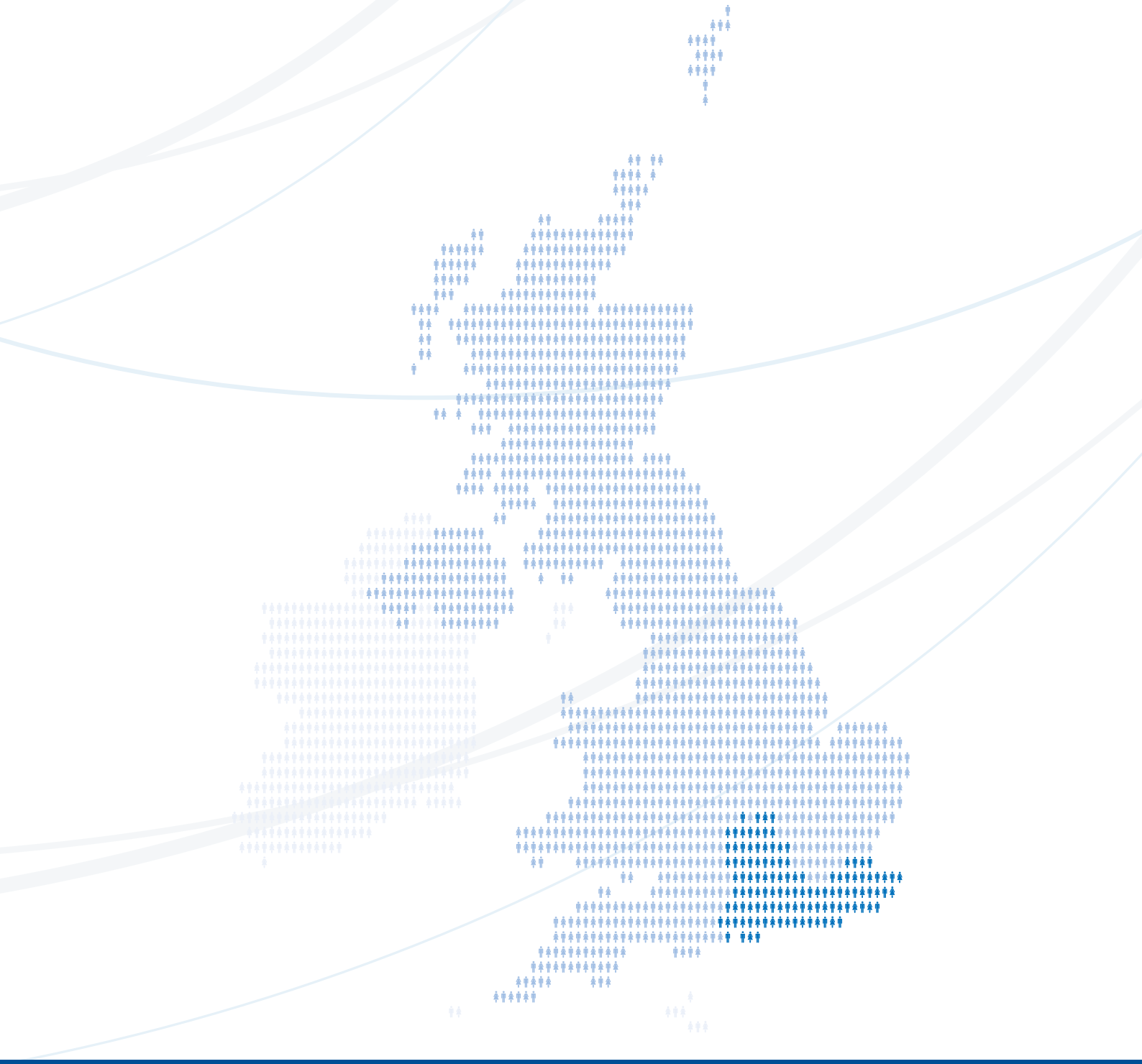

2012–2016 Construction Skills Network South East

LABOUR MARKET INTELLIGENCE

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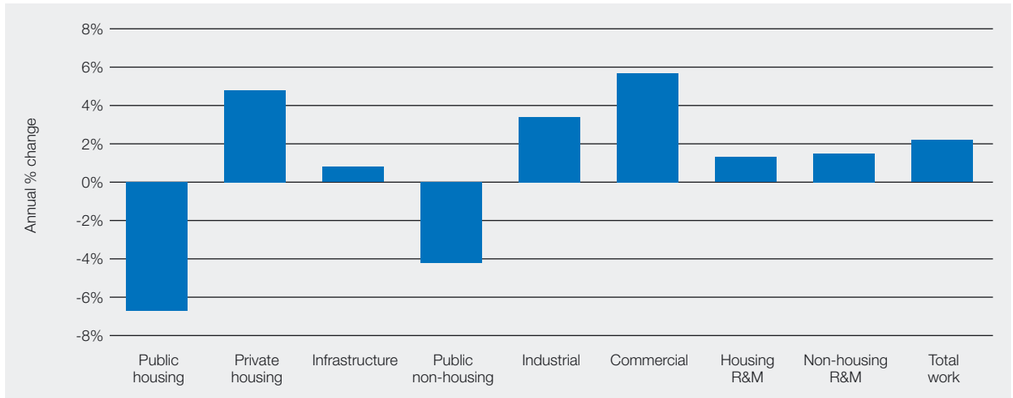
Contents

Tables and Charts

1. Summary – South East

Construction output in the South East is forecast to rise at an average annual rate of 2.2% over the five years to 2016, weaker only than the East of England and Greater London. It is also stronger than the UK average of 1.4%. New work output is expected to see growth of 2.6% per year on average, compared with just 1.4% for the repair and maintenance (R&M) sector. Construction employment in the region is expected to rise by 7.7% from 2012's projected level to total 408,140 in 2016. This is 5% higher than the previous peak in 2008.

Annual average construction output growth 2012-2016 - South East



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

Construction output is
forecast to rise
at an average annual rate
of 2.2% from 2012-2016

Key findings

The strong performance of the region is at least partly due to its relatively smaller exposure to the public sector, certainly on the non-housing side. The South East did not benefit from the Building Schools for the Future (BSF) programme as much as other regions and thus its public non-housing sector has less far to fall. It is forecast to decline by 4.2% per year on average over the period, compared with a figure of 9.1% for the UK as a whole.

The public housing sector in the South East, on the other hand, did fare quite well from the 2008-11 National Affordable Housing programme and therefore is likely to see output fall quite sharply in the shorter term. In the six months to September 2011, there were just 23 affordable housing units started in the region, according to statistics from the Homes and Communities Agency (HCA), compared with 2,683 units in the corresponding period of 2010, highlighting the bleak outlook for the sector over the next year or so.

Growth is expected to be strongest in the commercial and private housing sectors, with both benefitting from an improvement in conditions in the wider economy, which should stimulate demand. Credit conditions are also expected to ease, which should make it easier to obtain funding, both on the supply and the demand side. The region's industrial construction sector will also fare well, although this partly reflects a bounce back from the very low levels to which the sector fell to during the recession.

The region's infrastructure sector has seen strong growth in recent years, largely boosted by work gathering pace on M25 widening schemes. However, that is due to finish before the 2012 Olympics and there is nothing of a similar scale to replace this, although work is gathering momentum on the £850m redevelopment of Reading station, which should provide some boost to the sector. Average annual output growth in the South East's infrastructure sector is expected to be weak, but the level of output in the sector in 2016 will still be almost double its average over the 10 years to 2010.

Total construction employment in the South East is projected to total 378,960 in 2012 and will rise in each year of the forecast period to 2016. It is expected to rise at an average rate of 1.4% per year, substantially above the UK figure of 0.6%. In absolute terms, the largest increases are for electrical trades and installation (6,870) and building envelope specialists (2,470). However, in percentage terms, logistics personnel (29%) and civil engineers (25%) are likely to be most in demand.

The South East's ARR is equivalent to 1.2% of 2012 employment, a little weaker than the UK figure of 1.9%.

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 the South East

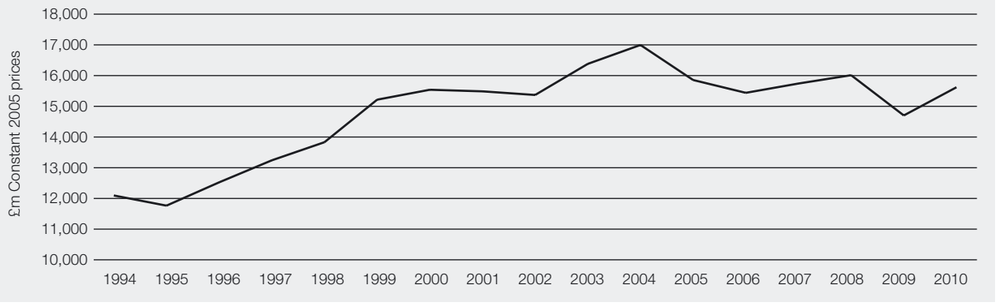
2.1 Construction output in South East – overview

After declining by 8% in 2009, construction output in the South East rose by 6% in 2010 to total £15.6bn, in 2005 prices. This growth was largely due to a marked increase in new work output, which rose by 14%, whilst repair and maintenance (R&M) output declined by 4%.

The industrial and commercial construction sectors were the only two new work ones to see output decline in 2010, by 17% and 12%, respectively. The outturn of £388m for the industrial sector was the lowest since at least 1990, the earliest year in our deflated regional data series in constant prices.

Growth was strongest in the public housing and infrastructure sectors, which saw output rise by 67% and 57%, respectively. The private housing (30%) and public non-housing (29%) sectors also recorded double-digit growth.

Construction output 1994-2010 - South East



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

2.2 Industry structure

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

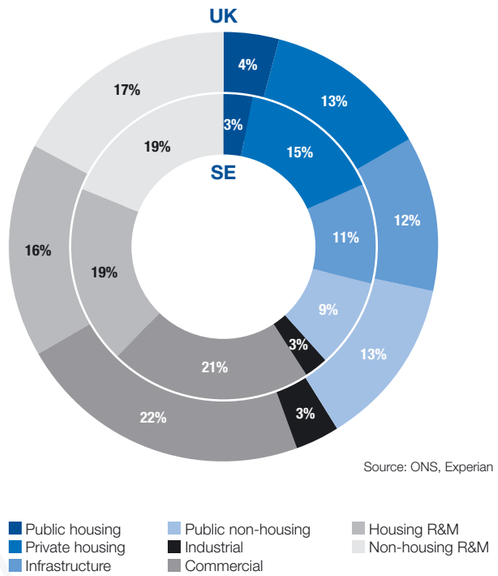
There are a number of differences in the structure of the South East's construction industry compared with the UK as a whole. The R&M sector in the region accounted for 38% of total construction output in 2010, in contrast to 33% on a national basis. Consequently, the public non-housing sector in the South East is much smaller, taking a 9% share of construction output in 2010, in contrast to the UK as a whole where it accounted for 13% of output.

The region's private housing sector is slightly larger than nationally, with shares of 15% and 13%, respectively. In contrast, although the infrastructure sector has seen output more than double between 2008 and 2010 it still accounts for a slightly smaller proportion of construction output in the region (11%) than nationally (12%).

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.

Construction industry structure 2010 - UK vs. South East



Source: ONS, Experian

Economic structure - South East (£ billion, 2006 prices)

Selected sectors	Actual	Forecast Annual % change, real terms					
	2010	2011	2012	2013	2014	2015	2016
Public services	37.9	2.5	-0.1	0.2	0.2	0.6	0.8
Financial and business services	47.3	1.1	2.3	3.1	3.3	3.6	3.6
Transport and communications	12.6	2.9	2.0	2.8	2.8	2.9	2.9
Manufacturing	16.0	3.0	3.1	3.6	2.8	2.2	1.6
Distribution, hotels and catering	26.4	1.3	1.0	2.3	2.6	2.8	3.1
Total Gross Value Added (GVA)	**167.3**	**1.7**	**1.3**	**2.2**	**2.4**	**2.6**	**2.6**

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

2.4 Economic structure

The South East's economy accounted for 14% of total UK Gross Value Added (GVA) in 2010, largely unchanged from the previous year. The region accounted for 13.7% of the UK population in 2010, suggesting that GVA per head is in line with the national average.

Total GVA in the South East totalled £167bn, in 2006 prices, in 2010, an increase of 1.9% on the previous year. This was broadly in line with the national figure (1.8%). The distribution, hotels and catering sector fared particularly well, as output rose by 3.5%, whilst growth of 2.7% was seen in transport and communications.

The South East has seen an increase in the relative importance of the financial and business services sector to its economy over the past decade or so. In 2007, the sector took a 22% share of output but that had increased to 28% by 2010. The sector saw one year of decline, 2009, before returning to growth in 2010, albeit by a modest 1.4%.

The South East economy is expected to have seen a further year of growth in 2011, rising by 1.7%, substantially stronger than the UK average of just 0.6%.

2.5 Forward looking economic indicators

GVA in the South East is forecast to rise in each year of the forecast period to 2016, increasing at an average rate of 2.2%. This is in line with the average growth rate forecast in 2010 for the 2011-2015 period. It is also stronger than the 1.8% average annual growth rate for the UK over the 2012-2016 period.

The financial and business services sector is expected to fare well over the forecast period, with output rising by 3.2% per year on average over the five years to 2016. Growth is also forecast to be strong in the transport and communications and manufacturing sectors (2.7%). In contrast, the public services sector is likely to see output increase at an annual average rate of just 0.3%.

Real disposable incomes in the UK are expected to have fallen by 2.3% in 2011, a second successive year of decline, but those in the South East have held up better, and likely to have seen just a 0.7% decline. High levels of inflation, weak wage growth, rising unemployment and tax increases have impacted on consumers' spending power. However, as they have not fallen as far, over the 2012-2016 period, real household disposable incomes in the South East are forecast to rise at an average rate of just 1%, substantially weaker than the national figure of 1.8%.

Unemployment in the South East is expected to rise during 2012, taking the unemployment to a high of 292,000, before falling markedly over the remaining years of the forecast period. In 2016, the unemployment in the region is expected to stand at around 196,000.

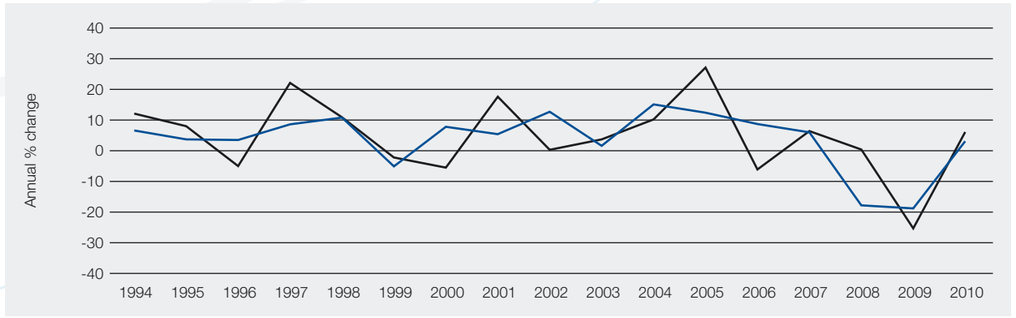
The average house price in the South East rose by 10% in 2010 to £266,216. After seeing a marginal fall in 2011, house prices are forecast to rise at an average rate of 3% per year, much weaker than the 7.4% over the decade to 2010.

Economic indicators - South East (£ billion, 2006 prices - unless otherwise stated)

	Actual	Forecast Annual % change, real terms					
	2010	2011	2012	2013	2014	2015	2016
Real household disposable income	135	-0.7	0.5	1.9	1.8	2.6	3.2
Household spending	132	-1.3	0.2	1.8	2.2	2.5	2.8
Working age population (000s and as % of all)	5,080	59.6	59.7	60.3	60.9	61.3	61.7
House prices (£)	266,216	-0.6	1.2	3.2	3.6	3.5	3.6
LFS unemployment (millions)	0.27	0.27	0.29	0.27	0.25	0.22	0.20

Source: Experian

New construction orders growth 1994-2010 - South East vs. GB



Source: ONS
ref. CSN Explained, Section 5.3, Note 4

2.6 New construction orders – overview

New construction orders rose by 6% in 2010 to total £7.4bn (in current prices) after falling by around a quarter in 2009.

New private housing orders rose by 45% in 2010, although this followed two years of marked decline, and the total of £1.8bn for the year was still just 76% of 2007's high. Infrastructure new orders also saw marked growth, rising by 32% to reach a 24-year high of £1.7bn. Public housing new orders rose by 29% to £465m.

The strongest decline was in the industrial sector, where new orders dropped by 51% to reach a record low of just £181m. Commercial construction new orders fell by 19%, whilst the public non-housing sector recorded a much weaker decline of 3%.

2.7 New construction orders – current situation

In the first half of 2011, total construction orders in the South East fell by 11% from the corresponding period of 2010 to £3.8bn (current prices). However, new orders in the region were 21% higher, half-year-on-half-year.

New industrial construction orders in the region jumped by 56%, year-on-year, in the six months to June 2011, albeit from a very low base. Commercial construction orders also rose strongly, increasing by 36% on an annual basis, with the outturn of £819m in the three months to June 2011 the strongest for two-and-a-half years. Private housing new orders also increased, growing by 19% from the corresponding period of 2010.

Infrastructure new orders in the region dropped by 64%, year-on-year, in the first half of 2011, although this was on the back of a particularly strong outturn in 2010. Public housing new orders declined by 35% over the same period, partly reflecting the winding down of the 2008-11 National Affordable Housing programme, before work picks up on the 2011-15 programme. Public non-housing new orders totalled £816m in the six months to June 2011, 14% below the corresponding period of 2010.

New work construction orders - South East (£ million, current prices)

	Actual	Annual % change				
	2010	2006	2007	2008	2009	2010
Public housing	465	45.4	13.6	-28.6	-7.9	28.5
Private housing	1,774	-5.1	5.5	-36.2	-18.4	45.2
Infrastructure	1,733	-65.5	63.3	-33.6	146.2	31.7
Public non-housing	1,503	-16.3	11.8	18.4	-11.0	-2.7
Industrial	181	11.9	-32.3	18.9	-41.6	-51.5
Commercial	1,788	17.1	4.8	25.9	-52.1	-18.7
Total new work	**7,444**	**-6.1**	**6.4**	**0.4**	**-25.3**	**6.1**

Source: ONS
ref. CSN Explained, Section 5.3, Note 4

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

Regional Office for National Statistics (ONS) output statistics are published in current prices and are thus inclusive of any inflationary effect. At the time of writing, ONS construction output statistics were only available for the first two quarters of 2011.

Construction output in the South East was up by 7% in the six months to June 2011, compared with the corresponding period of 2010, however it was marginally down on the previous half year. New work output rose by 11%, whilst R&M output was unchanged on an annual basis. Growth was strongest in the infrastructure (41%) and public housing (38%) sectors, although the public non-housing sector also saw output rise, by 10%, year-on-year.

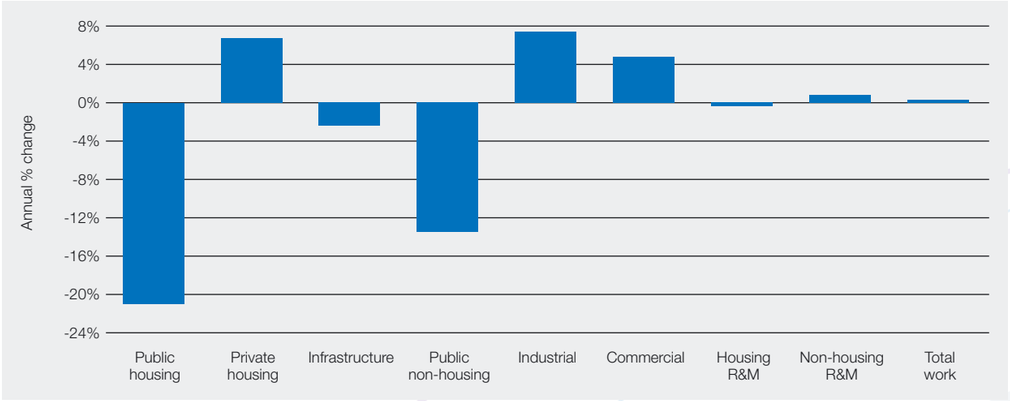
In the short term, construction output in the South East is expected to have fallen in 2011 and see a further decline in 2012 before returning to growth in 2013. On average, output is forecast to rise by a negligible 0.3% per year in 2012-13. The expected fall in output is largely due to poor performances from the public sectors, both housing and non-housing, as spending cuts begin to filter through to output.

The infrastructure sector is also forecast to see output decline, on average, over the 2012-13 period, albeit by a much weaker 2.4%. Work is due to be completed on the M25 widening schemes before the Olympic Games in 2012, and, although activity is picking up on the Reading station upgrade and various other schemes are ongoing, they are not as substantial as the M25 scheme, and thus output will decline in the short term.

Industrial construction output is expected to rise by 7.4% on average in the short term, although this partly reflects the levels to which output has fallen during the recession. The private housing sector is also expected to see strong growth, as conditions pick up in the wider economy, stimulating demand for housing.

Output in the commercial construction sector is expected to stagnate in 2012, following three years of marked declines, before returning to growth in 2013. Conditions in the wider economy remain tough, which is unlikely to encourage developers to start work on new facilities in the short term while demand is so weak.

Annual average construction output growth 2012-2013 - South East



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

Construction output - South East (£ million, 2005 prices)

	Actual	Forecast annual % change			Annual average
	2010	2011	2012	2013	2012-13
Public housing	498	3%	-30%	-12%	-21.0%
Private housing	2,376	5%	6%	7%	6.7%
Infrastructure	1,672	12%	-8%	3%	-2.4%
Public non-housing	1,467	0%	-23%	-3%	-13.5%
Industrial	388	1%	8%	7%	7.4%
Commercial	3,332	-7%	0%	10%	4.8%
New work	**9,733**	**1%**	**-5%**	**6%**	**0.3%**
Housing R&M	2,949	-2%	-1%	0%	-0.3%
Non-housing R&M	2,938	-6%	0%	2%	0.8%
Total R&M	**5,887**	**-4%**	**-1%**	**1%**	**0.2%**
Total work	**15,619**	**-1%**	**-3%**	**4%**	**0.3%**

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

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

Construction output in the South East is expected to rise at an average rate of 2.2% per year over the period to 2016, weaker only than the East of England and Greater London. It is also stronger than the national average of 1.8%, but slightly weaker than the 2.4% forecast for the region in last year's 2011-2015 report. New work output is forecast to see growth of 2.6% per year on average, compared with a weaker 1.4% annual average for R&M output.

The main factor in the South East's relatively good performance is that it is less exposed to public expenditure cuts. The region did not benefit as much from the Building Schools for the Future (BSF) programme as others in England and thus the sector has less far to fall. While the public non-housing sector is expected to see an annual average decline of 9.1% over the 2012-16 period at a national level, the sector is expected to only fall by 4.2% a year on average in the South East. Work is due to start on the first stage of a £420m Procure 21 project to redevelop the Royal Sussex Hospital in spring 2012, although Stage 2 construction is not due to start until after this forecast period.

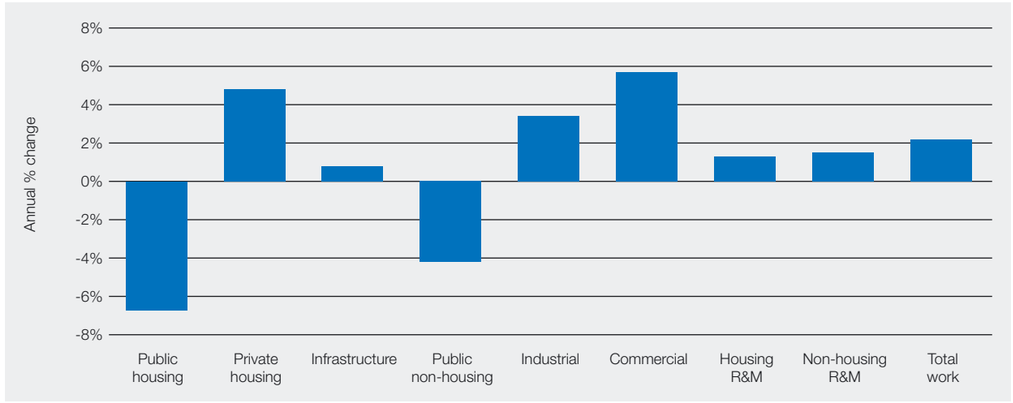
The public housing sector is also expected to see output fall in each year, on average, over the forecast period. The region benefitted strongly from the 2008-11 National Affordable Housing programme, receiving almost £1.5bn to fund 30,300 units over the period as a whole, taking output in the sector to a record high in 2010. The level of funding for affordable housing has been halved for the 2011-15 period for England as a whole, which will impact all regions. It is not possible to compare allocations for the South East between the two periods, due to changes in the Homes and Communities Agency's (HCA) operating areas.

Work on the M25 widening scheme has taken infrastructure construction output in the South East to its highest level since the Channel Tunnel construction in the early 1990s. The scheme is due for completion prior to the 2012 Olympic Games and although work on the Reading station improvement scheme should gain momentum, growth is expected to moderate over the forecast period, and output will rise by just 0.8% per year on average. Planning permission has recently been granted for a £400m second ferry terminal in Dover, however it will only be built if and when market conditions require its construction. This suggests that it may well not be until the end of this forecast period that work begins on the project.

Growth in the South East is expected to be strongest in the commercial and private housing sectors, with average annual rates of 5.7% and 4.8%, respectively, over the five years to 2016. These sectors are both being particularly affected by the weakness in the macro economy and should benefit from an uplift in demand as conditions improve and credit conditions continue to ease making financing easier for both developments and potential homeowners. A number of developments have been put on hold while conditions have remained weak and it is likely that they will start in the next year or so, once there is evidence of a more sustained recovery.

The industrial construction sector in the South East is forecast to see modest growth over the five years to 2016. Stronger growth in the shorter term is largely a bounce back following the substantial output falls in the recession. There are a few schemes which are due to start during the forecast period, such as a £140m project to construct twelve industrial units in Rochester, with work due to commence at the end of 2011 or beginning of 2012.

Annual average construction output growth 2012-2016 - South East



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

Construction output - South East (£ million, 2005 prices)

	Estimate	Forecast annual % change					Annual average
	2011	2012	2013	2014	2015	2016	2012-16
Public housing	515	-30%	-12%	1%	8%	4%	-6.7%
Private housing	2,498	6%	7%	5%	4%	2%	4.8%
Infrastructure	1,872	-8%	3%	4%	3%	2%	0.8%
Public non-housing	1,460	-23%	-3%	-2%	4%	5%	-4.2%
Industrial	391	8%	7%	1%	1%	-1%	3.4%
Commercial	3,108	0%	10%	7%	6%	6%	5.7%
New work	**9,843**	**-5%**	**6%**	**4%**	**4%**	**4%**	**2.6%**
Housing R&M	2,894	-1%	0%	3%	3%	1%	1.3%
Non-housing R&M	2,766	0%	2%	2%	2%	2%	1.5%
R&M	**5,660**	**-1%**	**1%**	**3%**	**2%**	**1%**	**1.4%**
Total work	**15,503**	**-3%**	**4%**	**4%**	**4%**	**3%**	**2.2%**

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

2.10 Beyond 2016

Post-2016, there are a number of wind farms planned in the region, including a £1.4bn offshore project near the Isle of Wight. Construction could get underway at the very end of the forecast period, with the majority of the work on the 0.9GW wind farm due to take place after the forecast period.

Refurbishment work relating to energy efficiency and microgeneration measures is likely to gain importance as a driver of construction output in the South East, as it is across the UK as a whole. Increasing concerns over rising energy prices and carbon emissions targets are expected to stimulate demand for these measures.

The High Speed 2 rail project to link London and Birmingham is currently projected to start in 2017. A significant amount of work will take place in the South East as the current proposed route drives through the Chilterns. The base construction costs and contractor administration costs were estimated by High Speed Two Ltd in December 2009 at £6.8bn.

3. Construction employment forecasts for South East

3.1 Total construction employment forecasts by occupation

The table presents actual construction employment (SICs 41-43, 71.1, and 74.9) in the South East 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.

Construction employment in the South East totalled 376,190 in 2010 and is expected to increase by a marginal 0.7% over the period to 2012. Construction employment is expected to rise in each year of the forecast period to 2016 to total 408,140, 7.7% higher than 2012's projected level.

In absolute terms, the largest increase in employment between 2012 and 2016 is expected to be for electrical trades and installation (6,870), making it the largest trade occupation in the region by 2016, overtaking wood trades and interior fit-out. Other occupations forecast to see large increases in employment are building envelope specialists (2,470) and other construction professionals and technical staff (2,200). Workers in these occupations are required across a number of sectors, and will thus be able to benefit from strong growth in the commercial and private housing sectors.

The occupations expected to see the largest increases in percentage terms are logistics personnel (29%), civil engineers (25%) and electrical trades and installation (21%).

Total employment by occupation - South East

	Actual	Forecast	
	2010	2012	2016
Senior, executive, and business process managers	21,910	21,810	26,700
Construction managers	44,920	43,910	45,610
Non-construction professional, technical, IT, and other office-based staff	53,310	55,750	59,570
Wood trades and interior fit-out	36,470	33,680	35,100
Bricklayers	10,010	11,080	10,980
Building envelope specialists	16,010	14,510	16,980
Painters and decorators	19,570	17,810	18,260
Plasterers and dry liners	5,480	5,560	5,440
Roofers	6,190	5,810	6,970
Floorers	5,070	5,270	4,960
Glaziers	3,680	3,780	3,180
Specialist building operatives nec*	6,520	7,190	6,050
Scaffolders	2,450	2,240	2,180
Plant operatives	3,800	4,200	3,940
Plant mechanics/fitters	4,250	3,800	3,820
Steel erectors/structural	3,960	3,760	3,530
Labourers nec*	11,080	10,100	12,070
Electrical trades and installation	30,320	32,610	39,480
Plumbing and HVAC trades	24,960	26,720	26,710
Logistics	4,560	5,030	6,490
Civil engineering operatives nec*	7,140	7,470	8,340
Non–construction operatives	4,940	4,540	5,520
Civil engineers	7,760	7,080	8,880
Other construction professionals and technical staff	29,620	32,650	34,850
Architects	3,650	3,360	3,350
Surveyors	8,560	9,240	9,180
Total (SIC 41-43)	**326,600**	**326,630**	**351,880**
Total (SIC 41-43, 71.1, 74.9)	**376,190**	**378,960**	**408,140**

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.

The ARR for the 26 occupations within the South East's construction industry is illustrated in the table. The figure of 4,520 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 region's ARR is equivalent to 1.2% of projected employment in 2012, weaker than the 1.9% for the UK as a whole. In absolute terms, the largest requirements for construction-specific occupations are for logistics personnel (950), civil engineering operatives nec* (610) and glaziers (450).

In terms of the percentage of base 2012 employment, logistics personnel (19%) and glaziers (12%) are also expected to be in high demand.

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 - South East

	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	-
Building envelope specialists	70
Painters and decorators	-
Plasterers and dry liners	-
Roofers	-
Floorers	-
Glaziers	450
Specialist building operatives nec*	220
Scaffolders	-
Plant operatives	360
Plant mechanics/fitters	-
Steel erectors/structural	<50
Labourers nec*	970
Electrical trades and installation	220
Plumbing and HVAC trades	-
Logistics	950
Civil engineering operatives nec*	610
Non–construction operatives	-
Civil engineers	410
Other construction professionals and technical staff	-
Architects	240
Surveyors	-
Total (SIC 41-43)	**3,870**
Total (SIC 41-43, 71.1, 74.9)	**4,520**

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

4. Comparisons across the UK

With an average annual output growth rate of 2.2% from 2012-2016, the South East is one of the better performing regions and above the overall UK growth rate of 1.4%. The best performing region is expected to be the East of England with a rate of 2.9%, while 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.

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 what 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.

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-residential 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 BSF programme. The South East did not benefit as much as many other regions from the BSF programme and thus it has less far to fall once the remaining projects complete.

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 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. Once the M25 widening has completed, it will be work on Reading station that will drive infrastructure output in the South East, however, growth will be more modest than over the past few years.

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.

Given that the South East is expected to be one of the best performing regions over the 2012-2016, it is not surprising that the prospects for construction employment in the region are also strong, with employment forecast to rise at an average rate of 1.4% a year. 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 repair and maintenance sectors. Not surprisingly, employment growth is also stronger than the UK average in the East of England, Greater London and the South West.

The South East's ARR is equivalent to 1.2% of 2012 employment, slightly weaker than the UK figure of 1.9%.

In the South East, growth is expected to be strongest in the **Commercial (5.7%) and Private Housing (4.8%) sectors**

Annual average output growth by region 2012-2016

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

Annual recruitment requirement (ARR) by region 2012-2016

Source: CSN, Experian

Employment in the region is expected to rise by **7.7% from 2012** to total 408,140 by 2016

5. CSN explained

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

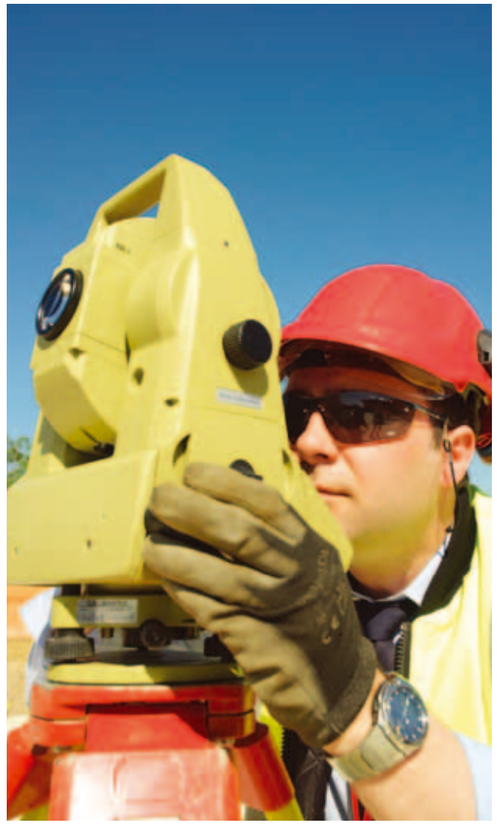
Section 5.1 gives an overview of the underpinning methods that are used by the CSN, working in partnership with Experian, to produce the suite of reports at both a UK, national and regional level.

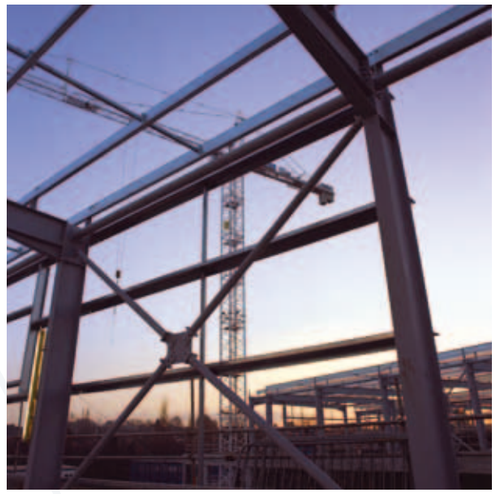
Section 5.2 provides a glossary to clarify some of the terms that are used in the reports, while section 5.3 has some further notes that relate to the data sources that are used for the various charts and tables. Section 5.3 also outlines what is meant by the term footprint, when talking about the areas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

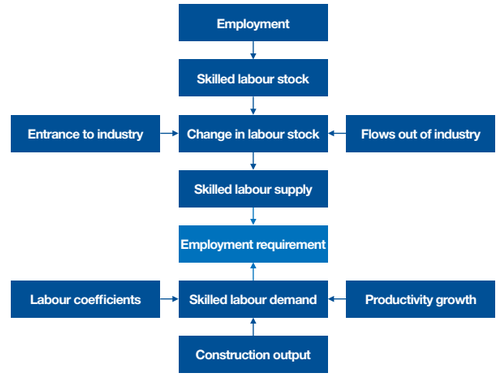
- transfers to other industries
- international/domestic OUT migration
- permanent retirements (including permanently sick)
- outflow to temporarily sick and home duties.

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:
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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
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