Construction Skills Network

Greater London 2013-2017

Labour Market Intelligence

CITB-ConstructionSkills is tasked by Government to ensure the UK's largest industry has the skilled workforce it requires. Working with Government, training providers and employers, it is responsible for ensuring that the industry has enough qualified new entrants and that the existing workforce is fully skilled and qualified, as well as for improving the performance of the industry and the companies within it.

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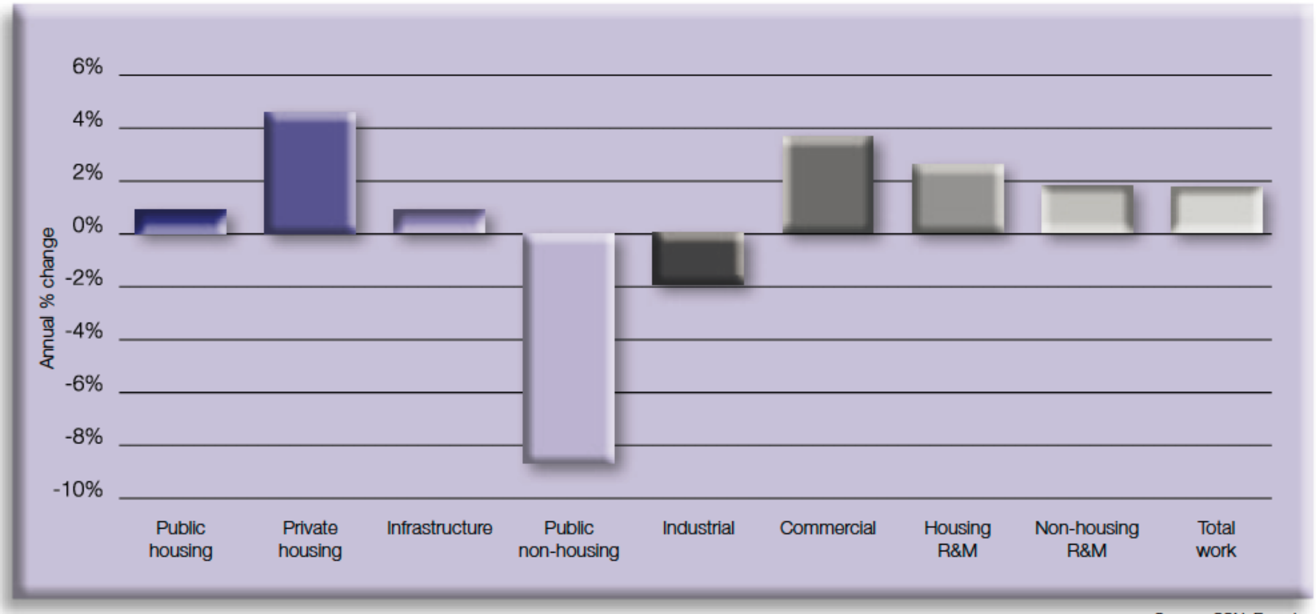
1. Summary – Greater London

The capital is predicted to see growth in construction activity over the forecast period with average annual increases of 1.9%, performing better than the UK as a whole, where annual average growth of 0.8% is expected. Construction employment is estimated to be 346,250 in 2017, rising at an average annual rate of 0.6% over the five years to 2017. The annual recruitment requirement (ARR) for Greater London is 1,180, which is equivalent to just 0.3% of base 2013 employment, much lower than the national average (1.2%).

Annual average construction output growth 2013-2017 – Greater London



Source: CSN, Experian
ref. CSN Explained, Section 3, Note 2

Construction activity in the capital will increase on average by 1.9% per year over the forecast period

Key findings

Greater London's construction sector saw only one year of decline (2009) before increasing strongly in 2010 and 2011. An estimated contraction of 1% in 2012 is expected to be followed by stagnation in 2013 before growth returns in 2014. The weak short-term prospects for the industry are predicated on substantial declines in the public construction sectors, both housing and non-housing. The public non-housing sector has seen significant growth in recent years, benefitting from both the Building Schools for the Future (BSF) programme and the Olympic build work. Public funding cuts will impact on the sector and output is expected to fall markedly.

Things are looking rosy for the infrastructure sector in the near term, with a number of schemes on going, including various station upgrades and Crossrail. Activity on the latter is due to peak in 2014/15 and infrastructure activity will start to tail off towards the end of the forecast period, reflecting the lower output stream from this major project. However, activity in the sector in 2017 will only be slightly lower than its record high level in 2011.

The private housing sector is expected to fare the best over the forecast period, driven by recovering economic conditions which will stimulate demand. The sector has already more than recovered the ground lost during the recession and will reach a new record high by 2017. Short-term prospects for the commercial sector are muted, with weak business and consumer confidence providing little incentive for investment in new retail and leisure facilities, and demand for offices has eased even in London. However, a more sustained economic recovery will provide the base for work to start on new developments.

Construction employment in Greater London is expected to see an average annual increase of 0.6% over the forecast period, one of only two regions and devolved nations to see employment rising, on average. The majority of the occupations are forecast to see employment growth over the five years to 2017 with plasterers and dry liners experiencing the strongest annual average growth of 4.2%, whilst bricklayers are expected to see employment fall by 2.8% per year on average over the same period.

The capital's ARR at 1,180 represents 0.3% of total projected base 2013 employment, significantly lower than the UK average (1.2%). The largest absolute requirement is for wood trades and interior fit-out, but as a proportion of 2013 base employment, at 6.3%, glaziers will be the most sought after.

Regional comparisons 2013-2017

	Annual average % change in output	Change in total employment	Total ARR
North East	1.7%	-7,950	690
Yorkshire and Humber	-0.9%	-16,110	1,910
East Midlands	-0.4%	-8,590	1,860
East of England	1.2%	6,550	5,820
Greater London	1.9%	10,060	1,180
South East	1.1%	-12,780	4,570
South West	1.3%	-12,400	2,910
Wales	2.7%	-7,080	2,950
West Midlands	-1.4%	-23,210	830
Northern Ireland	1.7%	-5,040	660
North West	-0.4%	-14,500	2,870
Scotland	1.1%	-10,690	2,800
UK	0.8%	-101,740	29,050

Source: CSN, Experian
ref. CSN Explained, Section 3, Note 2

2. The outlook for construction in Greater London

2.1 Construction output in Greater London – overview

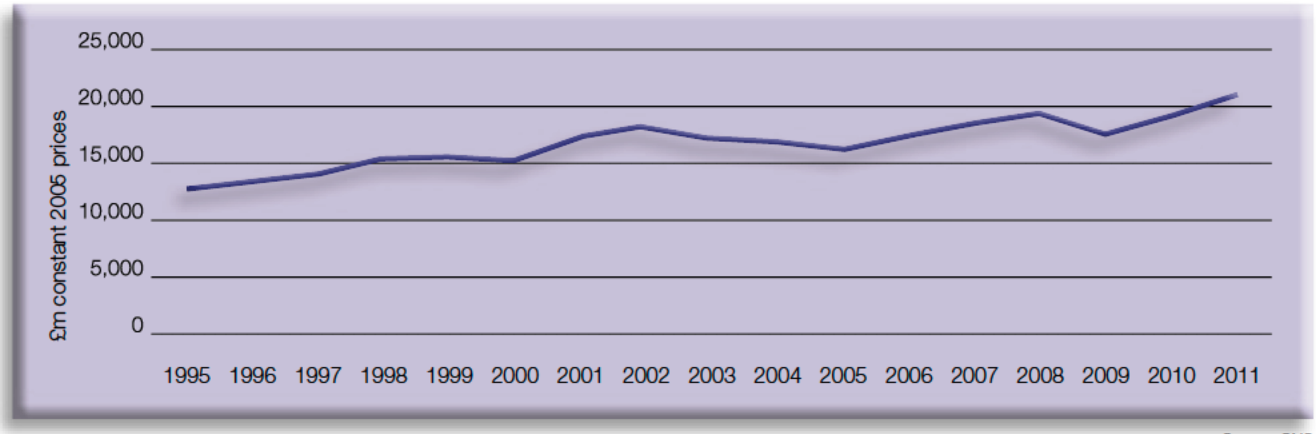
Construction output in Greater London reached a new record high in 2011, rising by 10% to reach £20.9bn in 2005 prices. The new work sector saw an increase of 12% to £14.9bn, while repair and maintenance (R&M) output rose by a weaker 6% to £6bn.

The marked reduction in funding for public housing led to a decline in output in the sector across the majority of English regions in 2011, and London was no exception, although output fell by just 1% in the capital.

Public non-housing output more than doubled between 2007 and 2010, boosted by work on the BSF programme and venues for the London 2012 Olympic Games. Activity on these programmes of work began to wind down in 2011 and output in the sector fell by 15% during the year.

The remaining new work sectors saw output rise during 2011, with private housing experiencing the most marked increase as output went up by 44% to reach a new record high of £2.3bn. Infrastructure output also rose strongly, posting growth of 27% whilst commercial construction output increased by 10%.

Construction output 1995-2011 – Greater London



Source: ONS
ref. CSN Explained, Section 3, Note: 1

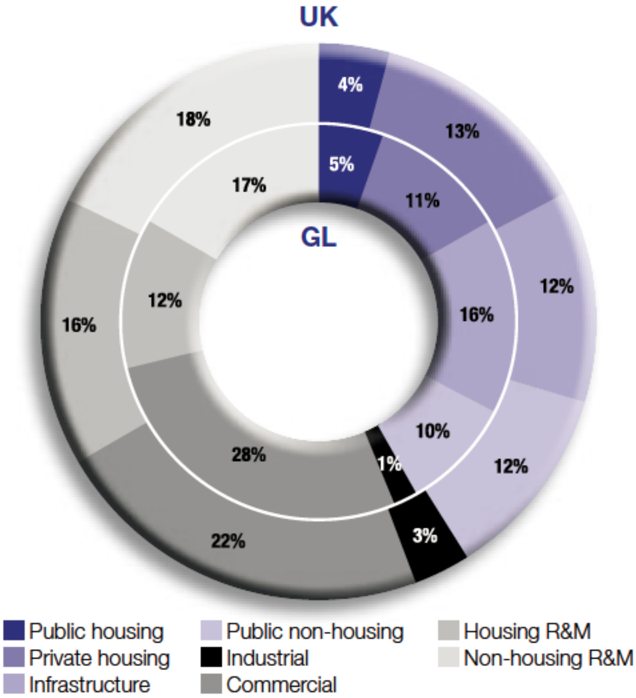
2.2 Industry structure

The diagram, construction industry structure 2011 – UK vs. Greater London, illustrates the sector breakdown of construction in the capital compared to that in the UK as a whole. Effectively, the percentages for each sector illustrate what proportion of total output each sector accounts for.

The new work sector in Greater London is significantly larger than in the UK as a whole, taking a 71% share of total output in the region compared with a national figure of 66%.

The infrastructure sector accounted for 16% of construction output in the capital in 2011, compared with only 12% in the UK as a whole, whilst the commercial sector in the region was also larger at 28% vs. the national average of 22%. Conversely, both the housing and non-housing R&M sectors were smaller, taking a 12% vs. 16% and 17% vs. 18% share of activity respectively when compared to that of the UK as a whole. The proportions of output for private housing (11%), public non-housing (10%) and industrial (1%) sectors were all 2% below that of the national average.

Construction industry structure 2011 – UK vs. Greater London



Source: ONS, Experian

2.3 Economic overview

The expected performance of a regional or national economy over the forecast period (2013-2017) provides an indication of the construction sectors in which demand is likely to be strongest.

2.4 Economic structure

It should be noted that the Office for National Statistics (ONS) output statistics are published in current prices and are therefore inclusive of any inflationary effect. At the time of writing, ONS construction output statistics at a regional level were only available for the first two quarters of 2012.

In 2011, Gross Value Added (GVA) in Greater London rose for a second successive year, posting growth of 2.3% to take it to £277bn in 2009 prices. The capital accounted for 21.3% of total UK GVA, up marginally from 21% in 2010.

Professional and other private services accounted for the lion's share of the region's GVA at 28%, whilst finance and insurance came in second at 17%. The public services sector accounted for 15% of the capital's GVA, taking third place. Despite ongoing cutbacks in the public sector, it grew by 3.3% in Greater London during 2011. The information and communication and wholesale and retail sectors accounted for 10% and 8% of the region's GVA respectively. The manufacturing, mining and quarrying and agriculture, forestry and fishing sectors, which together accounted for just 2.9% of Greater London's GVA, were the only sectors in capital to see declines in output in 2011.

Economic structure – Greater London (£ billion, 2009 prices)

Selected sectors	Actual	Forecast *Annual % change, real terms*					
	2011	2012	2013	2014	2015	2016	2017
Professional and other private services	79	1.7	1.6	2.6	2.7	3.0	3.1
Finance and insurance	47	-0.6	1.8	2.4	3.7	4.3	4.5
Public services	41	1.1	0.2	0.7	0.6	0.6	1.0
Information and communication	28	2.9	1.4	2.8	3.2	3.5	3.4
Wholesale and retail	23	0.4	2.3	2.8	2.8	2.7	2.5
Total Gross Value Added (GVA)	**277**	**0.3**	**1.4**	**2.4**	**2.8**	**2.9**	**3.0**

Note: Top 5 sectors, excluding construction
Source: Experian
ref. CSN Explained, Section 3, Note 3

2.5 Forward looking economic indicators

GVA in the capital is projected to grow at an annual average rate of 2.5% between 2013 and 2017, higher than the UK average of 1.9%.

Of the top five industries mentioned above, the strongest annual average growth rate of 3.3% over the forecast period will be seen in the finance and insurance sector, the second largest one. The sector is expected to return to growth in 2013, with the pace of increase accelerating to 4.5% by 2017. The weakest performance is not surprisingly expected for the public services sector, with average annual growth of just 0.6% over the 2013-2017 period.

High levels of inflation and weak wage growth led to real household disposable incomes (RHDI) in the capital falling by a weak 0.4% in 2011. As inflation eases and wages begin to rise RHDI is projected to see steady growth over the forecast period. As disposable incomes improve, this is expected to provide some boost to household spending, which is forecast to see growth picking up over the forecast period, reaching 3% in 2017.

In 2011, unemployment was 400,000 in Greater London, equivalent to an unemployment rate of 9.6% which was significantly higher than the UK figure of 8.1%. Unemployment levels are due to rise during 2013, but as the economy begins to see more of a sustained recovery, unemployment is forecast to begin to decline from 2014 onwards.

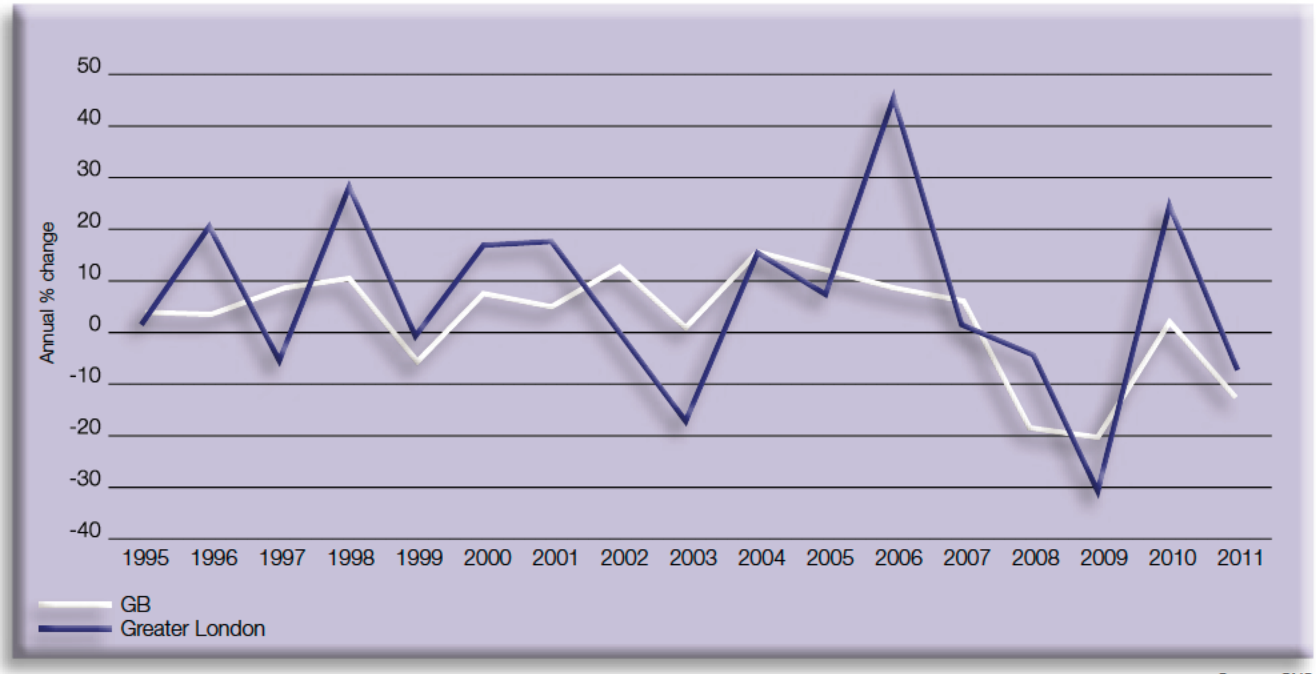
The working age population stood at 5.290m in 2011 and is predicted to see a marginal rise as a share of total population over the forecast period. House prices in the region saw a small rise in 2011 and this pattern of growth is expected to continue between 2013 and 2017.

Economic indicators – Greater London (£ billion, 2009 prices – unless otherwise stated)

	Actual	Forecast *Annual % change, real terms*					
	2011	2012	2013	2014	2015	2016	2017
Real household disposable income	151	2.2	1.7	2.2	2.1	2.3	2.8
Household spending	131	1.8	1.8	2.5	2.9	2.9	3.0
Working age population (000s and as % of all)	5,290	-66.7%	-67.0%	-67.3%	-67.6%	-67.8%	-68.0%
House prices (£)	352,545	4.7	2.4	2.6	3.3	3.5	3.8
LFS unemployment (millions)	0.40	-1.20	3.33	-4.68	-4.80	-2.23	-4.24

Source: ONS, DCLG, Experian

New construction orders growth 1995-2011 – Greater London vs. GB



Source: ONS
ref. CSN Explained, Section 3, Note 4

2.6 New construction orders – overview

New construction orders declined by almost 8% in 2011 to £10.5bn in current prices and are now 25% below their peak 2007 level. The public non-housing sector's new orders have been falling since 2009 and in 2011 the sector saw the most marked fall of 40%. The public housing sector saw a drop of 32% to £644m, whilst infrastructure orders fell by 13% to £2.8bn, the weakest decline.

As the private housing market recovers from its collapse during the recession, the sector has bounced back as orders increased by 35% to £2bn in 2011, a new record high. The industrial and commercial sectors also saw a rise in orders, of 11% and 6.5%, respectively.

2.7 New construction orders – current situation

In the first six months of 2012, new work orders for the capital declined by 13% from the corresponding period of the previous year to total £4.2bn in current prices. The commercial construction sector was the only one to see an increase in new orders in the six months to June last year as they rose by 29%, year-on-year. In contrast, infrastructure new orders dropped by 41% and industrial orders by 32%, although the relatively small size of the industrial sector means that any changes can be magnified in percentage terms.

The private housing sector saw new orders decline by 30% in the first half of 2012, reversing the recent exceptionally positive trend in the sector. New public non-housing orders fell by 24% whilst those for the public housing sector were 8% lower on an annual basis.

New work construction orders – Greater London (£ million, current prices)

	Actual 2011	Annual % change 2007	2008	2009	2010	2011
Public housing	644	-16.3	-15.8	10.0	22.8	-32.3
Private housing	2041	-4.5	-17.6	-31.0	102.6	35.3
Infrastructure	2807	25.8	13.2	39.0	43.9	-12.9
Public non-housing	1369	58.8	78.9	-33.7	-11.0	-39.9
Industrial	195	-41.3	14.2	-71.2	68.8	11.1
Commercial	3482	-4.1	-28.5	-52.7	19.5	6.5
Total new work	10,538	2.1	-5.2	-31.6	24.5	-7.6

Source: ONS
ref. CSN Explained, Section 3, Note 4

2.8 Construction output – short-term forecasts (2013-2014)

Office for National Statistics (ONS) output statistics are published in current prices and are therefore inclusive of any inflationary effect. At the time of writing, ONS construction output statistics at a regional level were only available for the first two quarters of 2012.

Greater London's output rose by 10% to £12bn in current prices in the first half of 2012 when compared to the same period in 2011, but was 5% lower on a half-year-on-half-year basis. Whilst R&M output jumped by 27% on an annual basis, the pace of increase was a much more modest 3% for the new work sectors.

Of the new work sectors, the private housing one fared the best, with output rising by 25%, while commercial construction output increased by 14%. The public non-housing sector saw a fall of 24% and public housing output declined by 21% on an annual basis.

Following an estimated decline of 1% in 2012, construction output in the capital is expected to rise by 1.9% on average in 2013 and 2014. Growth is forecast to be slightly stronger in new work output than R&M, with increases of 2% and 1.5%, respectively.

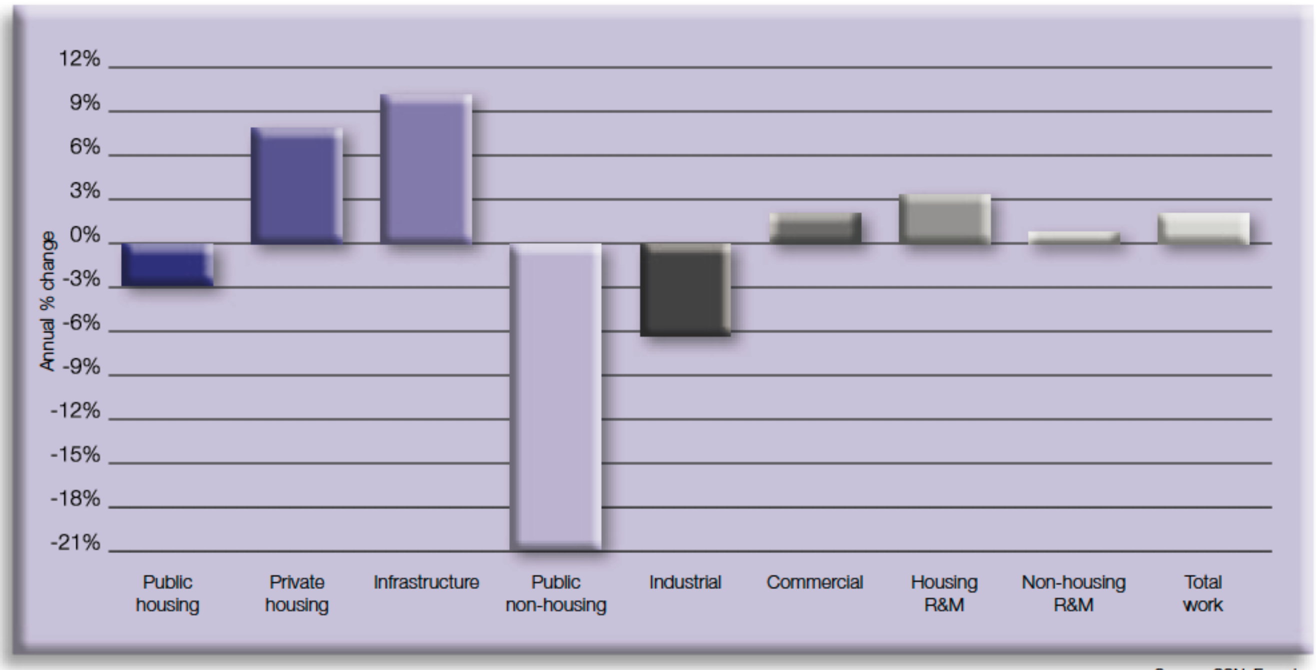
The public non-housing sector is expected to see the strongest decreases in output, falling by 20.9% per year on average in 2013 and 2014. Greater London benefitted heavily from the early waves of the BSF programme and this, coupled with the build programme for the London 2012 Olympics, led to marked growth in the sector between 2007 and 2010. Thus output in the sector has further to fall to return to more 'normal' levels.

The short term prognosis for the industrial sector is poor as a decline of 6.1% is expected in each year. However, the sector only accounted for 1.7% of the capital's new work market in 2011 and therefore any falls in output in the industrial sector will have little impact on overall construction output in Greater London.

The public housing sector is expected to see the smallest annual average decline in output over the next two years, of 2.8%. The capital received funding of £4.2bn under the 2008-2011 National Affordable Housing Programme, but under the current allocations for the 2011-2015 Affordable Housing Programme, London has received just £628m so far.

The infrastructure sector will fare the best in the short term, with an average annual increase of 10%. A raft of schemes are currently underway or due to start over the next few years, including Crossrail where activity is expected to peak in 2014-2015. Tunnelling has already started for Crossrail and in total 21kms of twin-bore tunnel are due to be constructed under Central London as part of the project. Construction work worth £2bn is also on going based on the new station programme, covering Paddington, Tottenham Court Road, Bond Street, Farringdon, Liverpool Street and Canary Wharf.

Annual average construction output growth 2013-2014 – Greater London



Source: CSN, Experian
ref. CSN Explained, Section 3, Note 2

Construction output – Greater London (£ million, 2005 prices)

	Actual 2011	Forecast annual % change 2012	2013	2014	Annual average 2013-14
Public housing	1,106	-20%	-10%	5%	-2.8%
Private housing	2,303	4%	8%	8%	7.8%
Infrastructure	3,360	-7%	12%	8%	10.0%
Public non-housing	2,025	-20%	-28%	-14%	-20.9%
Industrial	258	-8%	-12%	0%	-6.1%
Commercial	5,824	2%	0%	4%	1.8%
New work	14,876	-4%	0%	4%	2.0%
Housing R&M	2,546	1%	1%	5%	3.1%
Non-housing R&M	3,432	12%	0%	1%	0.4%
Total R&M	5,978	8%	1%	3%	1.5%
Total work	20,854	-1%	0%	4%	1.9%

Source: Experian
ref. CSN Explained, Section 3, Notes 1 and 2

2.9 Construction output – long-term forecasts (2013-2017)

Over the five years to 2017, Greater London's construction sector is projected to see annual average growth of 1.9%, stronger than the UK average of 0.8%. Whilst the R&M sector is predicted to rise by 2.1% per year, the new work one will see a slightly weaker annual average increase of 1.8%.

The public non-housing sector is expected to be the worst performing sector in the capital with an average annual decline of 8.6% over the five years to 2017. Greater London benefitted from 11 schemes totalling 111 schools in Waves 1 to 3 of the BSF programme, worth approximately £1.3bn. As the majority of this work has already been completed, large falls for the sector are expected, with output not forecast to stabilise until 2015. Nevertheless, there are still some projects planned in the sector, including a £1bn development for University College London (UCL) which will see halls of residence and laboratories built on a 23-acre site next to the Olympic Park. The scheme will need to re-house 300 households currently on the Carpenters Estate of council flats. Construction is expected to begin in 2014, subject to contract finalisation, with completion due by 2017.

Over the next five years, the private housing market is expected to see increases in output of 4.6% per year, on average. A more sustained recovery in the wider economy, along with receding concerns over unemployment, should provide some boost to demand. The capital also benefits from foreign investment demand and has held up better than other parts of the country. The pace of increase in private housing in London over the five years to 2017 is expected to be the strongest of all the regions and devolved nations.

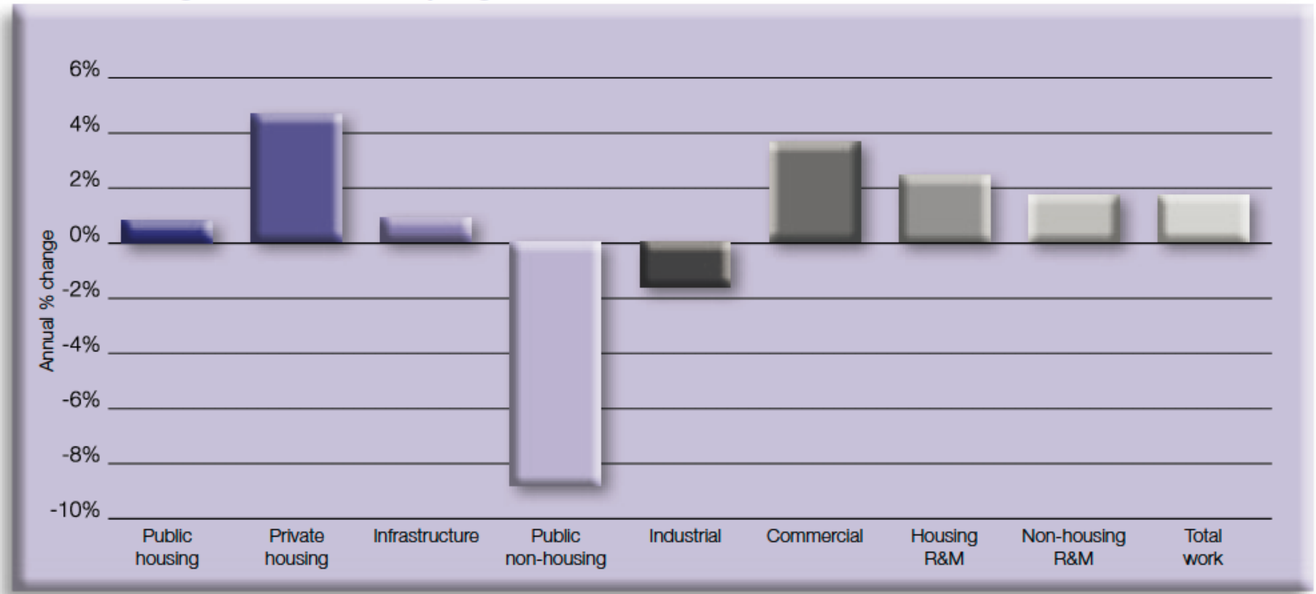
The commercial construction sector is forecast to see annual average growth of 3.7% over the five years to 2017, with the pace of increase picking up over the forecast period. In the near term it remains difficult for developers to know when to bring schemes forward, even in the capital, given the stuttering economic recovery. There have been mixed reactions in London, with some schemes being taken forward and some, such as the Pinnacle, remaining on hold. A more sustained economic recovery should provide some impetus for investment in new facilities, and improvements in consumer spending should stimulate demand for retail and leisure facilities.

Marginal average annual growth of 0.7% is expected for the public housing sector over the five years to 2017. Inevitably the lower levels of funding from the current Affordable Housing Programme will lead to falls in output for the sector; however, as the economy recovers and social housing providers become more adept in sourcing finance, we expect the sector to return to growth in 2014.

The infrastructure sector is expected to see average annual growth of just 0.7% over the five years to 2017. The sector is expected to fare well in the short term, with activity on Crossrail peaking in 2014/15 and various other schemes ongoing. However, output is forecast to decline in 2016 and 2017 as activity begins to wind down on this scheme. Nevertheless, output in 2017 will still be only slightly below its recent peak in 2011.

Greater London is one of only two regions to see an increase in employment over the forecast period

Annual average construction output growth 2013-2017 – Greater London



Source: CSN, Experian
ref. CSN Explained, Section 3, Note 2

Construction output – Greater London (£ million, 2005 prices)

	Estimate	Forecast annual % change					Annual average
	2012	2013	2014	2015	2016	2017	2013-17
Public housing	879	-10%	5%	6%	2%	2%	0.7%
Private housing	2,396	8%	8%	3%	1%	4%	4.6%
Infrastructure	3,117	12%	8%	1%	-6%	-9%	0.7%
Public non-housing	1,614	-28%	-14%	0%	1%	1%	-8.6%
Industrial	236	-12%	0%	0%	0%	5%	-1.7%
Commercial	5,966	0%	4%	3%	6%	6%	3.7%
New work	14,209	0%	4%	2%	1%	1%	1.8%
Housing R&M	2,568	1%	5%	1%	2%	2%	2.4%
Non-housing R&M	3,859	0%	1%	3%	3%	3%	1.9%
R&M	6,427	1%	3%	2%	3%	3%	2.1%
Total work	20,636	0%	4%	2%	2%	2%	1.9%

Source: CSN, Experian
ref. CSN Explained, Section 3, Note 2

2.10 Beyond 2017

Work on Crossrail is not due to complete until 2018 with activity peaking in 2014/15, providing an output stream beyond the current forecast period, whilst the Thames Tunnel element of the Thames Tideway water and sewerage project will see main construction work begin at the earliest in 2016.

There are a number of large-scale regeneration projects which are planned in the capital and expected to complete over the next 15 to 20 years. These include the redevelopment of Earl's Court and West Kensington, Greater London's largest scheme since the Olympics, spanning over 77 acres. The first phase of this mixed-use development is expected to start in 2013, with the whole scheme expected to take 20 years to complete. Planning permission has recently been granted for the first phase of the £1.5bn Heygate Regeneration, which in total will incorporate about 2,800 homes and Central London's largest park for 70 years. The scheme is likely to take around 15 years to complete.

3. Construction employment forecasts for Greater London

3.1 Total construction employment forecasts by occupation

The table presents actual construction employment (SICs 41-43, 71.1, and 74.9) in Greater London for 2011, the forecast total employment in 26 occupations and in the industry as a whole between 2013 and 2017. A full breakdown of occupational groups is provided in Section 5 of CSN Explained.

In 2011, the largest construction-specific occupations in the region was construction managers, which accounted for 11% of the total workforce, followed by wood trades and interior fit-out, and electrical trades and installation, which both accounted for 9%.

The majority of the occupations are forecast to see employment rise over the five years to 2017, with plasterers and dry liners experiencing the strongest annual average growth rate of 4.2%. By 2017, employment levels for the occupation are predicted to reach 6,100, however plasters and dry liners will only account for 2% of the total workforce.

Bricklayers are predicted to see the strongest annual average employment fall, of 2.8% over the same period. By 2017, employment numbers for the occupation are expected to be approximately a third down on the recent 2007 peak levels.

Overall, total employment in Greater London will edge up by 0.6% per year over the forecast period, one of only two regions and devolved nations expected to see an increase in employment over the forecast period. In 2017, construction employment in the capital is expected to total 346,250, which will still be 6% lower than the recent peak in 2008.

Total employment by occupation – Greater London

	Actual	Forecast	
	2011	2013	2017
Senior, executive, and business process managers	24,750	24,640	24,290
Construction managers	35,810	36,740	37,220
Non-construction professional, technical, IT, and other office-based staff	50,430	51,180	50,990
Wood trades and interior fit-out	30,730	33,070	35,240
Bricklayers	4,320	4,050	3,690
Building envelope specialists	12,080	12,010	11,960
Painters and decorators	10,400	10,710	10,900
Plasterers and dry liners	4,400	5,360	6,100
Roofers	2,400	2,660	2,810
Floorers	5,250	5,250	5,290
Glaziers	2,480	2,690	3,030
Specialist building operatives nec*	7,530	7,170	6,920
Scaffolders	4,000	3,950	3,920
Plant operatives	3,240	3,340	3,350
Plant mechanics/fitters	4,290	4,990	5,580
Steel erectors/structural	2,090	2,040	1,940
Labourers nec*	10,250	10,470	10,530
Electrical trades and installation	29,980	28,650	27,370
Plumbing and HVAC trades	19,930	19,880	20,000
Logistics	1,640	1,630	1,580
Civil engineering operatives nec*	6,290	6,830	7,330
Non-construction operatives	2,550	2,660	2,600
Civil engineers	5,560	5,810	6,290
Other construction professionals and technical staff	23,570	25,370	27,110
Architects	16,110	16,890	17,740
Surveyors	11,140	11,840	12,470
Total (SIC 41-43)	274,840	279,970	282,640
Total (SIC 41-43, 71.1, 74.9)	331,220	339,880	346,250

Source: ONS, CSN, Experian
ref. CSN Explained, Section 3, Notes 5 and 6
* Not elsewhere classified

3.2 Annual recruitment requirements (ARR) by occupation

The ARR is a gross requirement that takes into account workforce flows into and out of construction, due to factors such as movements between industries, migration, sickness, and retirement. However, these flows do not include movements into the industry from training, due to the inconsistency and coverage of supply data. Therefore, the annual recruitment requirement provides an indication of the number of new employees that would need to be recruited into construction each year in order to realise forecast output.

The ARR for the 26 occupations within Greater London's construction industry is illustrated in the table. The figure of 1,180 is indicative of the average requirements per year for the industry, as based on the output forecasts for the region. This takes into account 'churn' i.e. the flows into and out of the industry, excluding training flows.

The capital accounts for 4.1% of total UK annual recruitment requirement (ARR) and it is 0.3% of total projected base 2013 employment, much lower than the UK as a whole (1.2%).

The largest absolute requirement among trade occupations is for wood trades and interior fit-out (190), building envelope specialists (180) and plasterers and dry liners (180). However, in terms of a percentage of base 2013 employment, glaziers (6.3%) and plasterers and dry liners (3.4%) are expected to be the most in demand.

The latest mobility report from CITB-ConstructionSkills provides some good indications of geographic flows for the construction industry. According to the survey, 46% of the construction workforce in the Greater London originated there, the lowest of all the regions and devolved nations and much lower than the UK figure of 66%.The second biggest contribution to the region's construction workforce was from the South East, at 24%. Employees from outside the UK also played a significant role in the capital's construction labour force (16%).

Please note that all of the ARRs presented in this section are employment requirements and not necessarily training requirements. This is because some new entrants to the construction industry, such as skilled migrants or those from other industries where similar skills are already used, will be able to work in the industry without the need for significant retraining.

Non-construction operatives is a diverse occupational group including all of the activities under the SICs 41-43, 71.1, and 74.9 umbrella that cannot be classified elsewhere, such as cleaners, elementary security occupations nec and routine inspectors and testers. The skills required in these occupations are highly transferable to other industries and forecasting such movement is hazardous given the lack of robust supportive data. Therefore the ARR for non-construction operatives is not published.

Finally, for certain occupations there will be no appreciable requirement over the forecast period, partly due to the recession creating a 'pool' of excess labour.

Annual recruitment requirement by occupation – Greater London

	2013-2017
Senior, executive, and business process managers	190
Construction managers	-
Non-construction professional, technical, IT, and other office-based staff	-
Wood trades and interior fit-out	190
Bricklayers	-
Building envelope specialists	180
Painters and decorators	90
Plasterers and dry liners	180
Roofers	<50
Floorers	110
Glaziers	170
Specialist building operatives nec*	<50
Scaffolders	-
Plant operatives	<50
Plant mechanics/fitters	-
Steel erectors/structural	-
Labourers nec*	-
Electrical trades and installation	-
Plumbing and HVAC trades	-
Logistics	-
Civil engineering operatives nec*	-
Non-construction operatives	-
Civil engineers	-
Other construction professionals and technical staff	-
Architects	-
Surveyors	-
Total (SIC 41-43)	1,180
Total (SIC 41-43, 71.1, 74.9)	1,180

Source: CSN, Experian
ref. CSN Explained, Section 3, Notes 5 and 6
* Not elsewhere classified

4. Comparisons across the UK

Interestingly, the profile of output growth at regional and devolved nation level over the 2013-2017 period is not as south-east centric as we might have expected, with Wales forecast to have the strongest average annual growth. However, Wales' growth is almost entirely due to the new nuclear power station planned at Wylfa in Anglesey, with average annual growth of just 0.6% if the project is removed from the forecast period. Although Hitachi's technology, the Advanced Boiling Water Reactor (ABWR) will need to go through a generic design assessment, construction is still expected to start during the current forecast period.

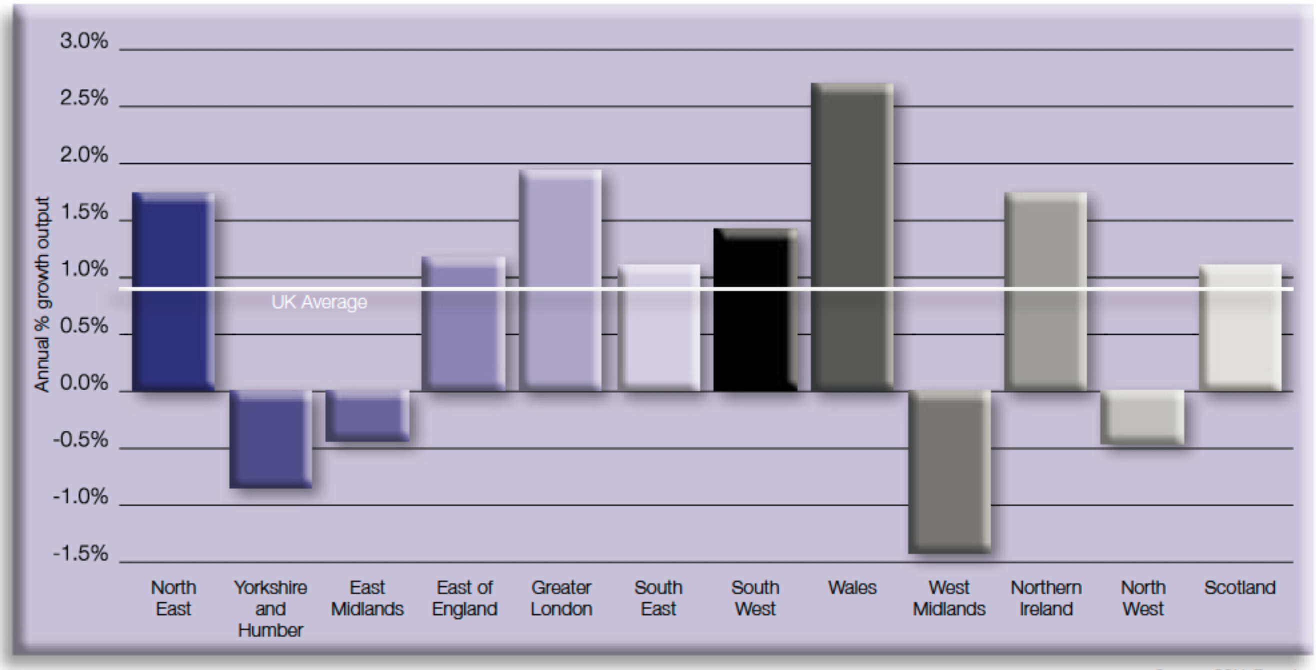
The North East is coming back up from a very low base – the region saw the worst fall of all the English regions between 2007 and 2012, with output declining by 30% over the period – hence the relatively stronger outlook for the region over the forecast period. In comparison, Scotland's decline over the same period was just 17%. To demonstrate how the greater south-east has weathered the last five years better than elsewhere, the best three performing regions were Greater London (+13%), the South East (-1%) and the East of England (-7%). Northern Ireland, in contrast, is coming back from an even lower base – output declined by 36% between 2007 and 2012. This, combined with the fact that it saw a fall off in public sector work a year before the other regions and devolved nations (2010 compared with 2011) meaning smaller declines going forward, indicates that the outlook for Northern Ireland may be a little better than the UK average.

The profile of employment changes across the regions and devolved nations is different to that of output over the period to 2017. The relationship between overall output and employment is not straightforward given that some sectors are much more labour-intensive than others, and the relative performances of the sectors within overall output impacts on the prospects for employment across the UK. For example, Wales' output growth is largely predicated on the new nuclear power station at Wylfa and new nuclear build is one of the least labour intensive areas of the construction industry. Greater London and the East of England are the only two regions predicted to see employment growth over the forecast period, and even here it is very weak.

There is also the issue of underemployment in the industry coming to the fore, which will impact on the speed with which construction employment in a particular region and devolved nation returns to growth. For example, the North West saw output fall by an estimated 29% between 2007 and 2012 in real terms, whilst employment declined by just 11% over the same period. This substantial output and employment 'gap' suggests that firms in the region have not been shedding staff at the same rate as activity has been dropping. Therefore job shedding is likely to continue in the region for some time after output starts to improve. A similar profile of output and employment declines has been seen across a number of regions and devolved nations to various degrees, with the 'gap' widening outside of the greater south east. It appears to be the case that parts of the UK with more directly-employed labour have seen this effect more than those with a more labour-only sub-contractor focus in terms of construction employment.

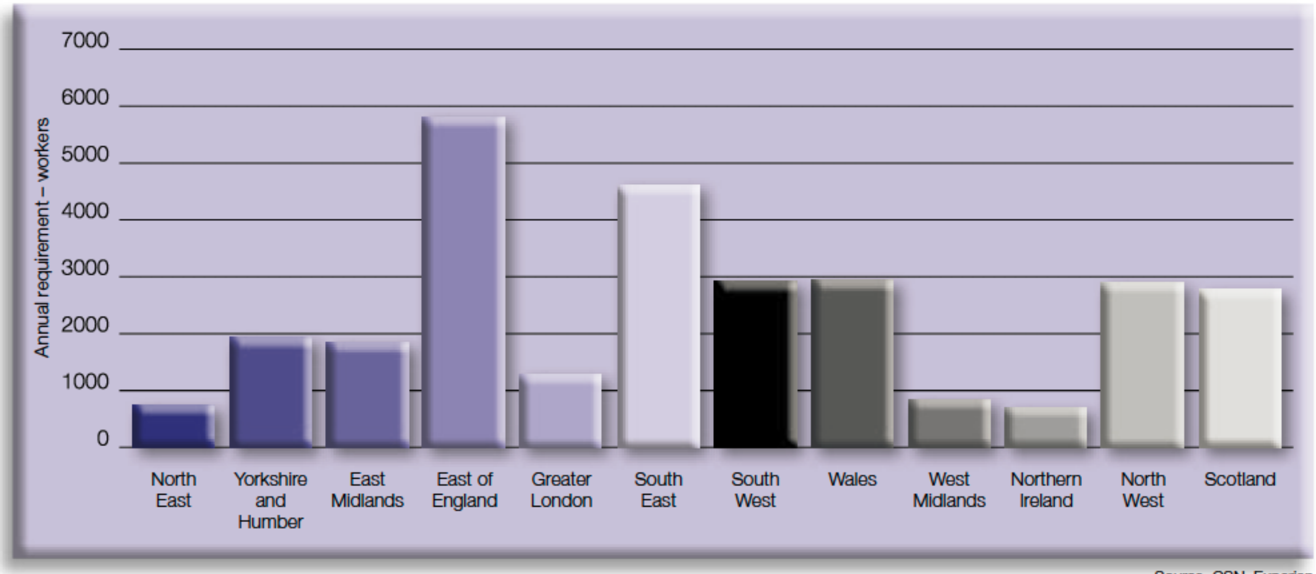
Repair and Maintenance will increase by 2.1% on average per year between 2013 and 2017

Annual average output growth by region 2013-2017



Source: CSN, Experian
ref. CSN Explained, Section 3, Note 2

Annual recruitment requirement (ARR) by region 2013-2017



Source: CSN, Experian

CSN Explained

This appendix provides further details and clarification of some of the points covered in the report.

Section 1 gives an overview of the underpinning methods that are used by the CSN, working in partnership with Experian, to produce the suite of reports at a UK, national and regional level.

Section 2 provides a glossary to clarify some of the terms that are used in the reports, while Section 3 has some further notes that relate to the data sources that are used for the various charts and tables. Section 3 also outlines what is meant by the term footprint, when talking about the areas of responsibility that lie with a Sector Skills Council.

Section 4 explains the sector definitions used within the report and provides examples of what is covered in each.

Section 5 gives a detailed breakdown of the 26 occupational groups into the individual standard occupational classification (SOC) codes that are aggregated to provide the employment and recruitment requirement.

Section 6 then concludes by giving details about the range of LMI reports, the advantages of being a CSN member and the contact details should people be interested in joining.

1. CSN Methodology

Background

The **Construction Skills Network** has been evolving since its conception in 2005 acting as vehicle for CITB-ConstructionSkills to collect and produce information on the future employment and training needs of the industry. CITB-ConstructionSkills, CIC and CITB Northern Ireland are working as ConstructionSkills, the Sector Skills Council for Construction to produce robust Labour Market Intelligence to provide a foundation on which to plan for future skills needs and to target investment.

The CSN functions at both a national and regional level. It comprises of a National Group, 12 Observatory groups, a forecasting model for each of the regions and countries, and a Technical Reference Group. An Observatory group currently operates in each of the nine English regions and also in Wales, Scotland and Northern Ireland.

Observatory groups currently meet bi-annually and consist of key regional stakeholders invited from industry, Government, education and other SSCs, all of whom contribute local industry knowledge and views on training, skills, recruitment, qualifications and policy. The National Group also includes representatives from industry, Government, education and other SSCs. This Group convenes twice a year and sets the national scene, effectively forming a backdrop for the Observatories.

At the heart of the CSN are a number of forecasting models which generate forecasts of employment requirements within the industry for a range of occupational groups. The models are designed and managed by Experian under the independent guidance and validation of the Technical Reference Group, comprised of statisticians and modelling experts. The Models have been, and will continue to be, evolved over time to ensure that they account for new research as it is published as well as new and improved modelling techniques. Future changes to the model will only be made after consultation with the Technical Reference Group.

The model approach

The model approach relies on a combination of primary research and views from the CSN to facilitate it. National data is used as the basis for the assumptions that augment the models, which are then adjusted with the assistance of the Observatories and National Group. Each English region, Wales, Scotland and Northern Ireland has a separate model (although all models are inter-related due to labour movements) and, in addition, there is one national model that acts as a constraint to the individual models and enables best use to be made of the most robust data (which is available at the national level). The models work by forecasting demand and supply of skilled workers separately. The difference between demand and supply forms the employment requirement.

The forecast total employment levels are derived from expectations about construction output and productivity. Essentially this is based upon the question 'How many people will be needed to produce forecast output, given the assumptions made about productivity?'.

The **annual recruitment requirement (ARR)** is a gross requirement that takes into account workforce flows into and out of construction, due to such factors as movements between industries, migration, sickness, and retirement. However, these flows do not include movements into industry from training, due to the inconsistent currency and coverage of supply data. Therefore, the annual recruitment requirement provides an indication of the number of new employees that would need to be recruited into construction each year in order to realise forecast output.

Demand is based upon the results of discussion groups comprising industry experts, a view of construction output and a set of integrated models relating to wider national and regional economic performance. The models are dynamic and reflect the general UK economic climate at any point in time. To generate the labour demand, the models make use of a set of specific statistics for each major type of work that determine the employment, by trade, needed to produce the predicted levels of construction output. The labour supply for each type of trade or profession is based upon the previous year's supply (the total stock of employment) combined with flows into and out of the labour market.

The key leakages (outflows) that need to be considered are:

- transfers to other industries
- international/domestic OUT migration
- permanent retirements (including permanently sick)
- outflow to temporarily sick and home duties.

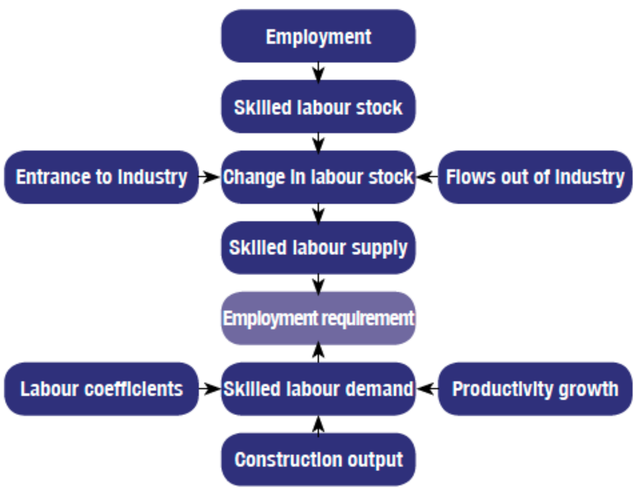
The main reason for outflow is likely to be transfer to other industries.

Flows into the labour market include:

- transfers in from other industries
- international/domestic IN migration
- inflow from temporarily sick and home duties.

The most significant inflow is likely to be from other industries.

A summary of the model is shown in the flow chart.



2. Glossary of Terms

- **Building envelope specialists** – any trade involved with the external cladding of the building other than bricklaying, e.g. curtain walling.
- **Demand** – demand is calculated using construction output data from the Office for National Statistics (ONS) and the Department of Finance and Personnel Northern Ireland (DFP), along with vacancy data from the National Employers Skills Survey, from the Department for Education and Skills. These data sets are translated into labour requirements by trade by using a series of coefficients to produce the labour demand that relates to the forecasted output levels.
- **GDP** – Gross Domestic Product – total market value of all final goods and services produced. A measure of national income. GDP=GVA plus taxes on products minus subsidies on products.
- **GVA** – Gross Value Added – total output minus the value of inputs used in the production process. GVA measures the contribution of the economy as a difference between gross output and intermediate outputs.
- **Coefficients** – To generate the labour demand, the model makes use of a set of specific statistics for each major type of work to determine employment, by trade or profession, based upon the previous year's supply. In essence this is the number of workers in each occupation/trade to produce £1m of output across each sub-sector.
- **LFS (Labour Force Survey)** – a UK household sample survey which collects information on employment, unemployment, flows between sectors and training, from around 53,000 households each quarter (>100,000 people).
- **LMI (Labour Market Intelligence)** – data that are quantitative (numerical) or qualitative (insights and perceptions) on workers, employers, wages, conditions of work, etc.
- **Macroeconomics** – the study of an economy on a national level, including total employment, investment, imports, exports, production and consumption.
- **Nec** – not elsewhere classified, used as a reference in LFS data.
- **ONS** – Office for National Statistics – official statistics on economy, population and society at national UK and local level.
- **Output** – total value of all goods and services produced in an economy.
- **Productivity** – output per employee.
- **SIC codes** – Standard Industrial Classification codes – from the UK Standard Industrial Classification of Economic Activities produced by the ONS.
- **SOC codes** – Standard Occupational Classification codes.
- **Supply** – the total stock of employment in a period of time plus the flows into and out of the labour market. Supply is usually calculated from LFS data.

3. Notes and Footprints

Notes

1 Except for Northern Ireland, output data for the English regions, Scotland and Wales are supplied by the Office for National Statistics (ONS) on a current price basis. Therefore national deflators produced by the ONS have been used to deflate to a 2005 constant price basis, i.e. the effects of inflation have been stripped out.

2 The annual average growth rate of output is a compound average growth rate, i.e. the rate at which output would grow each year if it increased steadily year-on-year over the forecast period.

3 Only selected components of gross value added (GVA) are shown in this table and so do not sum to the total.

4 For new construction orders comparison is made with Great Britain rather than the UK, owing to the fact that there are no orders data series for Northern Ireland.

5 Employment numbers are rounded to the nearest 10.

6 The tables include data relating to plumbers and electricians. As part of SIC 43, plumbers and electricians working in contracting are an integral part of the construction process. However, it is recognised by CITB-ConstructionSkills that SummitSkills has responsibility for these occupations across a range of SIC codes, including SIC 43.2.

7 The employment and ARR tables show separate totals for SIC 41-43 and SIC 41-43, 71.1 and 74.9. The total for SIC 41-43 covers the first 22 occupational groups on the relevant tables and excludes civil engineers, other construction professionals and technical staff, architects and surveyors. The total for SIC 41-43, 71.1 and 74.9 includes all occupations.

Footprints for Built Environment SSCs

CITB-ConstructionSkills is responsible for SIC 41 Construction of Buildings, SIC 42 Civil Engineering, SIC 43 Specialised Construction Activities and SIC 71.1 Architectural and engineering activities; Technical Testing and Analysis.

The table summarises the SIC codes (2007) covered by CITB-ConstructionSkills:

The sector footprints for the other SSCs covering the built environment:

SummitSkills

Footprint – Plumbing, Heating, Ventilation, Air Conditioning, Refrigeration and Electrotechnical.

Coverage – Building Services Engineering.

CITB-ConstructionSkills shares an interest with SummitSkills in SIC 43.21 Electrical Installation and SIC 43.22 Plumbing, heat and air-conditioning installation. CITB-ConstructionSkills recognises the responsibility of Summit Skills across Standard Industrial Classfications (SIC) 43.21 and 43.22, therefore data relating to the Building Services Engineering sector is included here primarily for completeness.

AssetSkills

Footprint – Property Services, Housing, Facilities Management, Cleaning.

Coverage – Property, Housing and Land Managers, Chartered Surveyors, Estimators, Valuers, Home Inspectors, Estate Agents and Auctioneers (property and chattels), Caretakers, Mobile and Machine Operatives, Window Cleaners, Road Sweepers, Cleaners, Domestics, Facilities Managers.

AssetSkills has a peripheral interest SIC 71.1 Architectural and engineering activities and related technical consultancy.

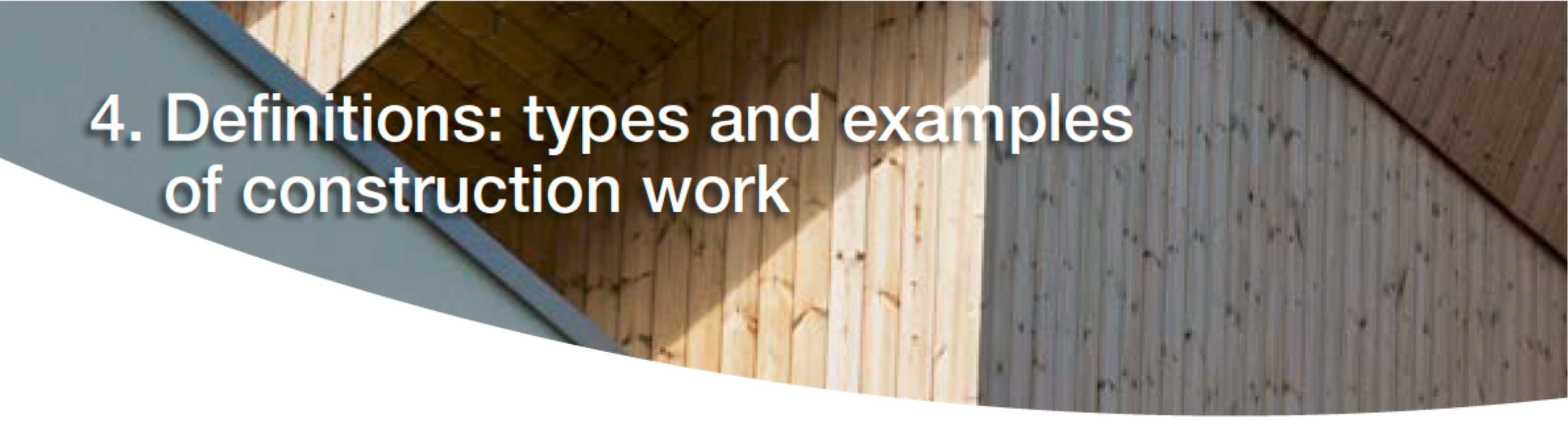
Energy and Utility Skills

Footprint – Electricity, Gas (including gas installers), Water and Waste Management.

Coverage – Electricity generation and distribution; Gas transmission, distribution and appliance installation and maintenance; Water collection, purification and distribution; Waste water collection and processing; Waste Management.

CITB-ConstructionSkills	
SIC Code	**Description**
41.1	Development of building projects
41.2	Construction of residential and non-residential buildings
42.1	Construction of roads and railways
42.2	Construction of utility projects
42.9	Construction of other civil engineering projects
43.1	Demolition and site preparation
43.3	Building completion and finishing
43.9	Other specialised construction activities nec
71.1*	Architectural and engineering activities and related technical consultancy

* AssetSkills has a peripheral interest in SIC 71.1



4. Definitions: types and examples of construction work

Public sector housing – local authorities and housing associations, new towns and government departments

Housing schemes, old people's homes and the provision within housing sites of roads and services for gas, water, electricity, sewage and drainage.

Private sector housing

All privately owned buildings for residential use, such as houses, flats and maisonettes, bungalows, cottages and the provision of services to new developments.

Infrastructure – public and private

Water

Reservoirs, purification plants, dams, water works, pumping stations, water mains, hydraulic works etc.

Sewerage

Sewage disposal works, laying of sewers and surface drains.

Electricity

Building and civil engineering work for electrical undertakings such as power stations, dams and other works on hydroelectric schemes, onshore wind farms and decommissioning of nuclear power stations.

Gas, communications, air transport

Gas works, gas mains and gas storage; post offices, sorting offices, telephone exchanges, switching centres etc.; air terminals, runways, hangars, reception halls, radar installations.

Railways

Permanent way, tunnels, bridges, cuttings, stations, engine sheds etc., signalling and other control systems and electrification of both surface and underground railways.

Harbours

All works and buildings directly connected with harbours, wharves, docks, piers, jetties, canals and waterways, sea walls, embankments and water defences.

Roads

Roads, pavements, bridges, footpaths, lighting, tunnels, flyovers, fencing etc.

Public non-residential construction[1]

Factories and warehouses

Publicly owned factories, warehouses, skill centres.

Oil, steel, coal

Now restricted to remedial works for public sector residual bodies.

Schools, colleges, universities

State schools and colleges (including technical colleges and institutes of agriculture); universities including halls of residence, research establishments etc.

Health

Hospitals including medical schools, clinics, welfare centres, adult training centres.

Offices

Local and central Government offices, including town halls, offices for all public bodies except the armed services, police headquarters.

Entertainment

Theatres, restaurants, public swimming baths, caravan sites at holiday resorts, works and buildings at sports grounds, stadiums, racecourses etc. owned by local authorities or other public bodies.

Garages

Buildings for storage, repair and maintenance of road vehicles, transport workshops, bus depots, road goods transport depots and car parks.

Shops

Municipal shopping developments for which the contract has been let by a Local Authority.

Agriculture

Buildings and work on publicly financed horticultural establishments; fen drainage and agricultural drainage; veterinary clinics.

Miscellaneous

All work not clearly covered by any other headings, such as fire stations, police stations, prisons, reformatories, remand homes, civil defence work, UK Atomic Energy Authority work, council depots, museums, libraries.

Private industrial work

Factories, warehouses, wholesale depots, all other works and buildings for the purpose of industrial production or processing, oil refineries, pipelines and terminals, concrete fixed leg oil production platforms (not rigs); private steel work; all new coal mine construction such as sinking shafts, tunnelling, etc.

[1] Where contracts for the construction or improvement of non-residential buildings used for public service provision, such as hospitals, are awarded by private sector holders of contracts awarded under the Private Finance Initiative, the work is classified as 'private commercial'.

Private commercial work[2]

Schools and universities

Schools and colleges in the private sector, financed wholly from private funds.

Health

Private hospitals, nursing homes, clinics.

Offices

Office buildings, banks.

Entertainment

Privately owned theatres, concert halls, cinemas, hotels, public houses, restaurants, cafés, holiday camps, swimming pools, works and buildings at sports grounds, stadiums and other places of sport or recreation, youth hostels.

Garages

Repair garages, petrol filling stations, bus depots, goods transport depots and any other works or buildings for the storage, repair or maintenance of road vehicles, car parks.

Shops

All buildings for retail distribution such as shops, department stores, retail markets, showrooms, etc.

Agriculture

All buildings and work on farms, horticultural establishments.

Miscellaneous

All work not clearly covered by any other heading, e.g. exhibitions, caravan sites, churches, church halls.

New work

New housing

Construction of new houses, flats, bungalows only.

All other types of work

All new construction work and all work that can be referred to as improvement, renovation or refurbishment and which adds to the value of the property[3].

Repair and maintenance

Housing

Any conversion of, or extension to, any existing dwelling and all other work such as improvement, renovation, refurbishment, planned maintenance and any other type of expenditure on repairs or maintenance.

All other sectors

Repair and maintenance work of all types including planned and contractual maintenance[4].

[2] Where contracts for the construction or improvement of non-residential buildings used for public service provision, such as hospitals, are awarded by private sector holders of contracts awarded under the Private Finance Initiative, the work is classified as 'private commercial'.

[3] Contractors reporting work may not always be aware of the distinction between improvement or renovation work and repair and maintenance work in the non-residential sectors.

[4] Except where stated, mixed development schemes are classified to whichever sector provides the majority (i.e. over 50%) of finance.

5. Occupational Groups

Occupational group
Description, SOC (2000) reference.

Senior, executive and business process managers
Directors and chief executives of major organisations, 1112
Senior officials in local government, 1113
Financial managers and chartered secretaries, 1131
Marketing and sales managers, 1132
Purchasing managers, 1133
Advertising and public relations managers, 1134
Personnel, training and industrial relations managers, 1135
Office managers, 1152
Civil service executive officers, 4111
Property, housing and land managers, 1231
Information and communication technology managers, 1136
Research and development managers, 1137
Customer care managers, 1142
Storage and warehouse managers, 1162
Security managers, 1174
Natural environment and conservation managers, 1212
Managers and proprietors in other services nec*, 1239

Construction managers
Production, works and maintenance managers, 1121
Managers in construction, 1122
Quality assurance managers, 1141
Transport and distribution managers, 1161
Recycling and refuse disposal managers, 1235
Managers in mining and energy, 1123
Occupational hygienists and safety officers (H&S), 3567
Conservation and environmental protection officers, 3551

Non-construction professional, technical, IT, and other office-based staff (excl. managers)
IT operations technicians, 3131
IT user support technicians, 3132
Estimators, valuers and assessors, 3531
Finance and investment analysts/advisers, 3534
Taxation experts, 3535
Financial and accounting technicians, 3537
Vocational and Industrial trainers and instructors, 3563
Business and related associate professionals nec*, 3539
Legal associate professionals, 3520
Inspectors of factories, utilities and trading standards, 3565
Software professionals, 2132
IT strategy and planning professionals, 2131
Estate agents, auctioneers, 3544
Solicitors and lawyers, judges and coroners, 2411
Legal professionals nec*, 2419
Chartered and certified accountants, 2421
Management accountants, 2422
Management consultants, actuaries, economists and statisticians, 2423
Receptionists, 4216
Typists, 4217
Sales representatives, 3542
Civil Service administrative officers and assistants, 4112
Local government clerical officers and assistants, 4113
Accounts and wages clerks, book-keepers, other financial clerks, 4122
Filing and other records assistants/clerks, 4131
Stock control clerks, 4133
Database assistants/clerks, 4136
Telephonists, 4141
Communication operators, 4142
General office assistants/clerks, 4150
Personal assistants and other secretaries, 4215
Sales and retail assistants, 7111
Telephone salespersons, 7113
Buyers and purchasing officers (50%), 3541
Marketing associate professionals, 3543
Personnel and industrial relations officers, 3562
Credit controllers, 4121
Market research interviewers, 4137
Company secretaries (excluding qualified chartered secretaries), 4214
Sales related occupations nec*, 7129
Call centre agents/operators, 7211
Customer care occupations, 7212
Elementary office occupations nec*, 9219

Wood trades and interior fit-out
Carpenters and joiners, 5315
Pattern makers, 5493
Paper and wood machine operatives, 8121
Furniture makers, other craft woodworkers, 5492
Labourers in building and woodworking trades (9%), 9121
Construction trades nec* (25%), 5319

Bricklayers
Bricklayers, masons, 5312

Building envelope specialists
Construction trades nec* (50%), 5319
Labourers in building and woodworking trades (5%), 9121

Painters and decorators
Painters and decorators, 5323
Construction trades nec* (5%), 5319

Plasterers and dry liners
Plasterers, 5321

Roofers
Roofers, roof tilers and slaters, 5313

Floorers
Floorers and wall tilers, 5322

Glaziers
Glaziers, window fabricators and fitters, 5316
Construction trades nec* (5%), 5319

Specialist building operatives nec*
Construction operatives nec* (80%), 8149
Construction trades nec* (5%), 5319
Industrial cleaning process occupations, 9132

Scaffolders
Scaffolders, stagers, riggers, 8141

Plant operatives
Crane drivers, 8221
Plant and machine operatives nec*, 8129
Transport operatives nec*, 8219
Fork-lift truck drivers, 8222
Mobile machine drivers and operatives nec*, 8229
Agricultural machinery drivers, 8223

Plant mechanics/fitters
Metal working production and maintenance fitters, 5223
Motor mechanics, auto engineers, 5231
Labourers in process and plant operations nec*, 9139
Tool makers, tool fitters and markers-out, 5222
Vehicle body builders and repairers, 5232
Auto electricians, 5233
Vehicle spray painters, 5234
Tyre, exhaust and windscreen fitters, 8135

Steel erectors/structural
Steel erectors, 5311
Welding trades, 5215
Sheet metal workers, 5213
Metal plate workers, shipwrights and riveters, 5214
Construction trades nec* (5%), 5319
Smiths and forge workers, 5211
Moulders, core makers, die casters, 5212
Metal machining setters and setter-operators, 5221

Labourers nec*
Labourers in building and woodworking trades (80%), 9121

Electrical trades and installation
Electricians, electrical fitters, 5241
Electrical/electronic engineers nec*, 5249
Telecommunications engineers, 5242
Lines repairers and cable jointers, 5243
TV, video and audio engineers, 5244
Computer engineers, installation and maintenance, 5245

Plumbing and heating, ventilation, and air conditioning trades
Plumbers and HVAC trades, 5314
Pipe fitters, 5216
Labourers in building and woodworking trades (6%), 9121
Construction trades nec* (5%), 5319

Logistics
Heavy goods vehicle drivers, 8211
Van drivers, 8212
Packers, bottlers, canners, fillers, 9134
Other goods handling and storage occupations nec*, 9149
Buyers and purchasing officers (50%), 3541
Transport and distribution clerks, 4134
Security guards and related occupations, 9241

Civil engineering operatives nec*
Road construction operatives, 8142
Rail construction and maintenance operatives, 8143
Quarry workers and related operatives, 8123
Construction operatives nec* (20%), 8149
Labourers in other construction trades nec*, 9129

Non-construction operatives
Metal making and treating process operatives, 8117
Process operatives nec*, 8119
Metal working machine operatives, 8125
Water and sewerage plant operatives, 8126
Assemblers (vehicle and metal goods), 8132
Routine inspectors and testers, 8133
Assemblers and routine operatives nec*, 8139
Stevedores, dockers and slingers, 9141
Hand craft occupations nec*, 5499
Elementary security occupations nec*, 9249
Cleaners, domestics, 9233
Road sweepers, 9232
Gardeners and groundsmen, 5113
Caretakers, 6232

Civil engineers
Civil engineers, 2121

Other construction professionals and technical staff
Mechanical engineers, 2122
Electrical engineers, 2123
Chemical engineers, 2125
Design and development engineers, 2126
Production and process engineers, 2127
Planning and quality control engineers, 2128
Engineering professional nec*, 2129
Electrical/electronic technicians, 3112
Engineering technicians, 3113
Building and civil engineering technicians, 3114
Science and engineering technicians nec*, 3119
Architectural technologists and town planning technicians, 3121
Draughtspersons, 3122
Quality assurance technicians, 3115
Town planners, 2432
Electronics engineers, 2124
Building inspectors, 3123
Scientific researchers, 2321

Architects
Architects, 2431

Surveyors
Quantity surveyors, 2433
Chartered surveyors (not Quantity surveyors), 2434

* not elsewhere classified

6. CSN website and contact details

The CSN website – www.cskills.org/csn

The CSN website functions as a public gateway for people wishing to access the range of Labour Market Intelligence (LMI) reports and research material regularly produced by the CSN.

The main UK report, along with the twelve LMI reports (one for Northern Ireland, Scotland, Wales and each of the nine English regions) can be downloaded from the site, while other CITB-ConstructionSkills research reports are also freely available on our website.

Having access to this range of labour market intelligence and trend insight allows industry, Government, regional agencies and key stakeholders to:

- pinpoint the associated, specific, skills that will be needed year by year
- identify the sectors which are likely to be the strongest drivers of output growth in each region and devolved nation
- track the macro economy
- understand how economic events impact on regional and devolved nations' economic performance
- highlight trends across the industry such as national and regional shifts in demand
- plan ahead and address the skills needs of a traditionally mobile workforce
- understand the levels of qualified and competent new entrants required into the workforce.

The website also contains further information about:

- how the CSN functions
- the CSN Model approach
- how the Model can be used to explore scenarios
- how to contact the CSN team
- related CITB-ConstructionSkills research
- how to become a member of the network.

The CSN website can be found at:
www.cskills.org/csn

CSN members area

While the public area of the CSN website is the gateway to the completed LMI and research reports, being a member of the CSN offers further benefits.

As a CSN member you will be linked to one of the Observatory groups, which play a vital role in being able to feed back observations, knowledge and insight on what is really happening on the ground in every UK region and nation. This feedback is used to fine tune the assumptions and data that go into the forecasting programme such as:

- details of specific projects
- demand within various types of work or sectors
- labour supply
- inflows and outflows across the regions and devolved nations.

CSN members therefore have:

- early access to forecasts
- the opportunity to influence and inform the data
- the ability to request scenarios that could address 'What would happen if…' types of questions using the Model.

Through the members' area of the CSN website, members can:

- access observatory-related material such as meeting dates, agendas, presentations and notes
- download additional research material
- comment/feedback to the CSN team.

As the Observatory groups highlight the real issues faced by the industry in the UK, we can more efficiently and effectively plan our response to skills needs. If you would like to contribute your industry observations, knowledge and insight to this process and become a member of the CSN, we would be delighted to hear from you.

Contact details

For further information about the CSN website, enquiries relating to the work of the CSN, or to register your interest in joining the CSN as a member, please contact us at:
csn@cskills.org

For more information about the
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