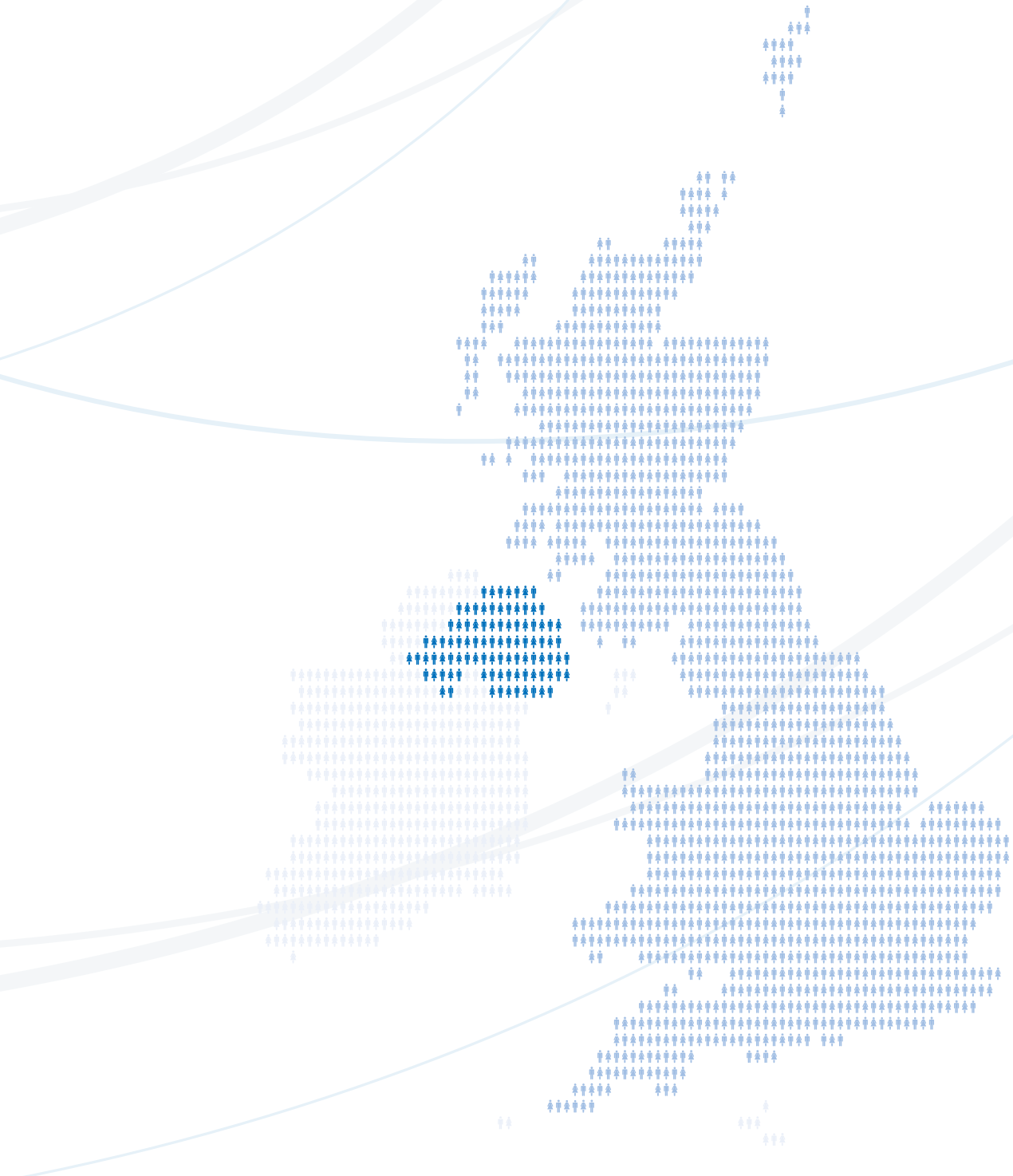


2012–2016 Construction Skills Network Northern Ireland

LABOUR MARKET INTELLIGENCE

Experian™

constructionskills

Contents

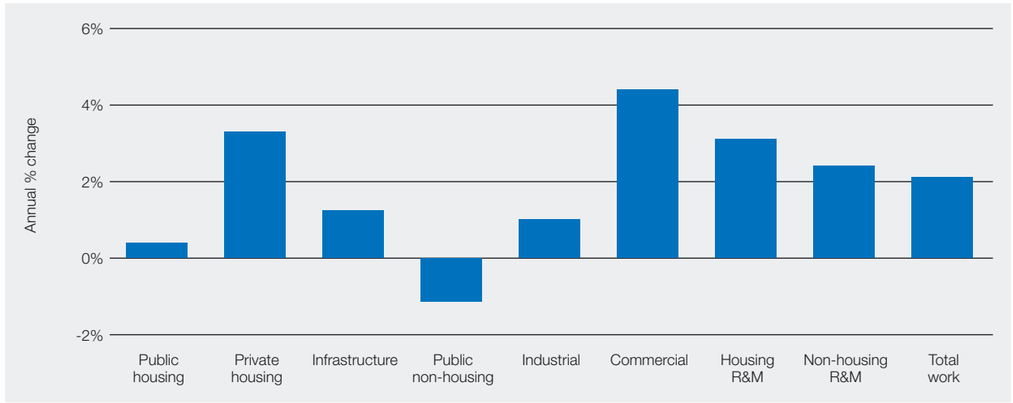
Tables and Charts

ConstructionSkills is the Sector Skills Council for construction, 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.

1. Summary – Northern Ireland

The construction industry is projected to expand at an annual average rate of 2.1% over the five years to 2016 in Northern Ireland, a stronger rate than for the UK as a whole (1.4%). However, the industry in the province will be recovering from a much steeper peak to trough fall in output than in the UK as a whole (31% compared with 16%). Employment growth in the province is forecast to average 1.3% over the five year period to 2016, with an annual recruitment requirement (ARR) of 1,170, representing 2% of base 2012 employment.

Annual average construction output growth 2012-2016 - Northern Ireland



Source: CSN, Experian
ref. CSN Explained, Section 5.3, Note 2

Titanic

Construction employment is projected to grow at an annual average rate of **1.3% between 2012 and 2016,** a better rate than for the UK as a whole (0.6%)

Key findings

The construction industry in Northern Ireland has continued to underperform the UK as a whole in output terms. Output in the UK rose by 8% in 2010, but it fell by 6% in Northern Ireland. While the estimates for 2011 suggest that they have at least moved in the same direction in that year, downwards, there is likely to be significant difference in the rate of decline, with Northern Ireland performing much worse.

One of the factors causing this divergence has been the performance of the public sectors over the past couple of years, much worse in Northern Ireland than the UK as a whole. This suggests that investment under the Northern Ireland Investment Strategy for 2008 to 2011 started to wind down towards the end of the period. Looking forward and comparing the relative levels of funding available in the 2011 to 2015 Investment Strategy with the 2008 to 2011 Strategy, the implication is for further declines, of around 20%, although the falls will not be evenly spread. While expenditure on housing is likely to hold up reasonably well, that on education will fall sharply.

The profile of expenditure on roads initially looked positive. However, uncertainty around the level of funding that the government in the Republic of Ireland can now provide towards the biggest project in the sub-sector, the improvement of the A5 trunk road, means that the prospects are not quite as good as previously expected.

A recovery in private housing output is finally expected to begin in 2012, although activity in the sector will be starting from less than half of what it was in 2007. There are some quite sizeable projects in the pipeline, including ongoing residential developments in the Titanic Quarter, and a £100m scheme on Larne Lough. Other mixed-use developments, such as Sirocco Quays, will have a large residential element. Given that, even in its much reduced state, the private housing sector accounts for over a quarter of Northern Ireland's construction output, its health is of great importance to the industry as a whole.

Construction employment is projected to grow at an annual average rate of 1.3% between 2012 and 2016, a better rate than for the UK as a whole (0.6%). However, as is the case for output, employment in Northern Ireland will be recovering from a much greater fall than in the UK as a whole (28% compared with 10%). This rate of growth will still leave employment in the province in 2016 23% below its 2007 peak. The occupations expected to be most in demand over the next five years are civil engineers and building envelope specialists, both of which are projected to see employment growth in excess of 30%, hopefully pulling back into employment many of those who had lost their jobs during the recession.

The ARR for the five-year period to 2016 for Northern Ireland is estimated at 1,170, with the biggest requirements in absolute terms for plumbing and HVAC trades (170) and bricklayers (150). Northern Ireland's ARR, at 2% of projected 2012 employment, is roughly in line with the UK average (1.9%).

National / Regional comparison 2012-2016

	Annual average % change in output	Growth in total employment	Total ARR
North East	0.5%	4,840	2,170
Yorkshire and Humber	0.0%	-6,370	2,630
East Midlands	1.0%	-1,800	3,460
East of England	2.9%	10,660	5,710
Greater London	2.5%	16,560	1,790
South East	2.2%	28,020	4,520
South West	2.2%	9,560	7,220
Wales	1.3%	11,590	4,280
West Midlands	-1.1%	-7,360	3,730
Northern Ireland	2.1%	3,880	1,170
North West	-0.9%	-6,990	5,080
Scotland	1.3%	13,520	4,480
UK	**1.4%**	**76,110**	**46,240**

Source: CSN, Experian
ref. CSN Explained, Section 5.3, Note 2

2. The outlook for construction in Northern Ireland

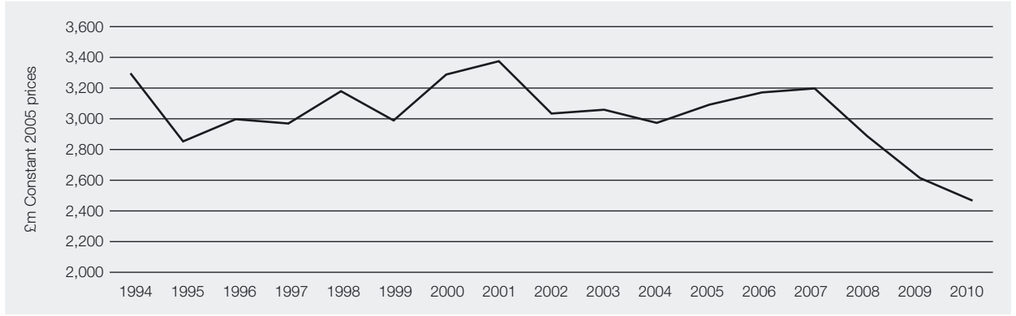
2.1 Construction output in Northern Ireland – overview

Construction output in Northern Ireland fell by 6% in 2010 to an estimated £2.47bn in 2005 prices. This was the third successive year of decline in activity in the province, a period which has seen the construction industry contract by 23%. This is a significantly poorer performance than in the UK as a whole, where output has only declined by a little over 9% during the same period.

In 2010, Northern Ireland and the UK moved in different directions and the main reason for this seems to have been the performance of the public sectors. While public housing and non-housing construction output grew by 50% and 30% respectively across the UK as a whole, they declined by 24% and 11% in Northern Ireland.

The infrastructure sector fared badly as well. Unlike the UK as a whole, where some two-thirds of infrastructure work is privately funded, nearly 90% of activity remains in the public sector in the province, and consequently the sector has suffered from the winding down of the 2008-2011 tranche of the Investment Strategy (ISNI). The biggest programme of works under the 2008-2011 ISNI was on the roads network and much of this has been completed.

Construction output 1994-2010 - Northern Ireland



Source: ONS
ref. CSN Explained, Section 5.3, Note: 1

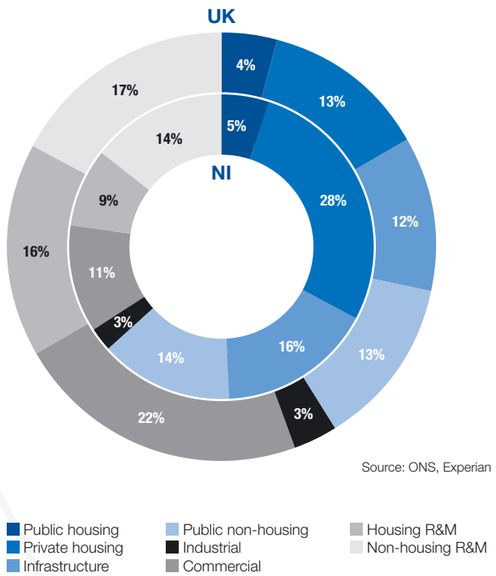
2.2 Industry structure

The diagram, Construction Industry structure 2010 – UK vs. Northern Ireland, illustrates the sector breakdown of construction in Northern Ireland compared to that in the UK. Effectively, the percentages for each sector illustrate what proportion of total output each sector accounts for.

Northern Ireland's construction industry continues to be focussed on new work, with a much smaller proportion of repair and maintenance (R&M) activity than across the UK as a whole (23% compared with 33%). The private housing sector remains the largest in Northern Ireland, accounting for 28% of output in 2010, despite substantial falls in activity in 2008 and 2009.

In contrast the commercial sector in Northern Ireland is proportionally only half the size it is in the UK. Office construction per capita in the province is lower than the UK average and no health and education construction work has been delivered through the Private Finance Initiative/ Public-Private Partnership (PFI/PPP) routes up to the end of 2010, whereas they account for about 20% of commercial work in the UK as a whole.

Construction industry structure 2010 - UK vs. Northern Ireland



Source: ONS, Experian

Economic structure - Northern Ireland (£ billion, 2006 prices)

Selected sectors	Actual	Forecast Annual % change, real terms					
	2010	2011	2012	2013	2014	2015	2016
Public services	8.4	-0.4	-0.3	-0.5	-0.5	-0.3	-0.1
Financial and business services	3.9	0.0	2.3	2.5	2.7	3.0	3.1
Transport and communications	1.4	3.3	2.2	2.2	2.2	2.3	2.3
Manufacturing	4.0	3.7	3.4	3.3	2.3	1.6	0.9
Distribution, hotels and catering	4.3	0.9	-0.1	1.0	1.6	1.9	2.3
Total Gross Value Added (GVA)	**26.8**	**0.4**	**0.6**	**1.1**	**1.3**	**1.4**	**1.5**

Source: Experian
ref. CSN Explained, Section 5.3, Note 3

2.3 Economic overview

The expected performance of a regional or national economy over the forecast period (2012–2016) provides an indication of the construction sectors in which demand is likely to be strongest.

2.4 Economic structure

Northern Ireland accounts for 2.3% of the UK's Gross Value Added (GVA) and around 3% of its population. GVA per head is thus well below the national average.

The Northern Ireland economy was worth £26.8bn in 2006 prices in 2010, a marginal increase of 0.7% on the 2009 outturn. However, the province still underperformed the UK average of 1.8%.

The sector most impacted by the recession in Northern Ireland was manufacturing which saw its share of total GVA in the province shrink.

Public services remains the single biggest element of the Northern Ireland economy and in fact the sector increased its share of GVA between 2008 and 2010 to 31.3% in the latter year, its largest since 2005. Financial & business services remains a relatively small sector of the Northern Ireland economy, accounting for 14.7% of GVA in 2010, compared with over 25% in the UK as a whole.

2.5 Forward looking economic indicators

On an annual average basis, the Northern Ireland economy is expected to expand at a rate of 1.2% between 2012 and 2016, the same rate as had been forecast in 2010 for the 2011-15 period. This still represents a relatively sluggish performance when compared with the UK as a whole, which is projected to average 1.8% growth between 2012 and 2016, but it does represent a slight closing of the gap as the UK prediction has weakened somewhat from the 2% put forward in 2010 for 2011 to 2015.

The financial & business services sector is projected to be the fastest growing over the forecast period, with an annual average rate of 2.7%, not far behind that of the UK (2.9%). However, this is well below the rates of expansion seen between 2000 and 2007. The manufacturing sector is also predicted to fare relatively well, with annual average growth of 2.3% between 2012 and 2016, in line with the UK average. In contrast public services are expected to decline by 0.3% year-on-year to 2016 as public expenditure cuts take their toll.

Real household disposable income is likely to have fallen sharply in 2011, by around 2.5% in Northern Ireland, the third consecutive year of decline. Not surprisingly under this scenario consumer spending has been under pressure. Prospects are expected to improve in 2012 as inflation starts to subside and changes to taxes and benefits work their way out of the system, but it will not be until 2013 that growth starts to return to more healthy levels. Unemployment is projected to peak in 2012 and start to decline thereafter.

According to Communities and Local Government (CLG), average house prices in Northern Ireland in 2010 were £161,824, which represented a 10.4% fall on the previous year. This was the third successive year of decline since the peak of the boom in 2007. It is likely that they have continued to drop in 2011, perhaps by as much as 10% over the year. The prospects are finally for some stabilisation in 2012 and modest rises of between 2% to 3% in the following years to 2016. It will be a very long time before house prices in Northern Ireland again approach the levels seen in 2007.

Economic indicators - Northern Ireland (£ billion, 2006 prices - unless otherwise stated)

	Actual	Forecast Annual % change, real terms					
	2010	2011	2012	2013	2014	2015	2016
Real household disposable income	23.1	-2.5	0.9	2.2	2.4	2.8	2.9
Household spending	23.1	-0.7	0.6	1.6	2.0	2.7	2.9
Working age population (000s and as % of all)	1096	61.8%	61.9%	62.5%	63.1%	63.6%	64.1%
House prices (£)	161, 824	-9.6	-0.5	2.0	2.4	2.3	2.4
LFS unemployment (millions)	0.06	0.06	0.07	0.06	0.06	0.06	0.05

Source: ONS, DCLG, Experian

2.6 Construction output – short-term forecasts (2012–2013)

Construction output data for Northern Ireland are published by the Department of Finance and Personnel and at the time of writing data was available for the first half of 2011, although unlike the English regions and other devolved nations, an estimate of output in constant prices is made. No new orders data are available for the province.

Construction output in the first quarter of 2011 held up reasonably well against the final quarter of 2010, but the outturn for the second quarter was considerably worse. Thus output in the first half of the year, at £1.03bn in 2005 prices, was 7% below the level in the second half of 2010 and 12% down on the same period in that year. This was in sharp contrast to the outturn in Great Britain in the first half of this year, which showed a much smaller fall of just over 1% half-year on half-year.

The worst performing sectors in the first half of 2011 were the private housing, infrastructure, commercial and housing R&M sectors, all with double-digit falls in activity against the two previous half-years. There was a substantial divergence between the new work and R&M sectors, with the former seeing activity decline by 10% half-year on half-year, while R&M output rose by 14% on the same comparison. R&M's share of total construction output rose to 29% in the second quarter of 2011, much closer to the UK average of 33% than is usually the case in the province.

Given the poor overall performance of the construction industry in the first half of 2011, the outturn for the year as a whole is likely to be quite strongly negative, with the private housing and the infrastructure sectors experiencing the biggest declines.

However, activity is expected to stabilise over the next two years, giving a modest annual average growth rate between 2012 and 2013 of 1.4%.

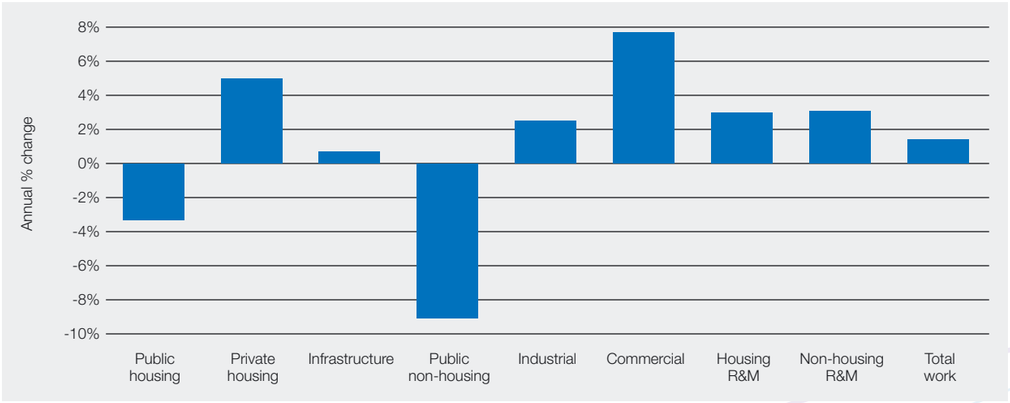
Expenditure in the public sectors – public housing, infrastructure and public non-housing - is likely to continue to fall overall in the short term, with the public non-housing sector the weakest. However, the declines are expected to be smaller than those projected for the rest of the UK, given these three sectors have already contracted sharply.

Analysis of the March Budget from the Northern Ireland Executive indicates that, across the four main construction spending areas – education, health/social/safety, transport/water/sewerage, and housing – capital investment is planned to rise slightly, at least in current prices, from £922.4m in 2011/12 to £935.8m in 2012/13. In real terms this is likely to represent a moderate fall. The public construction sectors should also benefit from the Executive's recent decision to switch some £256m of funding from resource expenditure to capital investment.

Given that the private housing sector accounts for more than a quarter of all construction in Northern Ireland, a much bigger share than across the UK as a whole (13%), the health of this sector is vital to the province's industry as a whole. Since the house price 'bubble' burst in 2008 private housing output has fallen heavily and by the end of 2011 is likely to be less than half its level in 2007. House prices are expected to stabilise in 2012 and output is predicted to rise in both 2012 and 2013 as the market starts to strengthen, assuming that external factors such as eurozone debt problems stabilise. However, the annual average growth rate of 5% over the 2012-13 period will be on top of a very low base.

In both the short and medium terms, we may see further switches from new work to R&M as recently built facilities begin to age and as part of the retrofitting agenda to meet carbon emission reduction targets.

Annual average construction output growth 2012-2013 - Northern Ireland



Source: Experian
ref. CSN Explained, Section 5.3, Note 2

Construction output - Northern Ireland (£ million, 2005 prices)

	Actual	Forecast annual % change			Annual average
	2010	2011	2012	2013	2012-13
Public housing	124	34%	-5%	-1%	-3.3%
Private housing	689	-25%	7%	3%	5.0%
Infrastructure	401	-23%	0%	1%	0.7%
Public non-housing	349	0%	-11%	-7%	-9.1%
Industrial	62	1%	4%	1%	2.5%
Commercial	281	-7%	10%	5%	7.7%
New work	**1,905**	**-13%**	**1%**	**1%**	**0.9%**
Housing R&M	210	-18%	4%	3%	3.0%
Non-housing R&M	350	7%	2%	4%	3.1%
Total R&M	**561**	**-3%**	**3%**	**4%**	**3.1%**
Total work	**2,466**	**-10%**	**1%**	**1%**	**1.4%**

Source: Experian
ref. CSN Explained, Section 5.3, Notes 1 and 2

2.7 Construction output – long-term forecasts (2012–2016)

Annual average output growth in Northern Ireland is projected to be 2.1%, higher than the UK average of 1.4%. A better performance from the public sectors, given that the province has already seen sharp declines in activity in these sectors, is the main reason for the difference in average growth rates.

The Northern Ireland Executive has recently published its Draft Investment Strategy for Northern Ireland 2011-2021. The document puts forward total investment of £5.376bn in current prices over the four years from 2011/12 to 2014/15. Of this, as much as £4.6bn could be available for construction works. However, this figure does include £800m upgrade of the A5, the future of which is now uncertain. Up to 50% of the funding for this project was due to come from the Republic of Ireland Government, but the fiscal problems facing the country has led to a substantial downgrading of the level of funding available from this source.

The construction element of the 2011 to 2015 investment strategy, of £4.6bn over four years, compares with an equivalent figure of £4.37bn in the three years 2008 to 2011. Averaging these two figures on an annual basis suggests that capital investment in construction by the public sector could fall by 21% between 2011 and 2015.

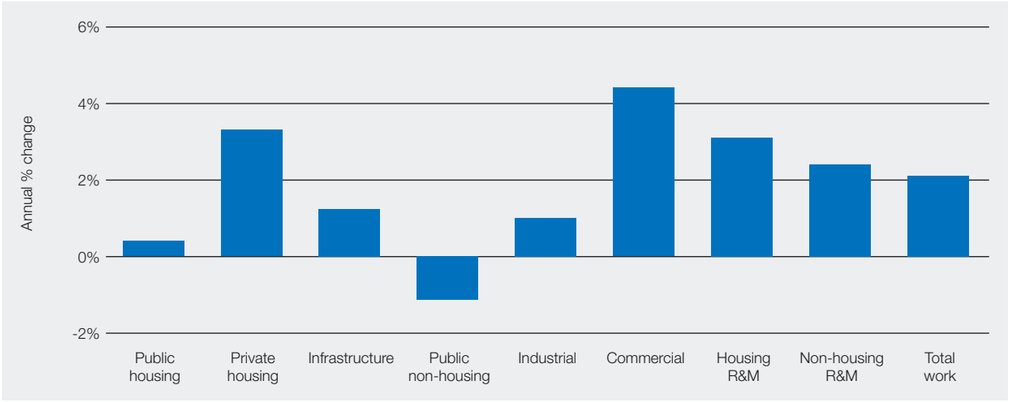
In the transport arena, focus may shift slightly from roads to rail, with the Northern Ireland Executive looking to take forward the upgrade of the Derry/Londonderry – Coleraine line, including track renewals and station improvements.

In the education sector there are still 18 schools and colleges in delivery worth over £185m. However, there is little coming through for further approval at present. The position is similar in the health sector with little or no new projects in the pipeline at present, but still a substantial body of work in delivery, totalling around £680m, the largest scheme of which is the Acute Hospital at Enniskillen.

It is not surprising therefore that the private sectors are expected to be the engines of growth over the forecast period. Annual average growth of 3.3% for the private housing sector is above its long term average in the province, but it must be remembered that the sector will be recovering from a very low base. The largest proposed housing scheme in the province is the redevelopment of a disused cement works at Larne Lough to provide 450 new homes, along with retail and leisure facilities. The total cost of the project is an estimated £100m. A major new neighbourhood scheme is proposed for the Ards area, which could be worth around £70m and begin in the first half of 2013.

On the commercial side, the first works on the £600m 10-year regeneration of Sirocco Quays in Belfast should be in the process of commencing. The project is intended to include residential, retail and leisure elements. Outside of the capital, joining the pipeline is the £100m redevelopment of Queens Parade in Bangor. Again, this will be a mixed-use scheme featuring residential, retail, office and leisure elements. The project is currently in the planning stages with an indicative start date of the middle of 2014.

Annual average construction output growth 2012-2016 - Northern Ireland



Source: CSN, Experian
ref. CSN Explained, Section 5.3, Note 2

Construction output - Northern Ireland (£ million, 2005 prices)

	Estimate	Forecast annual % change					Annual average
	2011	2012	2013	2014	2015	2016	2012-16
Public housing	166	-5%	-1%	-1%	6%	4%	0.4%
Private housing	515	7%	3%	3%	2%	2%	3.3%
Infrastructure	308	0%	1%	-1%	3%	3%	1.3%
Public non-housing	349	-11%	-7%	0%	6%	7%	-1.2%
Industrial	63	4%	1%	0%	0%	-1%	1.0%
Commercial	260	10%	5%	4%	2%	1%	4.4%
New work	**1,661**	**1%**	**1%**	**1%**	**3%**	**3%**	**1.9%**
Housing R&M	173	4%	3%	3%	3%	3%	3.1%
Non-housing R&M	373	2%	4%	2%	2%	2%	2.4%
R&M	**546**	**3%**	**4%**	**2%**	**2%**	**2%**	**2.6%**
Total work	**2,207**	**1%**	**1%**	**2%**	**3%**	**3%**	**2.1%**

Source: CSN, Experian
ref. CSN Explained, Section 5.3, Notes 2

2.8 Beyond 2016

Macro green technologies are likely to play an important part in driving construction output in Northern Ireland over the longer term. By far the biggest project in the pipeline in the province is the proposed major wind farm development off the coast of Country Antrim. The total cost of the project is currently estimated at £6.3bn, although the construction element is likely to be a lot lower, with an indicative start date of early 2016, most of the work would be beyond the current forecast period.

Carbon emission reduction targets are likely to act as a spur for retrofitting, both of residential and non-housing buildings, over the medium and long term and thus this element of the R&M is likely to grow in importance.

The Northern Ireland Executive has indicated in its latest investment strategy that post 2015 it will be concentrating its efforts and funding on colleges that have missed out on earlier investment plans and on library, museum, sports, and arts facilities across the province.

3. Construction employment forecasts for Northern Ireland

3.1 Total construction employment forecasts by occupation

The table presents actual construction employment (SICs 41-43, 71.1, and 74.9) in Northern Ireland for 2010, the forecast total employment in 26 occupations and in the industry as a whole between 2012 and 2016. A full breakdown of occupational groups is provided in Section 5 of CSN Explained.

In 2016, total construction employment in Northern Ireland is expected to reach a little over 62,000, 23% down on its 2007 peak. Employment in the province started to decline in 2008 and is likely to have continued to 2011. Employment is expected to start rising again in 2012, largely on the back of a relatively good performance in the more labour intensive R&M sectors, but growth will be slow, averaging 1.3% a year over the five years to 2016.

Civil engineers are projected to have the highest growth, of 33%, over the five years to 2016. However, they will be recovering from a very low base in 2011. Civil engineers are to a certain extent centred on the infrastructure sector and thus have suffered badly in recent years from contractions in activity in this sector, but they are also prevalent across all other sectors – some 15% of work on a housing development is civil engineering and 10% on non-housing developments. Thus they will benefit from a return to growth in both the housing and commercial sectors.

Building envelope specialists are also expected to enjoy a growth rate in excess of 30% over the forecast period, also buoyed by a return to growth in the housing and commercial sectors.

Total employment by occupation - Northern Ireland

	Actual	Forecast	
	2010	2012	2016
Senior, executive, and business process managers	1,030	1,340	1,340
Construction managers	2,660	3,090	2,580
Non-construction professional, technical, IT, and other office-based staff	6,940	5,630	7,190
Wood trades and interior fit-out	10,050	9,060	7,870
Bricklayers	2,960	3,690	3,680
Building envelope specialists	1,990	1,950	2,420
Painters and decorators	2,370	2,900	2,670
Plasterers and dry liners	2,580	1,980	2,050
Roofers	1,780	1,350	1,430
Floorers	530	600	690
Glaziers	980	870	1,000
Specialist building operatives nec*	1,740	1,640	1,640
Scaffolders	460	330	270
Plant operatives	3,330	2,540	2,640
Plant mechanics/fitters	820	730	740
Steel erectors/structural	920	1,180	1,030
Labourers nec*	3,030	3,080	3,460
Electrical trades and installation	6,260	5,240	6,450
Plumbing and HVAC trades	3,620	4,140	4,960
Logistics	850	1,100	1,120
Civil engineering operatives nec*	450	480	470
Non–construction operatives	520	620	510
Civil engineers	2,130	1,630	2,260
Other construction professionals and technical staff	2,280	2,110	2,080
Architects	1,060	1,020	880
Surveyors	540	690	720
Total (SIC 41-43)	**55,870**	**53,540**	**56,210**
Total (SIC 41-43, 71.1, 74.9)	**61,880**	**58,990**	**62,150**

Source: ONS, CSN, Experian
ref. CSN Explained, Section 5.3, Notes 5 and 6
NEC* - 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, although robust data on training provision is being developed by ConstructionSkills. Thus, 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.

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.

The ARR for the 2012 to 2016 period for the 26 occupational groups within Northern Ireland's construction industry is illustrated in the table. The ARR of 1,170 is a little higher than that predicted in 2010 for the 2011-2015 period (1,050).

The number is indicative of the average requirements per year for the industry, as based on the output forecasts. This takes into account 'churn', that flows into and out of the industry, excluding training flows.

This ARR represents 2% of projected base employment in the province in 2012, roughly in line with the UK average (1.9%). In absolute terms the largest requirements are for plumbing and HVAC trades (170) and bricklayers (150), but as a percentage of 2012 base employment, scaffolders (21%) and floorers (18%) will be most in demand.

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 - Northern Ireland

	2012-2016
Senior, executive, and business process managers	-
Construction managers	-
Non-construction professional, technical, IT, and other office-based staff	-
Wood trades and interior fit-out	-
Bricklayers	150
Building envelope specialists	<50
Painters and decorators	<50
Plasterers and dry liners	70
Roofers	90
Floorers	110
Glaziers	70
Specialist building operatives nec*	-
Scaffolders	70
Plant operatives	80
Plant mechanics/fitters	100
Steel erectors/structural	-
Labourers nec*	-
Electrical trades and installation	-
Plumbing and HVAC trades	170
Logistics	130
Civil engineering operatives nec*	60
Non–construction operatives	-
Civil engineers	<50
Other construction professionals and technical staff	<50
Architects	-
Surveyors	-
Total (SIC 41-43)	**1,140**
Total (SIC 41-43, 71.1, 74.9)	**1,170**

Source: CSN, Experian
ref. CSN Explained, Section 5.3, Notes 5 and 6
NEC* - Not elsewhere classified

4. Comparisons across the UK

The North West (-0.9%) along with the West Midlands (-1.1%) are the only regions projected to see a decline in their annual average growth rate over the next five years. For the UK the yearly growth rate is 1.4%. The best performing region is expected to be the East of England with a rate of 2.9%. Northern Ireland is expected to outperform the UK average, with 2.1% annual average output growth.

Over the forecast period, we seem to be seeing the emergence of a north/south divide, with the greater south east (the South East, Greater London and the East of England) faring best, and the northern English regions faring worst. In between are the devolved nations, who, although they have their overall expenditure limits set by Westminster, through their devolved administrations have more control on how it will be spent than the English regions. Already the devolved administrations in Scotland and Northern Ireland have redirected a proportion of resource funding to the capital expenditure account, which should benefit the construction industry in these areas. In the case of Northern Ireland this is planned to amount to £256m by 2014/15.

There are a number of reasons for the emergence of this north/south divide. The first is the more constrained outlook for public expenditure going forward. While declines in public housing activity are expected to be fairly similar across the board, with one or two exceptions, the profile for the public non-housing sector is very different. Output in this sector hit a new historic high in 2010 and since 2007 had grown by over 72% in real terms, primarily driven by work under the Building Schools for the Future (BSF) programme.

Second, major infrastructure projects are tending to be greater South East centric at present. Infrastructure activity in the UK is at a historic high, exceeding its previous peak in 1993 during the building of the Channel Tunnel. This level of activity is being driven largely by projects in the South East corner of England – Crossrail, Thameslink, M25 widening, London Gateway port, to name a few. That is not to say that there are not projects elsewhere, there are, but they are tending to be of a lesser size. With many roads projects already delivered in Northern Ireland and uncertainty around the funding of the A5 dualling project going forward, the province's infrastructure sector is projected to underperform the UK average.

Third, growth in the commercial sector is likely to be stronger in the greater South East than elsewhere in England. The offices market has already been strengthening in London and along the M4 corridor/Thames Valley, while excess capacity issues remain a problem across many regional centres. The northern English regions also have many currently mothballed retail and leisure developments for which it is difficult to see an economic imperative to restart, at least in the short term. The Titanic Quarter continues to be ongoing in Northern Ireland, with work on Sirocco Quays planned to start imminently.

Wales is predicted to have the strongest growth in employment, despite only moderate growth in output. That is because most of its growth is focussed in the more labour intensive R&M sectors. Not surprisingly, employment growth is also stronger than the UK average in the South East, Greater London and the South West. Northern Ireland's annual average rate of growth, at 1.3%, is well above the UK average, based upon better output growth and a 'bounce-back' effect from a much lower base.

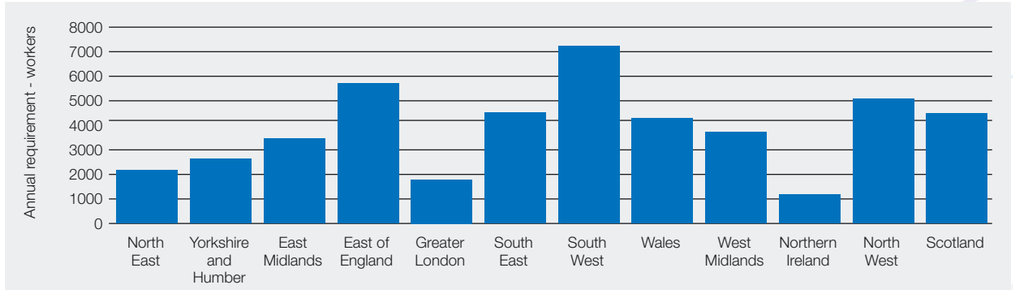
Northern Ireland's ARR as a percentage of 2012 base employment is roughly in line with the UK average, although with a small construction market there are still many occupations in the province that have no appreciable requirements over the next five years.

At 1,170, the ARR represents **2% of base 2012** employment which is in line with the **UK average (2%)**

Annual average output growth by nation/region 2012-2016

Source: CSN, Experian
ref CSN Explained, Section 5.3, Note 2

Annual recruitment requirement (ARR) by nation/region 2012-2016



Source: CSN, Experian

Lyric

Annual average output growth in Northern Ireland is projected to be **2.1%, higher than the UK average of 1.4%**

5. CSN explained

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

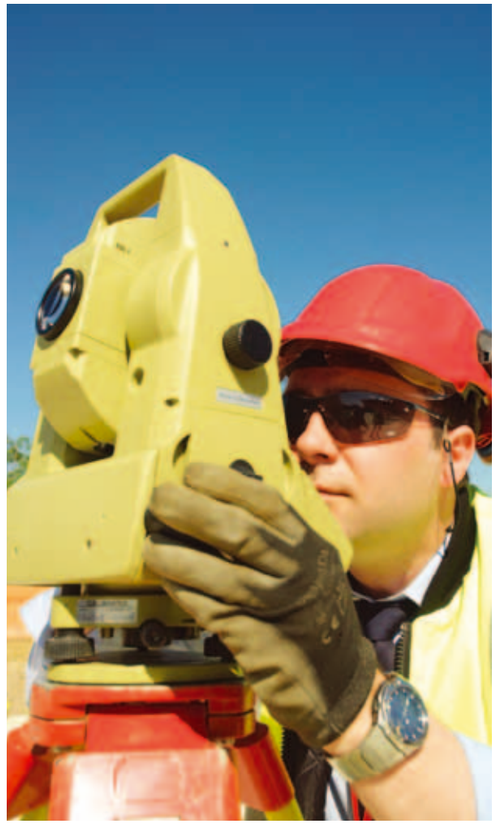
Section 5.1 gives an overview of the underpinning methods that are used by the CSN, working in partnership with Experian, to produce the suite of reports at both a UK, national and regional level.

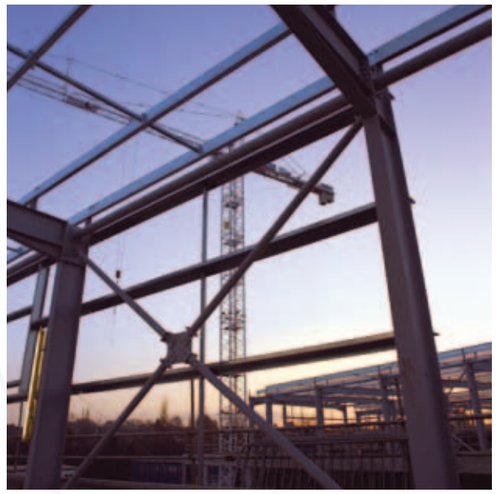
Section 5.2 provides a glossary to clarify some of the terms that are used in the reports, while section 5.3 has some further notes that relate to the data sources that are used for the various charts and tables. Section 5.3 also outlines what is meant by the term footprint, when talking about the areas of responsibility that lie with a Sector Skills Council.

Section 5.4 explains the sector definitions used within the report and provides examples of what is covered in each.

Section 5.5 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 5.6 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.





5.1 CSN methodology

Background

The **Construction Skills Network (CSN)**, launched in 2005, represents a radical change in the way that ConstructionSkills 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 once 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.

It is envisaged that the models will evolve over time as new research is published and modelling techniques improve. 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 the industry from training, although robust data on training provision is being developed by ConstructionSkills in partnership with public funding agencies, Further Education, Higher Education and employer representatives. Thus, 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 years’ 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:

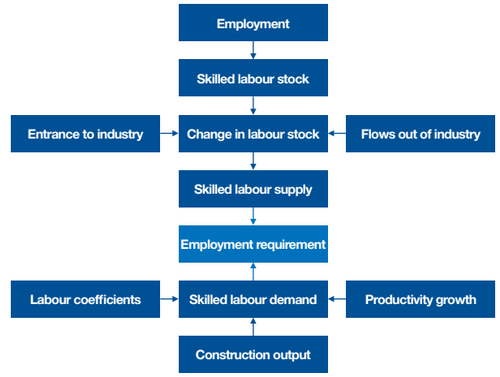
- transfers to other industries
- international/domestic OUT migration
- permanent retirements (including permanently sick)
- outflow to temporarily sick and home duties.

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.



5.2 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 years' supply. In essence this is the number of workers of 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.

5.3 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. Thus 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 45, plumbers and electricians working in contracting are an integral part of the construction process. However, it is recognised by ConstructionSkills that SummitSkills has responsibility for these occupations across a range of SIC codes, including SIC 45.31 and 45.33.

Footprints for Built Environment SSCs

ConstructionSkills is responsible for SIC 45 Construction and part of SIC 74.2 Architectural and Engineering activities and related technical consultancy.

The table summarises the SIC codes (2003) covered by ConstructionSkills:

	SIC Code	Description
ConstructionSkills	45.1	Site preparation
	45.2	Building of complete construction or parts; civil engineering
	45.3	Building installations (except 45.31 and 45.33 which are covered by SummitSkills)
	45.4	Building completion
	45.5	Renting of construction or demolition equipment with operator
	74.2*	Architectual and engineering activities and related technical consultancy

* AssetSkills has a peripheral interest in SIC 74.2

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.

ConstructionSkills shares an interest with SummitSkills in SIC 45.31 Installation of wiring and fittings and SIC 45.33 Plumbing. ConstructionSkills recognises the responsibility of Summit Skills across Standard Industrial Classfications (SIC) 45.31 and 45.33, thus 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 in SIC 74.2.

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.

5.4 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, and decommissioning of nuclear power stations, onshore wind farms.

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 & 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.

5.5 Occupational groups

Occuptional group

Description, SOC 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

5.6 CSN website and contact details

The CSN website – http://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 research reports such as the '2020Vision' and 'Closer look at Greater London' are also freely available.

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
- CSN team contact information
- access to related ConstructionSkills research
- details for those interested in becoming members of the network.

The CSN website can be found at:
http://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 goes 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
- access sub-regional LMI reports
- 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
Construction Skills Network, contact
Lee Bryer
Research and Development
Operations Manager
0344 994 4400
Lee.bryer@cskills.org

http://www.cskills.org/contact-us/offices.aspx

Cskills website
http://www.cskills.org/

CSN webpage
http://www.cskills.org/supportbusiness/businessinformation/csn/index.aspx

Alliance
Sector Skills Councils