100
Administrative and Support Service Activities	1,800	1,800	1,900
Other Service Activities	1,300	1,400	1,400
Transportation and Storage	1,200	1,200	1,200
Information and Communication	900	1,000	1,000
Real Estate Activities	800	800	700
Water Supply	600	600	600
Financial and Insurance Activities	300	300	
Electricity, Gas, Steam and Air Conditioning	200	200	
Mining and Quarrying	0	0	

● 2024 ● 2027 ● 2034

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
3,900

Health Professionals
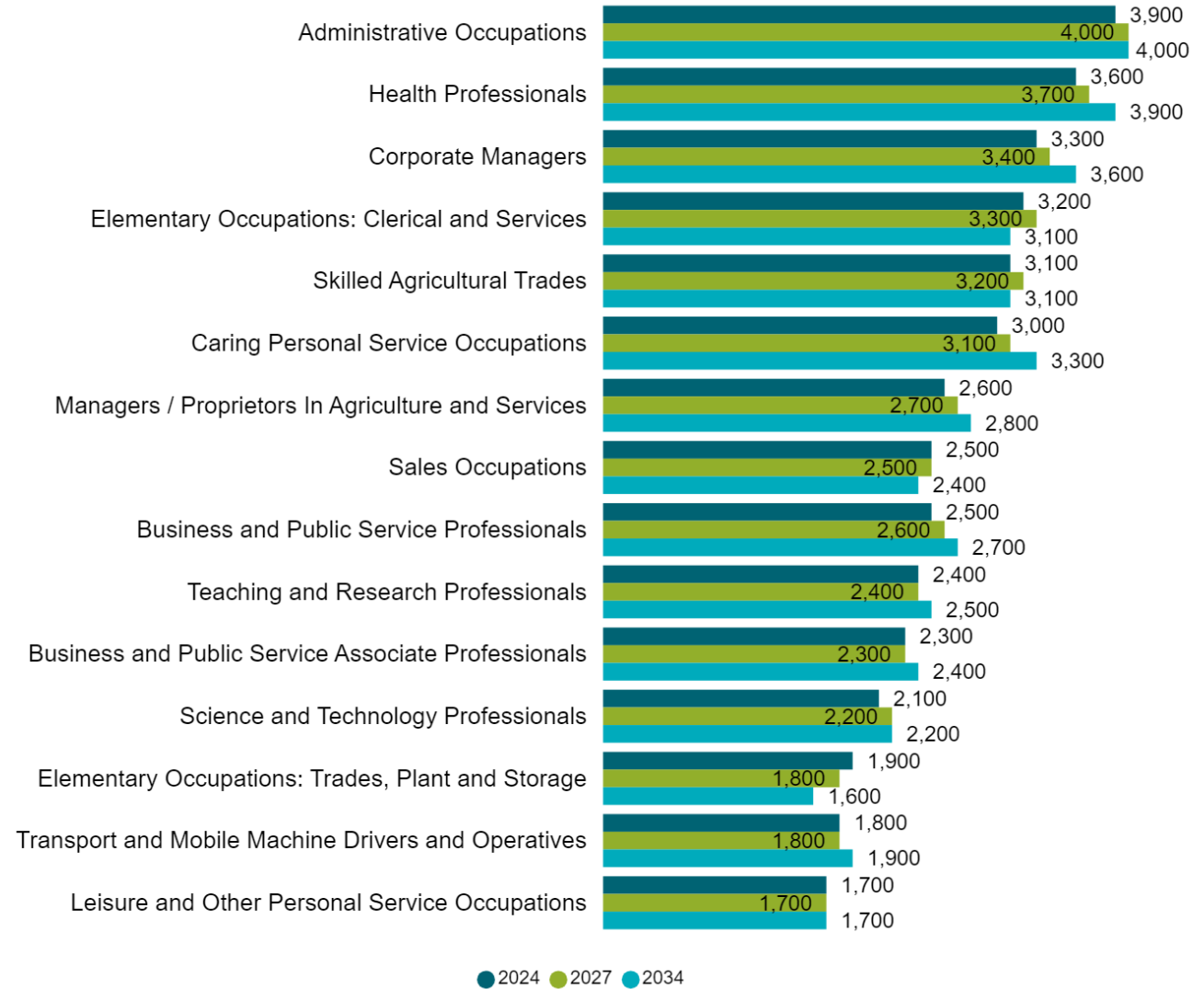**3,600**

Corporate Managers
3,300

In 2024, 44.6% 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 33.2% of the workforce, which was a higher percentage of the workforce than Scotland (27.0%). Around 22.1% of people were employed in 'lower-level' occupations, which was a lower percentage of the workforce than Scotland (23.8%).

Between 2024 and 2027, the greatest growth is forecast to be in Corporate Managers (100 people). While Elementary Occupations: Trades, Plant and Storage is likely to experience the greatest contraction (less than 50 people).

Over the long-term between 2027 and 2034, the greatest growth is forecast to be in Corporate Managers (200 people). While Elementary Occupations: Trades, Plant and Storage is likely to experience the greatest contraction (-200 people).

Figures may not sum due to rounding.

Employment by Top 15 Occupations, Borders

Occupation	2024	2027	2034
Administrative Occupations	3,900	4,000	4,000
Health Professionals	3,600	3,700	3,900
Corporate Managers	3,300	3,400	3,600
Elementary Occupations: Clerical and Services	3,200	3,300	3,100
Skilled Agricultural Trades	3,100	3,200	3,100
Caring Personal Service Occupations	3,000	3,100	3,300
Managers / Proprietors In Agriculture and Services	2,600	2,700	2,800
Sales Occupations	2,500	2,500	2,400
Business and Public Service Professionals	2,500	2,600	2,700
Teaching and Research Professionals	2,400	2,400	2,500
Business and Public Service Associate Professionals	2,300	2,300	2,400
Science and Technology Professionals	2,100	2,200	2,200
Elementary Occupations: Trades, Plant and Storage	1,900	1,800	1,600
Transport and Mobile Machine Drivers and Operatives	1,800	1,800	1,900
Leisure and Other Personal Service Occupations	1,700	1,700	1,700

● 2024 ● 2027 ● 2034

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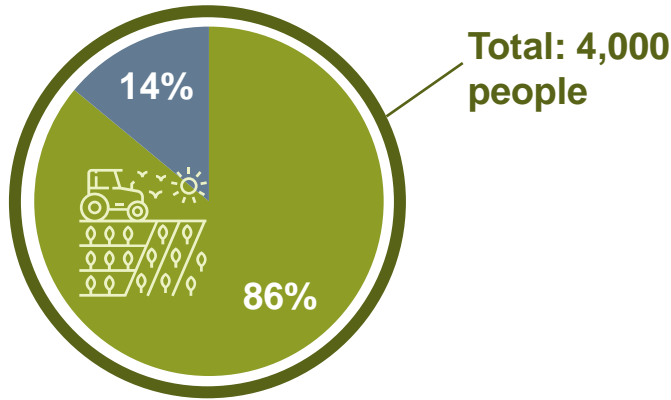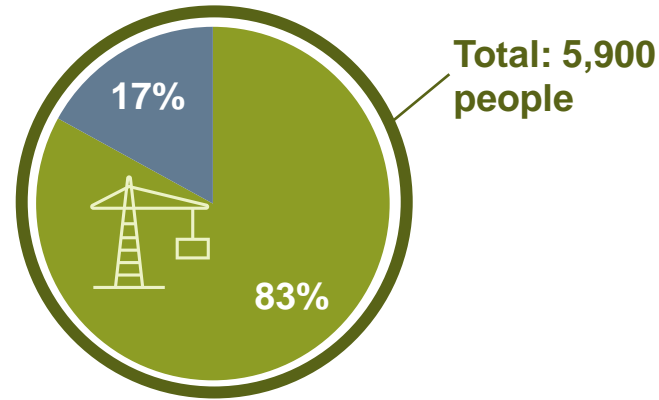*(Theme: Skills Demand; Topic: Employment Forecast by Occupation)*

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 the Borders in 2024.**

Agriculture

14%

86%

Total: 4,000 people

Construction

17%

83%

Total: 5,900 people

Manufacturing (with Engineering)

38%

62%

Total: 3,700 people

Green Jobs

Non-Green Jobs
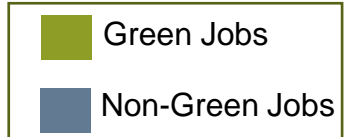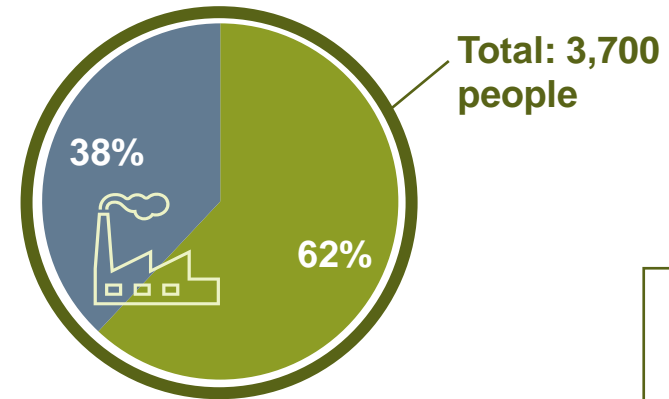
Energy and Waste Treatment

36%

64%

Total: 1,700 people

Transport

47%

53%
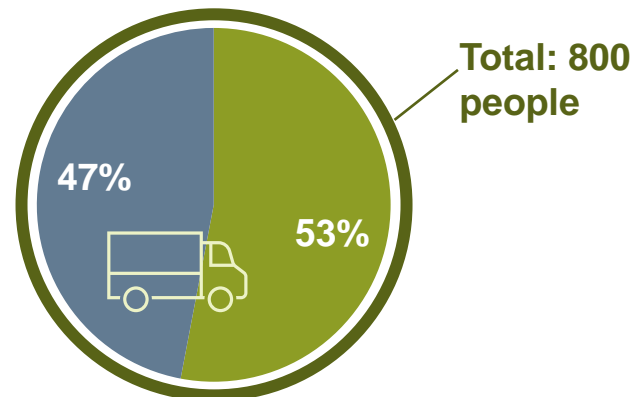
Total: 800 people

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 Borders region was estimated to account for **2% of Scotland's total** (or 16,100 people). Of the sectors of most importance to the transition, Construction was the largest employing sector (37%) in the region.

Figures may not sum due to rounding.

Job Postings in the Borders[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 March 2022. In the Borders, the peak in job postings occurred slightly earlier in late 2021. 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 the Borders remain above pre-pandemic levels (January 2019).

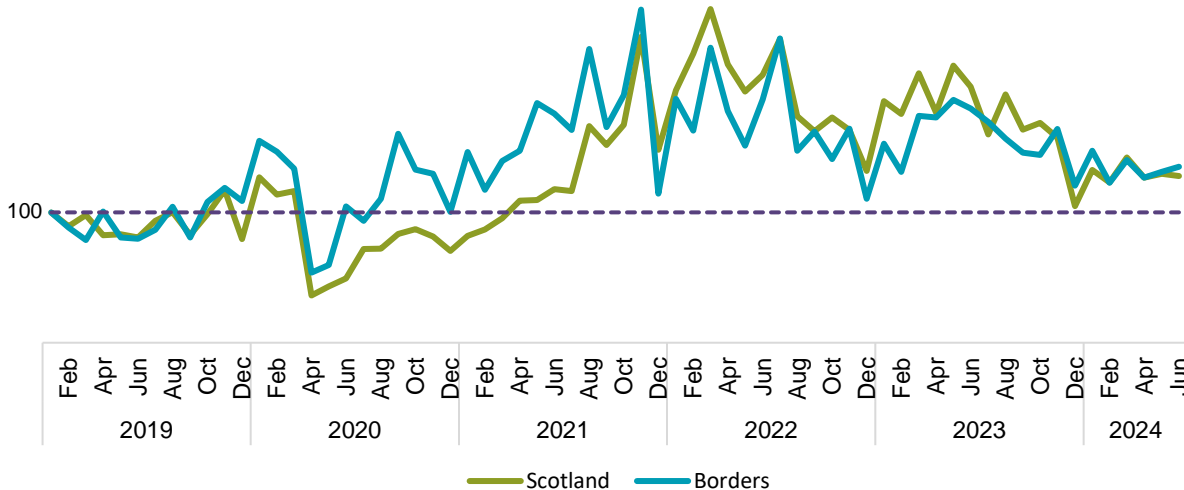In the first six months of 2024, there has been sustained demand for workers in the region. Job postings in the Borders accounted for 0.9% of Scotland's total job postings between January and June 2024.

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

Legend: Scotland · Borders

Between January and June 2024, there were **2,200 job postings** in the **Borders,** of which:

The locations with the most jobs advertised were:

Galashiels
500 postings

Peebles
300 postings

Melrose
300 postings

The most requested skills and knowledge were:

Communications

Management

Customer Service

Teaching
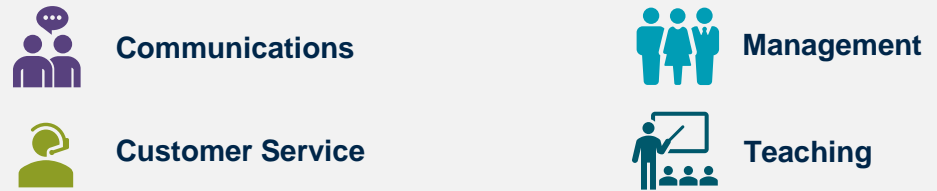
The top job postings were:

Occupation	Postings
Care Workers and Home Carers	130
Social Workers	80
Other Registered Nursing Professionals	70
Cleaners and Domestics	70
Special and Additional Needs Education Teaching Professionals	60
Sales and Retail Assistants	60
Secondary Education Teaching Professionals	60
Sales Related Occupations n.e.c.	60
Managers and Directors in Retail and Wholesale	50
Teaching Professionals n.e.c.	30

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 the Borders[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 2,200 job postings in the Borders between January and June 2024, **a third of them, 700, were for green jobs (33.6%)**. 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 0.7% of all green job postings in Scotland. The demand for green jobs in the region peaked in late 2021 before cooling. However, demand for green jobs in the region remains above the pre-pandemic level.

Between January and June 2024, **two thirds of green job postings** in the Borders were for Enhanced Skills and Knowledge roles.

66%	23%	12%
Enhanced Skills and Knowledge	Increased Demand	New and Emerging
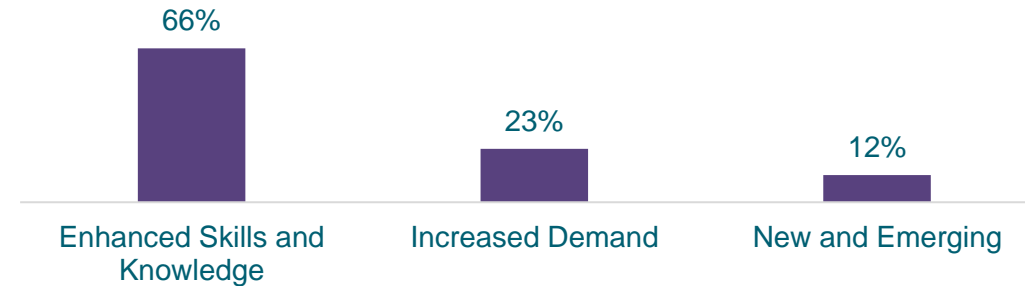
The green jobs in demand in each category between January and June 2024 included:

Enhanced Skills and Knowledge:

Vehicle Technicians, Mechanics and Electricians

Increased Demand:

Large Goods Vehicle Drivers

New and Emerging:

Engineering Technicians

The median advertised salary for **green jobs** in the Borders was **£35,000*** in the first six months of 2024.

This was higher than the median advertised salary for all jobs in the region which was £30,000**.

More information on the CESAP Pathfinder can be found here.

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 the Borders. 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 **5,900** people in **the Borders**. Between 2024 and 2027, replacement demand could create the need for **5,000** people, while **positive** expansion demand is forecast to result in **900 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.

=

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

+

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

Borders: **5,900** people

Borders: **5,000** people

Borders: **900** people

Scotland: **370,800** people

Scotland: **321,000** people

Scotland: **49,800** people

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

SCQF 11-12	SCQF 7-10	SCQF 6	SCQF 5	SCQF 1-4	No qualifications
500	2,800	900	1,200	100	400
8%	48%	16%	20%	1%	6%

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)

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

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

Wholesale and Retail Trade
1,100

Agriculture, Forestry and Fishing
900

Human Health and Social Work Activities
800

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), Borders

Industry	Expansion demand	Replacement demand
Wholesale and Retail Trade	200	1,000
Agriculture, Forestry and Fishing		900
Human Health and Social Work Activities	200	600
Accommodation and Food Service Activities	100	500
Education		500
Arts, Entertainment and Recreation	100	300
Construction	100	300
Administrative and Support Service Activities	100	200
Transportation and Storage		200
Public Administration and Defence		200
Water Supply		200
Professional, Scientific and Technical Activities	200	
Other Service Activities	100	
Information and Communication		
Electricity, Gas, Steam and Air Conditioning		
Mining and Quarrying		
Financial and Insurance Activities		
Real Estate Activities		
Manufacturing	-200	200

● Expansion demand   ● Replacement demand

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

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

Teaching and Research Professionals
600

Skilled Agricultural Trades
600

Elementary Occupations: Clerical and Services
500

As mentioned, there is forecast to be a total requirement for 5,900 people in the region over the mid-term. 'Higher-level' occupations* are forecast to account for 43.5% of this total requirement, followed by 33.7% in 'mid-level' occupations and 22.7% 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), Borders

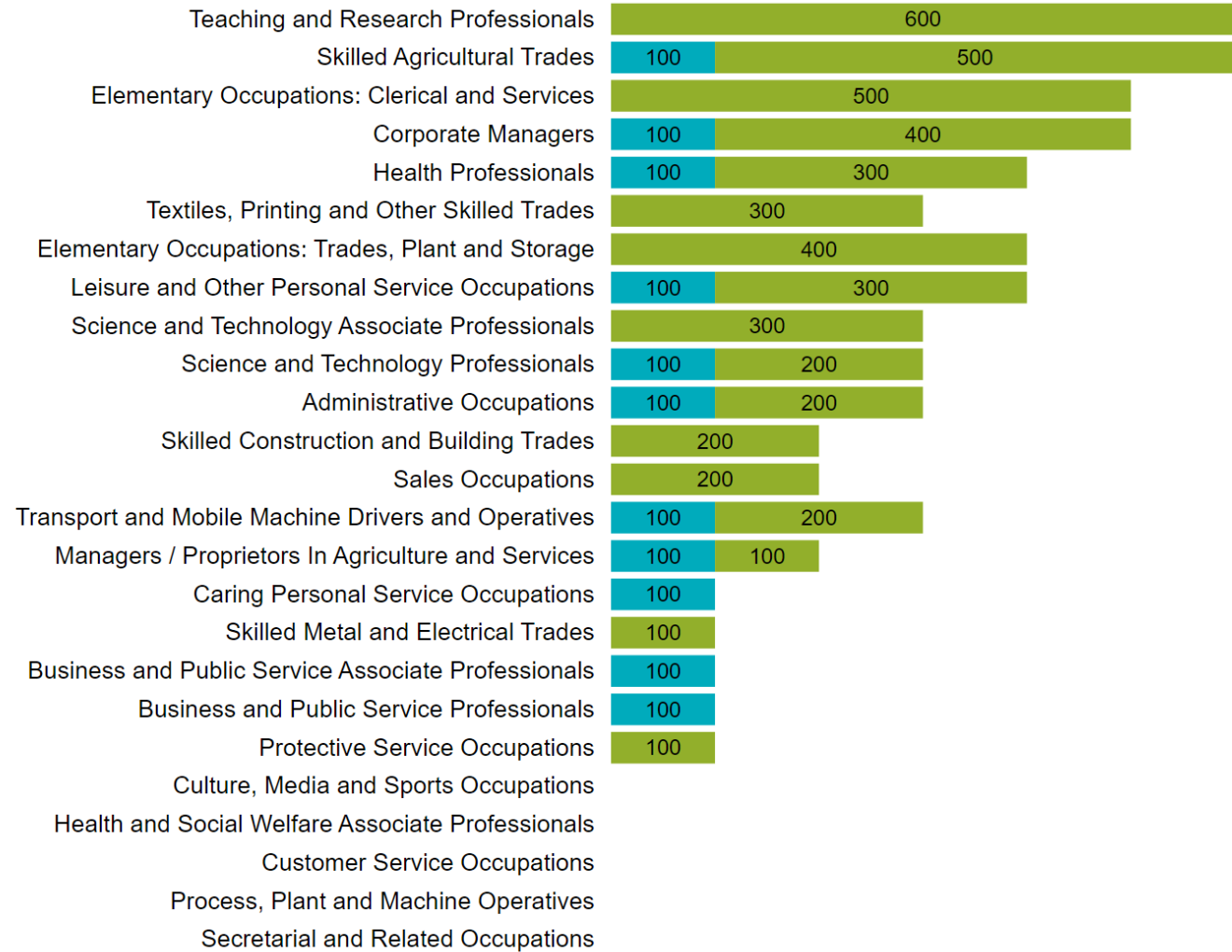| Occupation	Expansion demand	Replacement demand
Teaching and Research Professionals		600
Skilled Agricultural Trades	100	500
Elementary Occupations: Clerical and Services		500
Corporate Managers	100	400
Health Professionals	100	300
Textiles, Printing and Other Skilled Trades		300
Elementary Occupations: Trades, Plant and Storage		400
Leisure and Other Personal Service Occupations	100	300
Science and Technology Associate Professionals		300
Science and Technology Professionals	100	200
Administrative Occupations	100	200
Skilled Construction and Building Trades		200
Sales Occupations		200
Transport and Mobile Machine Drivers and Operatives	100	200
Managers / Proprietors In Agriculture and Services	100	100
Caring Personal Service Occupations	100	
Skilled Metal and Electrical Trades		100
Business and Public Service Associate Professionals	100	
Business and Public Service Professionals	100	
Protective Service Occupations		100
Culture, Media and Sports Occupations		
Health and Social Welfare Associate Professionals		
Customer Service Occupations		
Process, Plant and Machine Operatives		
Secretarial and Related Occupations		

● Expansion demand   ● Replacement demand

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 the Borders, 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 **12,300** people in **the Borders**. Between 2027 and 2034, replacement demand could create the need for **12,100** people, while **positive** expansion demand is forecast to result in **100 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.

=

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

+

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

Borders: **12,300** people

Borders: **12,100** people

Borders: **100** people

Scotland: **788,900** people

Scotland: **756,900** people

Scotland: **32,000** people

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

SCQF 11-12	SCQF 7-10	SCQF 6	SCQF 5	SCQF 1-4	No qualifications
1,000	6,100	1,900	2,600	-100	800
8%	50%	16%	21%	-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)

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

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

Wholesale and Retail Trade
2,300

Human Health and Social Work Activities
1,900

Agriculture, Forestry and Fishing
1,800

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), Borders
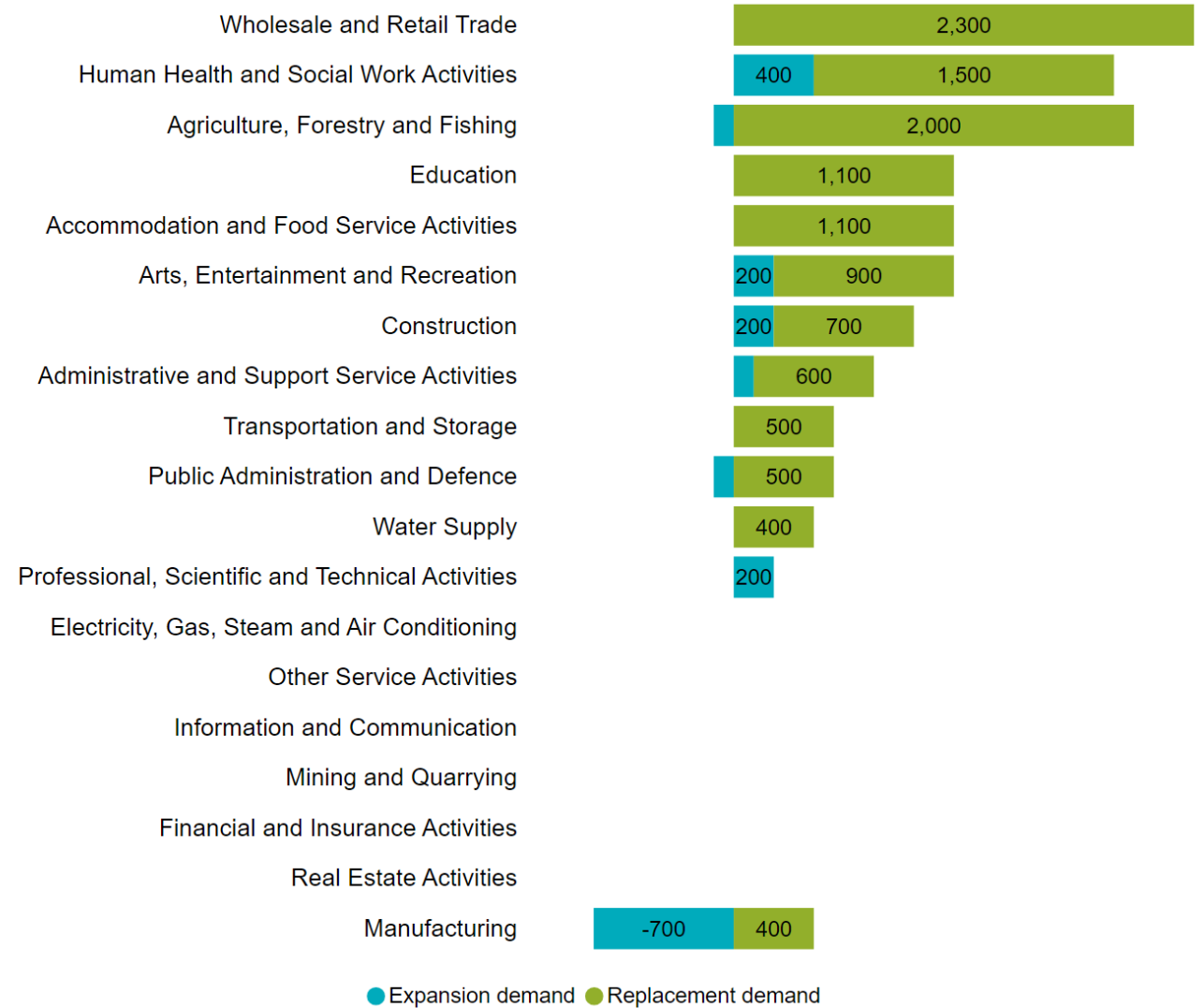
Industry	Expansion demand	Replacement demand
Wholesale and Retail Trade		2,300
Human Health and Social Work Activities	400	1,500
Agriculture, Forestry and Fishing		2,000
Education		1,100
Accommodation and Food Service Activities		1,100
Arts, Entertainment and Recreation	200	900
Construction	200	700
Administrative and Support Service Activities		600
Transportation and Storage		500
Public Administration and Defence		500
Water Supply		400
Professional, Scientific and Technical Activities	200	
Electricity, Gas, Steam and Air Conditioning		
Other Service Activities		
Information and Communication		
Mining and Quarrying		
Financial and Insurance Activities		
Real Estate Activities		
Manufacturing	-700	400

● Expansion demand   ● Replacement demand

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

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

Teaching and Research Professionals
1,400

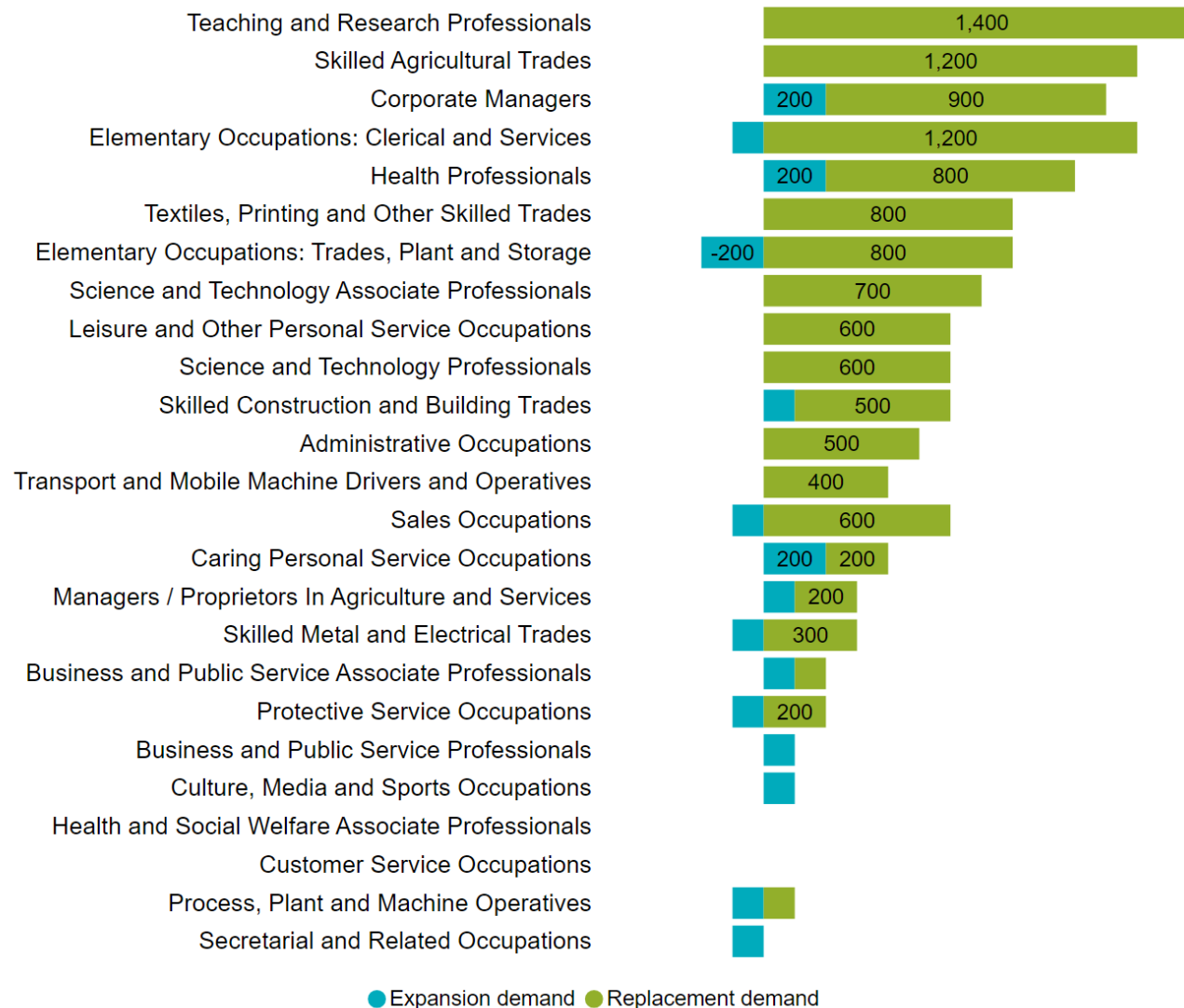**Skilled Agricultural Trades**
1,100

Corporate Managers
1,100

There is forecast to be a total requirement for 12,300 people in the region over the long-term. 'Higher-level' occupations* are forecast to account for 45.3% of this total requirement, followed by 33.7% in 'mid-level' occupations and 20.9% 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), Borders

Occupation	Expansion demand	Replacement demand
Teaching and Research Professionals		1,400
Skilled Agricultural Trades		1,200
Corporate Managers	200	900
Elementary Occupations: Clerical and Services		1,200
Health Professionals	200	800
Textiles, Printing and Other Skilled Trades		800
Elementary Occupations: Trades, Plant and Storage	-200	800
Science and Technology Associate Professionals		700
Leisure and Other Personal Service Occupations		600
Science and Technology Professionals		600
Skilled Construction and Building Trades		500
Administrative Occupations		500
Transport and Mobile Machine Drivers and Operatives		400
Sales Occupations		600
Caring Personal Service Occupations	200	200
Managers / Proprietors In Agriculture and Services		200
Skilled Metal and Electrical Trades		300
Business and Public Service Associate Professionals		
Protective Service Occupations		200
Business and Public Service Professionals		
Culture, Media and Sports Occupations		
Health and Social Welfare Associate Professionals		
Customer Service Occupations		
Process, Plant and Machine Operatives		
Secretarial and Related Occupations		

● Expansion demand ● Replacement demand

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.

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