

Board Meeting

Date of Meeting	Monday 29 October, 2018
Paper Title	2018 Glasgow Regional Skills Assessment
Agenda Item	18
Paper Number	BM1-R
Responsible Officer	Robin Ashton, GCRB Executive Director
Status	Disclosable
Action	For Consideration and Comment

1. Report Purpose

1.1 Provide for member discussion, the 2018 Glasgow Regional Skills Assessment.

2. Recommendations

2.1 The Board is invited to:

- **consider** the attached 2018 Glasgow Regional Skills Assessment and curriculum supply information; and
- **contribute** views on the alignment of training supply to skills demand and employment needs to support the development of the 2019-20 Regional Outcome Agreement.

3. 2018 Glasgow Regional Skills Assessment

3.1 Regional Skills Assessments (RSAs) were first launched by Skills Development Scotland (SDS) in 2014 to provide a robust evidence base to support colleges in strategic skills investment planning.

3.2 The 2018 RSA for Glasgow was published in October 2018 and attached as Annex A are an infographic detailing key data for the Glasgow Region area, and a summary report outlining demand for skills including evidence on current and forecast data on the economy and employment.

3.3 The attached Glasgow RSA highlights the following aspects:

- The Glasgow Region economy is forecast to outperform the Scottish average over the next decade;

- Growth is expected to be driven by Glasgow Region's dominant private services sector;
- Productivity in Glasgow Region is below the Scottish average;
- The service sector dominates the Glasgow Region's economy. The largest sectors by employment are human health and social work, administrative and support services, and wholesale and retail;
- Workers in Glasgow Region are more likely to be in service sector occupations than the Scottish average;
- Employment growth in the Glasgow Region is expected to outpace Scotland in both the short and medium term;
- Full-time employment is expected to add more jobs than part-time employment;
- Almost half of all jobs in the region in 2018 were in 'higher level' occupations;
- In Glasgow Region, the largest job increases are expected to be in administration and support services and professional, scientific and technical activities;
- The construction key sector is expected to enjoy the strongest growth over the next decade;
- The changing profile of jobs in Glasgow is expected to boost service-based occupations;
- There are expected to be 222,800 job openings in Glasgow Region between 2018 and 2028, driven by both expansion and replacement demand. Employment growth is expected to result in 32,600 job openings over the next decade. Replacement demand, which captures people leaving the labour market or moving between occupations, is expected to result in a further 190,200 openings over the next ten years;
- The population of the region is forecast to increase over the coming decades, with an increase of almost 71,000 people expected between 2016 and 2041.

3.4 SDS also provide a detailed data matrix that includes key indicators for skills planning and this is available at: <https://www.skillsdevelopmentscotland.co.uk/what-we-do/skills-planning/regional-skills-assessments/>

3.5 As part of regional curriculum review activity related to the 2019-20 Regional Outcome Agreement, the attached Glasgow Regional Skills Assessment was reviewed by members of the regional Learning and Teaching Group and the Glasgow Region Curriculum Hubs at a curriculum review event organised by GCRB in early October, 2018. This provided an opportunity for joint consideration and discussion of current skills training supply and economic and employment demand information.

- 3.6** Annex B provides an overview of the curriculum supply information provided to regional curriculum hubs and GCRB Board members are invited to **discuss** this and **contribute their views** on the alignment of training supply to skills demand and employment needs to support the development of the 2019-20 Regional Outcome Agreement.
- 3.7** The GCRB Executive Director will integrate Board member views into ongoing work with college and SDS staff to develop a high level curriculum plan for the 2019-20 Regional Outcome Agreement.

4. Risk Analysis

- 4.1** Use of the Regional Skills Assessment in curriculum planning mitigates against *GCRB Risk 001: Poor environment scanning, and scenario planning, results in a failure to respond proactively to macro-level changes* and *GCRB Risk 005: A failure to effectively plan/monitor our educational delivery results in the curriculum not meeting regional economic and social needs.*

5. Legal Implications

- 5.1** No legal implications are identified.

6. Equalities Implications

- 6.1** No equalities implications are identified.

7. Financial Implications

- 7.1** No financial implications are identified, however, curriculum planning is closely aligned to the allocation of Credit funding.

8. Strategic Plan Implications

- 8.1** Use of Regional Skills Assessment information in planning and funding of the Glasgow Regional curriculum supports the Board in delivering the overarching aim of the Glasgow Region Strategic Plan for College Education to collectively build Scotland's most inclusive, responsive and effective college system.

The Regional Skills Assessments (RSAs) are a single, agreed evidence base on which to base future investment in skills. The infographic below is designed to support the Glasgow RSA Summary report, using Oxford Economics forecasts* over the period 2018-2028 to show current and future economic contribution as well as current and future demand for skills.

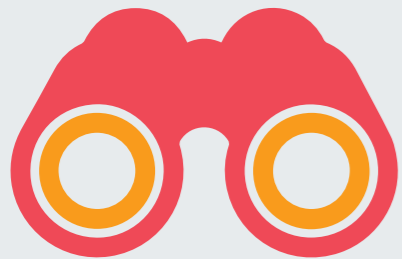
The Economy



Gross Value Added (GVA)¹ in 2018

Total **regional** GVA is:
£23,598m

18%
of total **Scottish** output



Forecast² annual growth (2018-2028)³:

Glasgow: 2.0%
Scotland: 1.6%
United Kingdom: 1.9%



Productivity (GVA per job) in 2018

Regional productivity is:
£46,000

Compared to **national** productivity of:
£47,300



Forecast annual growth (2018-2028)

Glasgow: 1.3%
Scotland: 1.3%
United Kingdom: 1.4%

Current Demand for Skills (2018)



Total Employment⁴ in 2018

513,100 jobs



Total employment between 2008 and 2018:

up by 1% or 4,100 jobs

Compared to a **national increase of 2%**

Sectoral Employment

Top 3 employing sectors in 2018:



Human health
& social work
(84,400 jobs)



Admin
& support
services
(64,900 jobs)



Wholesale
& retail
(62,500 jobs)

Employment by Occupation (people)

This is what the occupational structure⁵ looks like in 2018:

48%
Higher level
occupations



27%
Mid-level
occupations



24%
Lower level
occupations



* As with all forecasts, certain caveats need to be applied. They are based on what we know now and include past and present trends projected into the future. Their value is in identifying likely directions of travel rather than predicting exact figures. It is recommended therefore that users examine trends over time rather than focusing on changes in individual years. Finally, the more disaggregated they become, especially at smaller geographical units, the less reliable they are likely to be.

¹ GVA is the measure of the value of goods and services produced within the economy.
² Forecasts by Oxford Economics (unless

otherwise stated).
³ Data for 2019 to 2028 used as 2018 is based on the change between 2017-18. Please see RSAs and Technical

Note for more details.
⁴ Measured by total number of jobs.
⁵ 'Higher level occupations' are defined as Managers, directors &

senior officials, Professional occupations, and Associate professional & technical occupations; 'Mid level occupations' defined

as Administrative & secretarial occupations, Skilled trades occupations, Caring, leisure and other service occupations; and 'Lower level

occupations' defined as Sales & customer service occupations, Process, plant & machine operatives, Elementary occupations.

The Regional Skills Assessments (RSAs) are a single, agreed evidence base on which to base future investment in skills. The infographic below is designed to support the Glasgow RSA Summary report, using Oxford Economics forecasts* over the period 2018-2028 to show current and future economic contribution as well as current and future demand for skills.

Future Supply

Population 2016-2028⁶

Total population between 2016-2028:

up by 5% or 42,100 people

Forecast change:

Glasgow: 5%

Scotland: 4%

United Kingdom: 6%

The working age population (16-64) between 2016-2028:

up by 0.8% or 4,700 people

Forecast change:

Glasgow: 0.8%

Scotland: -1%

United Kingdom: 8%

Job Openings (2018-2028)

Between 2018-2028 there will be a:

Total requirement for 222,800 people

Expansion demand:⁷

Replacement demand

32,600 people

190,200 people

This is what actual job openings within the total employment structure look like over the next 10 years:

49%
Higher level occupations



22%
Mid-level occupations



29%
Lower level occupations



Future Demand for Skills (2018-2028)

Total Employment 2018-2028⁸

7% or 34,100 jobs

Forecast average annual change:

Glasgow: 0.6%

Scotland: 0.3%

United Kingdom: 0.4%



Top 3 employing sectors in 2028 are forecast to be:



Human health & social work (88,100 jobs)



Admin & support services (76,700 jobs)



Wholesale & retail (66,400 jobs)

Between 2018-2028

The largest employment growth is forecast in:



Admin & support services (18%)



Construction (18%)



Professional, scientific & technical (16%)

The largest employment decreases are forecast in:



Mining & quarrying (-26%)



Manufacturing (-14%)



Public admin. & defence (-10%)

⁶ Source: National Records of Scotland.
⁷ i.e. the number of jobs across the region is forecast to decrease over the period due to contraction of the economy. 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. Some figures may not sum due to rounding.

⁸ Throughout this section, figures for 2018 - 2028 use 2018 to 2028 data as per Oxford Economics

calculations. Please see RSAs and Technical Note for more details.

Annex B: 2018 Curriculum Review: Curriculum Hub Initial Discussion Paper

Introduction/Context

A key aim of regional curriculum planning is to ensure that the combined regional offer continues to meet identified economic and social needs. This paper is provided to prompt discussion with members of the regional Learning and Teaching Group and Curriculum Hubs on this curriculum alignment.

To aid evaluation, the curriculum has been grouped into six 'sectors', most related to employment areas, with one related to access and supported learning (i.e. learning activity at levels 1-3, ESOL and supported learning programmes). Annex A provides a more detailed description of the defined sectors.

The first tables describe Credit and enrolment activity across the Glasgow College Region for each of these sectors, according to both the mode and level of study offered, and the volumes of activity/enrolments in employment sub-sectors. All data relates to 2016-17 delivery.

The following tables provide an overview of post-course destinations for full-time successful learners, both in terms of destination category, and in terms of the employment sector destination for those moving into work.

The final table provided shows a comparison between shares of employment per sector and relative levels of full-time enrolments (for courses at SCQF 6+). Further information on employment demand is provided in Skills Development Scotland regional skills assessment information available at:

<https://www.skillsdevelopmentscotland.co.uk/what-we-do/skills-planning/regional-skills-assessments/>

The curriculum hubs are asked to consider current training supply levels in the context of current and future skills demand and employment needs, and to discuss how well the curriculum offered meets these needs. In particular, are there employment areas where sufficient training supply is not available, or where situations where the combined training supply offer exceeds employment demand?

List of tables:

Page 2: Credits by Level of Study levels, Credits by Mode and Level, and Credits by Economic Sector

Page 3: Credits by mode/level per economic sector

Page 4: Credits volumes/proportions per employment sub-groupings

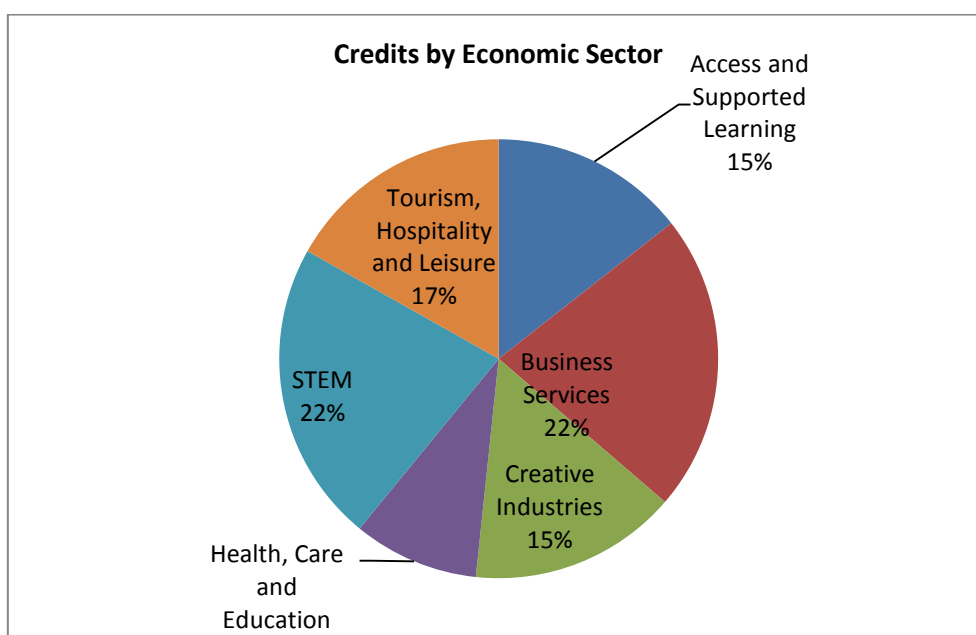
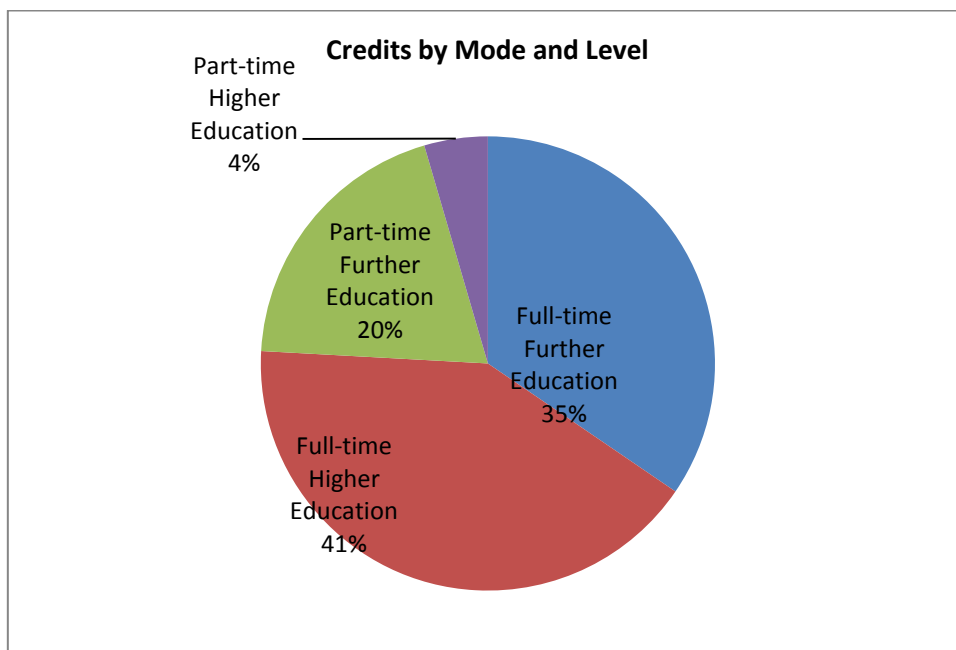
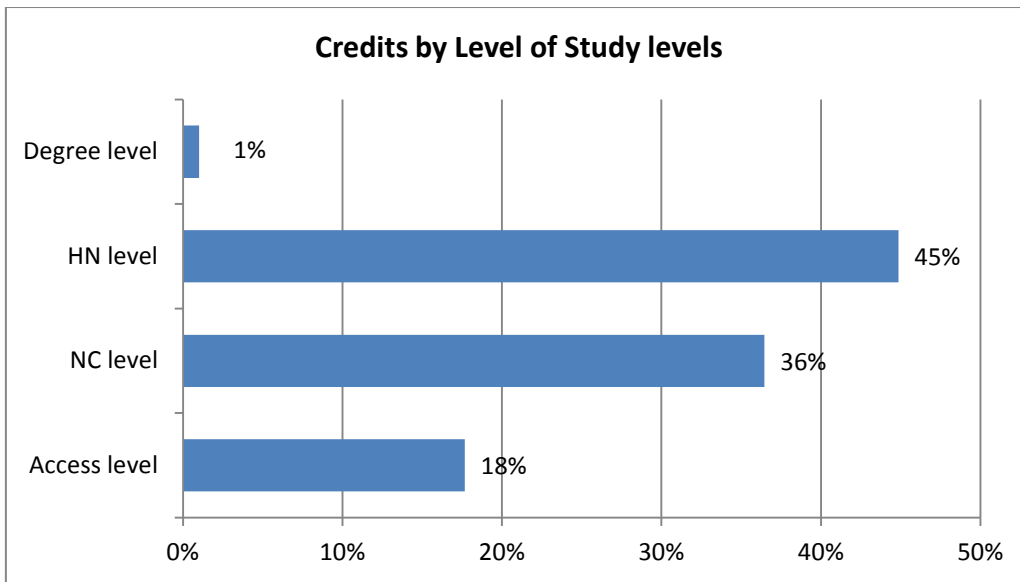
Pages 5-7: HNC/D enrolments per employment sub-groupings

Page 8: Part-time Higher Education Enrolments

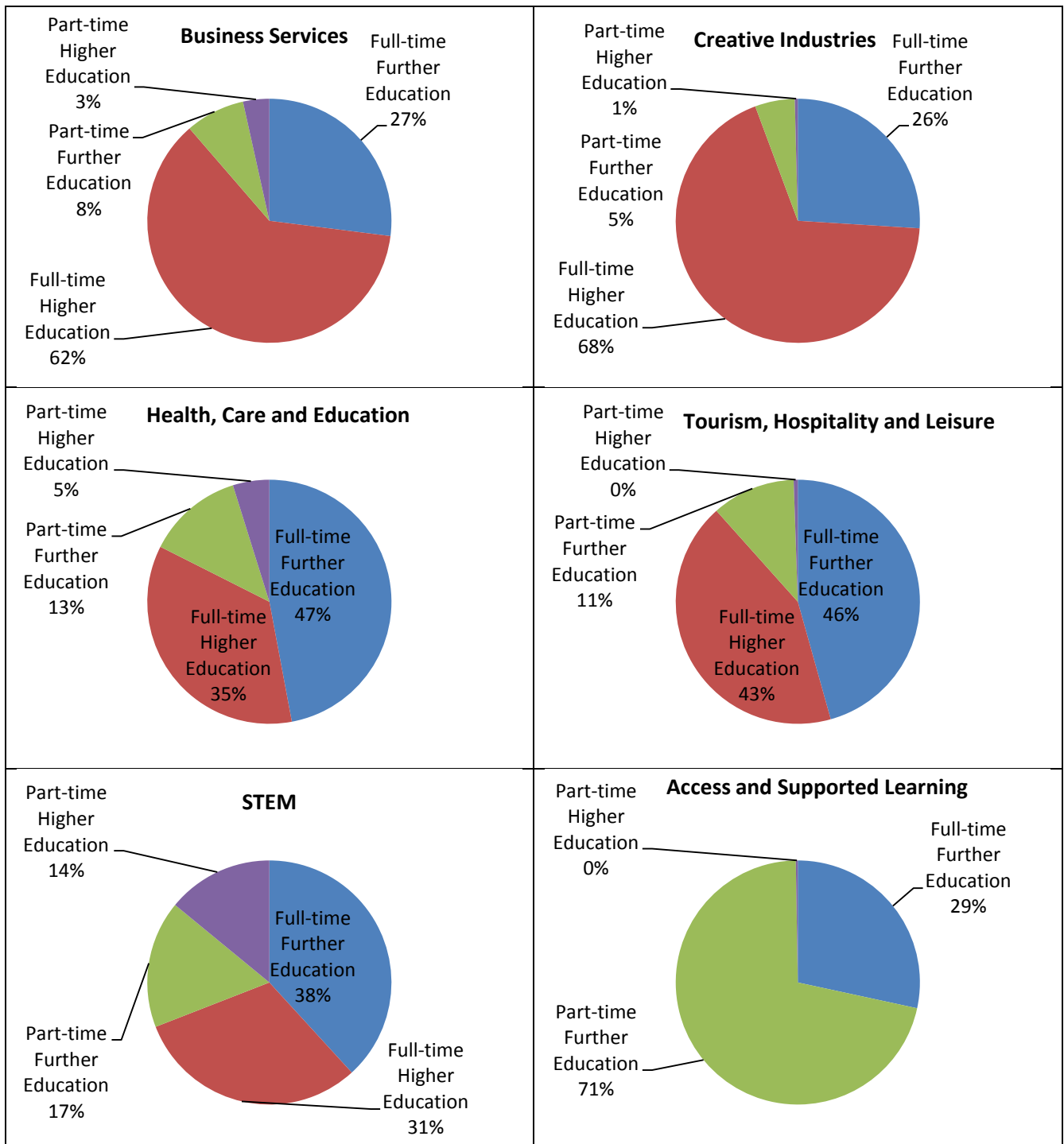
Page 9: Post Course Destinations of Full-Time Successful Learners

Page 10: Employment destinations of FT successful completers

Page 11: Comparison between sector employment shares and full-time enrolment volumes (SCQF 6+)



Credits by mode/level per economic sector



Credits volumes/proportions per employment sub-groupings

Employment Sectors	Credits	% of total
Access and Supported Learning		
Art and design	424	0.1%
Care	235	0.1%
Computing and ICT	9,135	2.3%
Construction	507	0.1%
Education and training	369	0.1%
Hairdressing, Beauty and Complementary Therapies	23	0.0%
Hospitality and tourism	448	0.1%
Languages and ESOL	28,849	7.4%
Media	23	0.0%
Science	0	0.0%
Social subjects	337	0.1%
Special Programmes	15,763	4.0%
Sport and Leisure	3	0.0%
Business Services		
Business, management and administration	45,261	11.6%
Care	1,360	0.3%
Computing and ICT	24,678	6.3%
Social subjects	14,050	3.6%
Creative Industries		
Art and design	36,819	9.5%
Media	12,533	3.2%
Performing arts	10,444	2.7%
Health, Care and Education		
Care	35,458	9.1%
Education and training	623	0.2%
STEM		
Construction	30,214	7.8%
Engineering	32,015	8.2%
Land-based industries	2,591	0.7%
Nautical studies	9,123	2.3%
Science	12,662	3.3%
Tourism, Hospitality and Leisure		
Hairdressing, Beauty and Complementary Therapies	24,524	6.3%
Hospitality and tourism	22,946	5.9%
Sport and Leisure	18,123	4.7%
All Credits	389,539	

HNC/D enrolments per employment sub-groupings

Row Labels	Count of Student matriculation number
Access and Supported Learning	431
Education and training	6
Career Change/Access	6
Languages and ESOL	425
Languages	425
Business Services	4,838
Business, management and administration	2,998
Business/Finance (general)	928
Financial Management/Accounting	557
Human Resources Management	246
International Business Studies/Briefings	12
Law	257
Management (general)	276
Management Skills	151
Marketing/PR	141
Office Skills	55
Physical Distribution	43
Public Administration	95
Purchasing/Procurement and Sourcing	34
Retailing/Wholesaling/Distributive Trades	144
Typing/Shorthand/Secretarial Skills	59
Care	104
Social Care/Social Work Skills	104
Computing and ICT	1,272
Computer Technology	430
Information Work/Information Use	22
IT: Computer Science/Programming/Systems	535
IT: Computer Use	24
Software for Specific Applications/Industries	109
Text/Graphics/Multimedia Presentation Software	119
Using Software and Operating Systems	33
Social subjects	464
Humanities/General Studies/Combined Studies	36
Social Sciences General/Combined	427
Social Studies	1
Creative Industries	2,815
Art and design	1,626
Art Studies/Fine Arts	283
Art Techniques/Practice	217
Decorative Metal Crafts/Jewellery	64
Design (non-industrial)	387
Fashion/Textiles/Clothing (craft)	291
Glass/Ceramics/Stone Crafts	28
Interior Design/Fitting/Decoration	120

Photography	193
Print and Publishing	43
Media	729
Audio and Visual Media	95
Communication/Media (general)	176
Film/Video Production	259
Journalism	152
Writing (authorship)	47
Performing arts	460
Dance	70
Music History/Theory	55
Music Performance	110
Musical Instrument Technology	44
Performing Arts (general)	46
Theatre and Dramatic Arts	135
Health, Care and Education	1,324
Care	1,299
Child Care Services	299
Crisis Support/Counselling	33
Family/Community Work/Youth Advice Work	17
Health Care Management/Health Studies	399
Occupational Health and Safety	31
Semi-Medical/Physical/Psycho/Therapies	92
Social Care/Social Work Skills	428
Education and training	25
Education Theory/Learning Issues	7
Teaching/Training	1
Teaching/Training: Specific Subjects	1
Training/Vocational Qualifications	16
STEM	5,274
Construction	1,273
Building Design/Architecture	107
Building Services	214
Building/Construction Operations	11
Built Environment (general)	208
Civil Engineering	344
Construction (general)	162
Construction Management	102
Property: Surveying/Planning/Development	49
Woodworking/Furniture Manufacture	76
Engineering	2,354
Electrical Engineering	645
Electrical/Electronic Servicing	64
Electronic Engineering	117
Engineering Services	119
Engineering/Technology (general)	455
Industrial Control/Monitoring	19
Industrial Design/Research and Development	3
Manufacturing (general)	31

Mechanical Engineering	784
Oil and Gas Operations	63
Vehicle Maintenance/Repair	15
Welding/Joining	39
Land-based industries	84
Agriculture/Horticulture (general)	84
Nautical studies	1,215
Marine Transport	694
Ship and Boat Building/Marine/Offshore Engineering	521
Science	348
Life Sciences	93
Mathematics	123
Medical Sciences	17
Science and Technology (general)	115
Tourism, Hospitality and Leisure	2,149
Hairdressing, Beauty and Complementary Therapies	669
Complementary Medicine	19
Hair/Personal Care Services	388
Therapeutic Personal Care	262
Hospitality and tourism	708
Cookery	151
Food Science/Technology	40
Hospitality Services	24
Hotel/Catering (general)	147
Tourism/Travel	346
Sport and Leisure	772
Arts/Culture/Heritage Administration	39
Sports Studies/Combined Sports	713
Water Sports	20
Grand Total	16,831

Part-time Higher Education Enrolments

Row Labels	Count of Student matriculation number
Access and Supported Learning	476
Education and training	23
Languages and ESOL	453
Business Services	1,073
Business, management and administration	803
Care	5
Computing and ICT	230
Social subjects	35
Creative Industries	104
Art and design	75
Media	27
Performing arts	2
Health, Care and Education	567
Care	470
Education and training	97
STEM	3,124
Construction	744
Engineering	1,358
Land-based industries	71
Nautical studies	776
Science	175
Tourism, Hospitality and Leisure	180
Hairdressing, Beauty and Complementary Therapies	84
Hospitality and tourism	63
Sport and Leisure	33
Grand Total	5,524

Post Course Destinations of Full-Time Successful Learners

Economic Sector	Total qualifiers	Study	Work	Not work or study	Unknown destination
Access and Supported Learning	546	79%	2%	5%	14%
Business Services	2,532	78%	12%	2%	9%
Creative Industries	1,904	68%	17%	3%	11%
Health, Care and Education	1,430	72%	14%	2%	13%
STEM	2,214	61%	28%	1%	10%
Tourism, Hospitality and Leisure	2,142	64%	23%	3%	11%
Grand Total	10,768	69%	18%	2%	11%

Employment destinations of FT successful completers

Economic Sector:	Curriculum Area:						Grand Total
	Access and Supported Learning	Business Services	Creative Industries	Health, Care and Education	STEM	Tourism, Hospitality and Leisure	
A: Agriculture, forestry and fishing	1				8	3	12
C: Manufacturing		3	9	1	75	2	90
D: Electricity, gas, steam and air conditioning supply		4	1		31	3	39
E: Water supply, sewerage, waste management and remediation activities		1	1				2
F: Construction		9	8		58	2	77
G: Wholesale and retail trade; repair of motor vehicles and motorcycles	2	50	82	16	49	57	256
H: Transport and storage	1	21	5		53	17	97
I: Accommodation and food service activities		37	56	13	13	114	233
J: Information and communication		16	24	3	4	4	51
K: Financial and insurance activities		17	5	2	1	10	35
L: Real estate activities		3			4	1	8
M: Professional, scientific and technical activities		56	28	2	227	1	314
N: Administrative and support service activities		19	9	7	6	13	54
O: Public administration and defence; compulsory social security	2	8	2	11	16	9	48
P: Education	1	6	5	32	3	5	52
Q: Human health and social work activities	1	19	11	98	10	31	170
R: Arts, entertainment and recreation	2	11	61	3	31	91	199
S: Other service activities		11	17	1	14	112	155
T: Activities of households as employers; undifferentiated goods- and services			1			1	2
U: Activities of extraterritorial organisations and bodies			1	1	2		4
Unknown		3	3	4	8	7	25
Grand Total	10	294	329	194	613	483	1,923

Comparison between sector employment shares and full-time enrolment volumes (SCQF 6+)

Percent of Employment		Full-time Enrolments (SCQF 6+)	
17.8%	Health	Business, management and administration	15.6%
12.2%	Business administration & support services	Art and design	13.3%
8.8%	Retail	Care	10.5%
8.1%	Education	Computing and ICT	7.5%
7.6%	Professional, scientific & technical	Engineering	7.3%
6.7%	Accommodation & food services	Hairdressing, Beauty and Complementary Therapies	6.4%
5.6%	Public administration & defence	Sport and Leisure	6.1%
5.1%	Financial & insurance	Construction	5.5%
5.1%	Arts, entertainment, recreation & other services	Hospitality and tourism	5.4%
4.4%	Construction	Media	5.1%
4.2%	Information & communication	Social subjects	4.6%
4.2%	Manufacturing	Nautical studies	4.4%
3.0%	Transport & storage (inc postal)	Science	4.1%
2.4%	Wholesale	Performing arts	3.8%
2.0%	Property	Land-based industries	0.2%
1.5%	Motor trades	Education and training	0.1%
1.3%	Mining, quarrying & utilities	Languages and ESOL	0.1%
0.0%	Agriculture, forestry & fishing		

Annex A: Description of Sector Groupings

<u>Employment Areas:</u>	Economic Sectors:	<u>College Subject Areas:</u>
Administration Services Financial Services Business Services (incl. property) ICT	1. Business Services	Business, management and administration Computing and ICT
Creative Industries Textiles	2. Creative Industries	Media Art and design Performing arts
Energy and Utilities Technology and Engineering Maritime Motor Trades Construction Manufacturing Agriculture and Fisheries Forest and Timber Technologies Life Sciences Chemical Sciences	3. Science, Technology, Engineering and Mathematics (STEM)	Construction Engineering Nautical studies Land-based industries Science
Food and Drink Tourism, Hospitality and Leisure Retail	4. Tourism, Hospitality and Leisure	Sport and leisure Hairdressing, beauty and complementary therapies Hospitality and tourism
Social care Health care Early Years Education	5. Health, Care and Education	Care Education and training