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In association with Experian

Construction Skills Network

North East 2014-2018

Labour Market Intelligence

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

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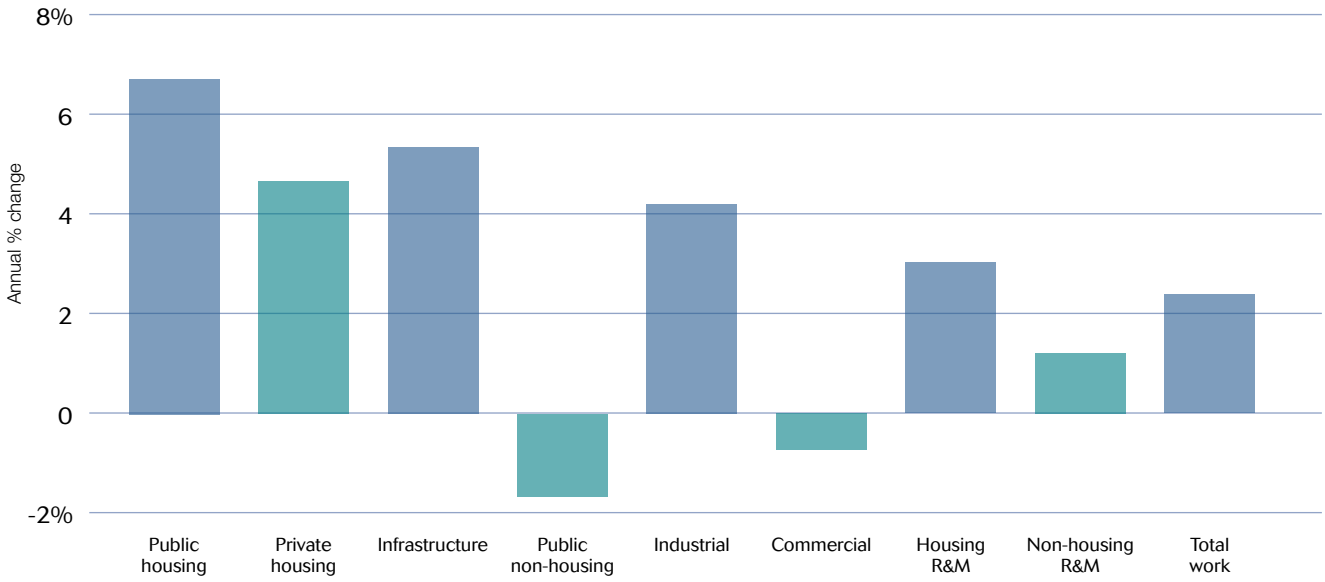
CSN explained

1 Summary – North East

The North East is predicted to see an annual average increase of 2.4% in construction activity over the forecast period, performing better than the UK as a whole, where annual average growth of 2.2% is projected. Construction employment is likely to be around 97,750 in 2018, 3% higher than in 2013. The region accounts for 7.4% of the total UK annual recruitment requirement (ARR) and it represents 2.8% of total projected base 2014 employment in the North East, higher than the UK figure of 1.5%.

Annual average construction output growth 2014-2018 – North East



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

1.1 Key findings

The best performing sector is expected to be public housing, with annual average output growth of 6.7% over the next five years. However, the market will be coming back from low levels and, by the end of the forecast period, the outturn for the sector will still be around 40% smaller than its 2010 peak. It should also be noted that the sector is small and percentage growth figures can be volatile.

One large project planned for the sector has been announced by Newcastle City Council, which plans to spend around £130m building 1,200 new homes on council-owned land by 2017.

The infrastructure sector is likely to experience annual average increases of 5.3% between 2014 and 2018. MGT Power Ltd's new £400m biomass power plant is likely to be the main driver of growth in the sector under both short term and longer term forecasts. However, other medium-sized projects planned for the region are due to take place in the latter half of the forecast period so will also contribute towards the sector's growth levels.

Private housing output is projected to expand by 4.7% a year on average, driven by better economic conditions and funding schemes such as Help to Buy. However, estimated output in 2013 was only 65% of its 2007 peak, so it will be recovering from a relatively low base.

Over the 2014-2018 forecast period, public non-housing and commercial are the only sectors that are likely to register average annual declines, of 1.6% and 0.6% respectively. Financial constraints means that the former will subside to pre-Building Schools for the Future levels, while the latter may struggle to see growth before 2016, when better economic conditions should begin to filter through into investment decisions regarding the North East.

Total construction output growth in the region (2.4% vs. 2.2%) is slightly higher than that of the UK as a whole, yet the annual average employment growth is significantly lower (0.6% vs. 1.2%). This is partly because the North East is one of the regions where output fell much more strongly than employment from its pre-recessionary peak (31% vs. 13%), suggesting that there is significant excess capacity in the market at present.

The region's ARR, at 2,680, represents 2.8% of the total projected base 2014 employment, higher than the UK average (1.5%). The largest absolute requirement is for construction trade supervisors but, as a share of 2014 base employment, wood trades and interior fit-out occupations will be the most sought after, at 7%.

Regional comparison 2014-2018

	Annual average % change in output	Change in total employment	Total ARR
North East	2.4%	2,660	2,680
Yorkshire and Humber	2.2%	8,590	3,170
East Midlands	1.1%	5,910	1,980
East of England	3.0%	24,220	5,150
Greater London	2.0%	27,490	1,290
South East	2.9%	28,900	1,600
South West	3.5%	16,700	6,370
Wales	3.4%	9,490	3,570
West Midlands	0.8%	-2,090	380
Northern Ireland	2.3%	3,400	1,280
North West	1.3%	10,300	2,970
Scotland	2.0%	12,240	5,960
UK	2.2%	147,810	36,400

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

2 The outlook for construction in the North East

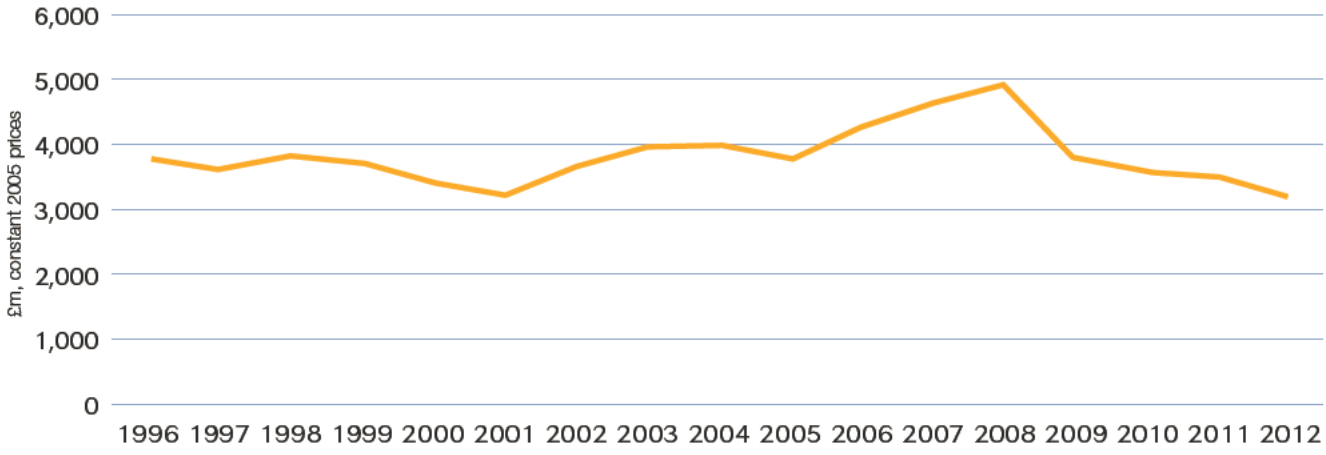
2.1 Construction output in the North East – overview

In 2012, construction output in the region fell for the fourth consecutive year, by 7% to £3.2bn. The new work sector declined by 5% to £2.4bn and the repair and maintenance sector (R&M) fell by 13% to £794m.

Due to low levels of funding from the current 2011-2015 Affordable Homes Programme (AHP), which combines allocations for the North East and Yorkshire and the Humber, when compared to the previous 2008-2011 AHP for the region it should come as no surprise that the North East's public housing sector experienced the greatest falls, of 75% in 2012. In fact, of all regions and devolved nations, the North East's public housing sector registered the largest falls, with the overall UK decline much smaller at 14%.

The region's industrial sector saw the largest growth, of 46%, to £269m. A large contributor to this increase in output was work on projects such as Nissan's £125m Sunderland plant and Akzo Nobel's £100m manufacturing plant in Ashington.

Construction output – North East 1996-2012



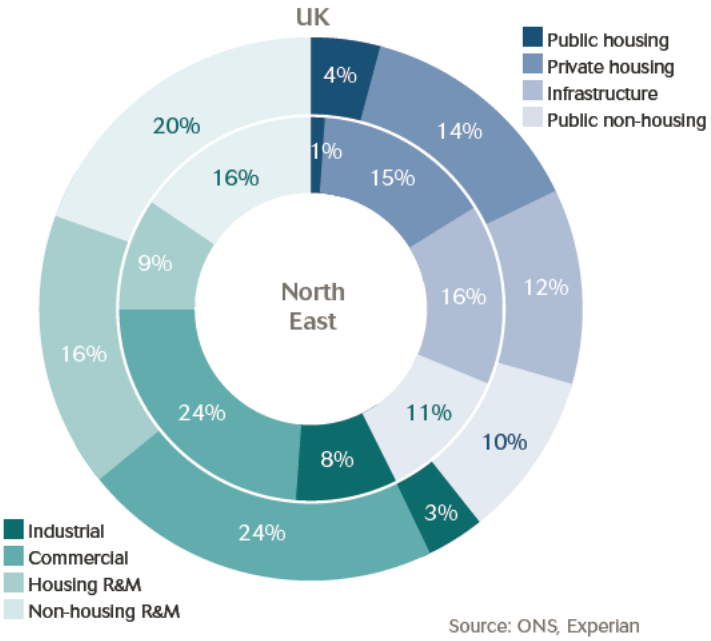
Source: ONS
ref. CSN Explained, Section 3, Note 1

2.2 Industry structure

The diagram, Construction industry structure 2012 – UK vs. North East, illustrates the sector breakdown of construction in the North East compared to that in the UK as a whole. The percentages for each sector illustrate the proportion of total output accounted for by each sector.

The structure of the North East's construction market is significantly different to that of the UK as a whole. The region's new work sector (75%) as a proportion of total output is significantly larger than in the UK as a whole (64%). The industrial sector accounted for 8% of construction output in the North East in 2012, compared with 3% in the UK as a whole, whilst the infrastructure sector in the region was also much larger at 16% versus the national average of 12%. The share for the commercial sector was also 3% bigger, at 24% when compared to the nation as a whole. In contrast, the shares for the housing R&M (9% vs. 16%), non-housing R&M (16% vs. 20%) and public housing (1% vs. 4%) sectors were much smaller than those of the UK as a whole.

Construction industry structure 2012 UK vs. North East



Source: ONS, Experian

2.3 Economic overview

The expected performance of a regional or national economy over the forecast period (2014-2018) provides an indication of the construction sectors in which demand is likely to be strongest.

2.4 Economic structure

In 2012 gross value added (GVA) in the region edged up by 0.9% to £41.2bn at 2010 prices. As a share of the UK, the North East accounted for 3% of GVA in 2012.

Public services accounted for the greatest share of the region's GVA at 25%, whilst professional and other private services came in second at 20%. The manufacturing sector and wholesale and retail sector were ranked third and fourth respectively. Whilst the top two sectors experienced growth in 2012, both the manufacturing and wholesale and retail sectors registered falls in output.

The strongest growth was seen in the accommodation, food services and recreation (9.9%) sector in 2012, but the sector only accounted for about 5% of output in the North East in that year.

Economic structure – North East (£ billion, 2010 prices)

Selected sectors	Actual	Forecast *Annual % change, real terms*					
	2012	2013	2014	2015	2016	2017	2018
Public services	10.2	1.2	0.3	0.4	0.7	0.9	1.4
Professional and other private services	8.4	2.6	2.2	1.9	2.2	2.1	2.0
Manufacturing	6.4	-1.5	1.8	1.0	1.0	0.8	0.8
Wholesale and retail	3.7	4.3	1.8	1.9	2.2	2.1	2.1
Information and communication	2.3	4.1	2.4	2.2	2.7	2.5	2.5
Total Gross Value Added (GVA)	41.2	0.9	1.4	1.4	1.7	1.7	1.8

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

2.5 Forward-looking economic indicators

GVA in the North East is estimated to have expanded by 0.9% in 2013, the same rate as the previous year. Over the 2014 to 2018 period, GVA is projected to grow at an annual average rate of 1.6%, more slowly than the UK average of 2%.

Lacklustre annual average growth of 0.7% is likely to be seen in the largest sector, public services, which is not a great surprise given ongoing financial constraints. The second largest sector, professional and other private services, is likely to perform better, with growth of 2.1% a year over the five year period to 2018. Manufacturing is predicted to see annual average growth of 1.1%, while for wholesale and retail the corresponding figure is 2%.

As the economy begins to see more of a sustained recovery and the employment situation in the region begins to improve, real household disposable income growth should begin to pick up slowly over the forecast period. It is forecast to reach 1.9% in 2018, which would be the highest yearly growth rate since 2009. With this increase, household spending also sees an upward trend over the five years to 2018. However, this is slower growth than across the UK as a whole.

Employment in the North East on the Workforce Jobs measure is estimated at 1.16m in 2013 and is projected to expand at an average annual rate of 0.6% in the five years to 2018. The estimated unemployment rate for the region in 2013, at 10%, is well above the UK average (7.8%), although it is forecast to drop to 8.1% by 2018.

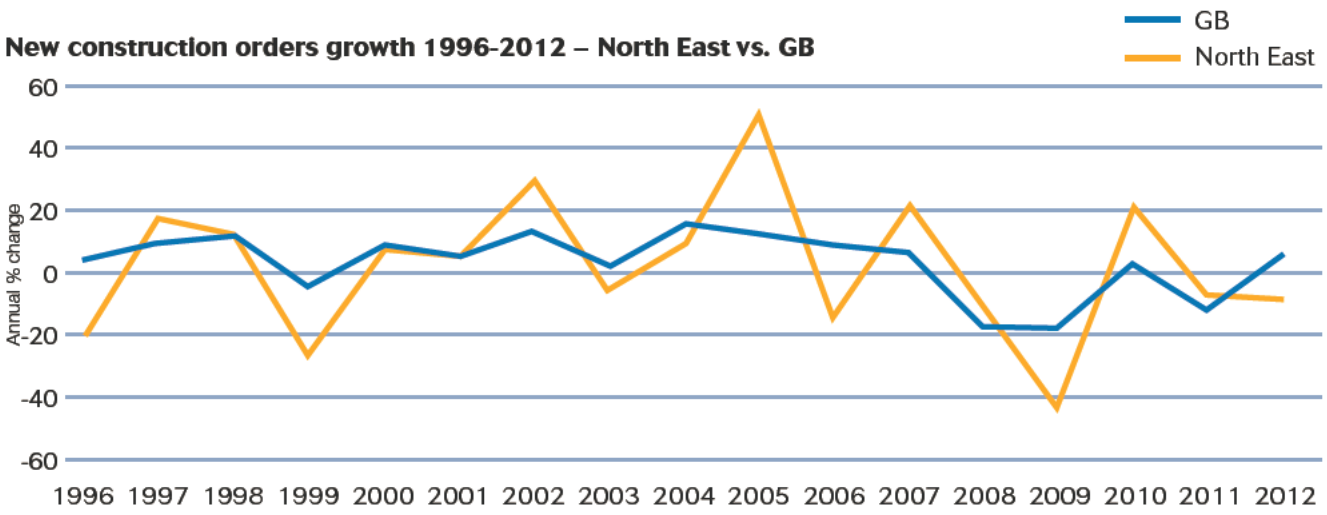
The working age population stood at 1.617m in 2012 and is predicted to rise as a share of total population over the forecast period, while house prices are estimated to experience small annual growth over the same timeframe.

Economic indicators – North East (£ billion, 2010 prices – unless otherwise stated)

	Actual	Forecast *Annual % change, real terms*					
	2012	2013	2014	2015	2016	2017	2018
Real household disposable income	35	-1.2	0.7	1.0	1.3	1.6	1.9
Household spending	35	1.3	1.3	1.4	1.8	2.0	2.0
Working age population (000s and as % of all)	1,617	61.8%	62.1%	62.4%	62.6%	62.7%	62.7%
House prices (£)	143,313	1.5	1.0	1.5	1.6	1.6	2.0
LFS unemployment (millions)	0.13	-3.07	-2.11	-6.96	-4.01	-3.45	-3.77

Source: ONS, DCLG, Experian

New construction orders growth 1996-2012 – North East vs. GB



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

2.6 New construction orders – overview

New construction orders in the North East fell for the second consecutive year in 2012, by 9% to £1.5bn, which was just under half their 2007 peak. The infrastructure sector registered the greatest decline of 75%, to just £140m, whilst the public non-housing sector saw a decrease of 31%, taking the value of orders to £231m. The North East's commercial (£440m) and industrial (£175m) construction orders both went up, with the former growing by 4% and the latter by 21%. The strongest increase was seen in the private housing sector, as orders jumped by 170% to £518m. The public housing sector also experienced robust expansion of 60% to £24m.

2.7 New construction orders – current situation

In the first six months of 2013, new work orders rose by 45% to £1.3bn when compared with the corresponding period in the preceding year. Public housing new orders increased tenfold to £114m but from a very low base. The infrastructure sector also saw a very large jump in new orders, from £46m in the first half of 2012 to £383m in the same period of 2013. In contrast, orders for the industrial sector saw the greatest decline, of 72% to £30m.

2.8 Construction output – short-term forecasts (2014-2015)

Regional Office for National Statistics (ONS) output statistics are published in current prices and are therefore inclusive of any inflationary effect. At the time of writing, ONS construction output statistics were only available for the first two quarters of 2013.

In the first six months of 2013, total output in the region went up by 2% to £1.8bn when compared with the corresponding period in the preceding year. While the public housing market registered the greatest rise of 52%, to £32m, the public non-housing sector saw the largest fall, of 36%, to £132m.

Over the next two years total construction output in the North East is anticipated to grow by an annual average of 1.9%. The new work sector is projected to see annual average increases of 1.7%, while the R&M sector is forecast to experience higher growth of 2.4%

New work construction orders – North East (£ million, current prices)

	Actual	Annual % change, real terms				
	2012	2008	2009	2010	2011	2012
Public housing	24	-27.7	-25.9	153.3	-90.1	60.0
Private housing	518	-53.2	-50.0	179.7	-66.0	169.8
Infrastructure	140	-46.9	1.2	112.8	209.3	-75.3
Public non-housing	231	102.1	-14.8	-39.0	-16.8	-30.6
Industrial	175	-20.0	-62.8	-9.5	38.1	20.7
Commercial	440	-4.0	-63.0	7.1	0.5	3.8
Total new work	1,528	-9.9	-44.2	20.5	-8.2	-8.8

Source: ONS, Experian. Ref. CSN Explained, Section 3, Note 4

Construction output 2014-2015 – North East (£ million, 2005 prices)

	Actual	Forecast *Annual % change*			Annual average
	2012	2013	2014	2015	2014-15
Public housing	32	102%	16%	12%	13.7%
Private housing	478	23%	9%	5%	7.0%
Infrastructure	491	-1%	2%	10%	6.1%
Public non-housing	363	-28%	-7%	-2%	-4.6%
Industrial	269	-29%	13%	7%	10.1%
Commercial	754	6%	-9%	-5%	-6.6%
New work	2,386	0%	0%	3%	1.7%
Housing R&M	296	15%	3%	4%	3.6%
Non-housing R&M	498	3%	2%	1%	1.6%
Total R&M	794	8%	3%	2%	2.4%
Total work	3,181	2%	1%	3%	1.9%

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

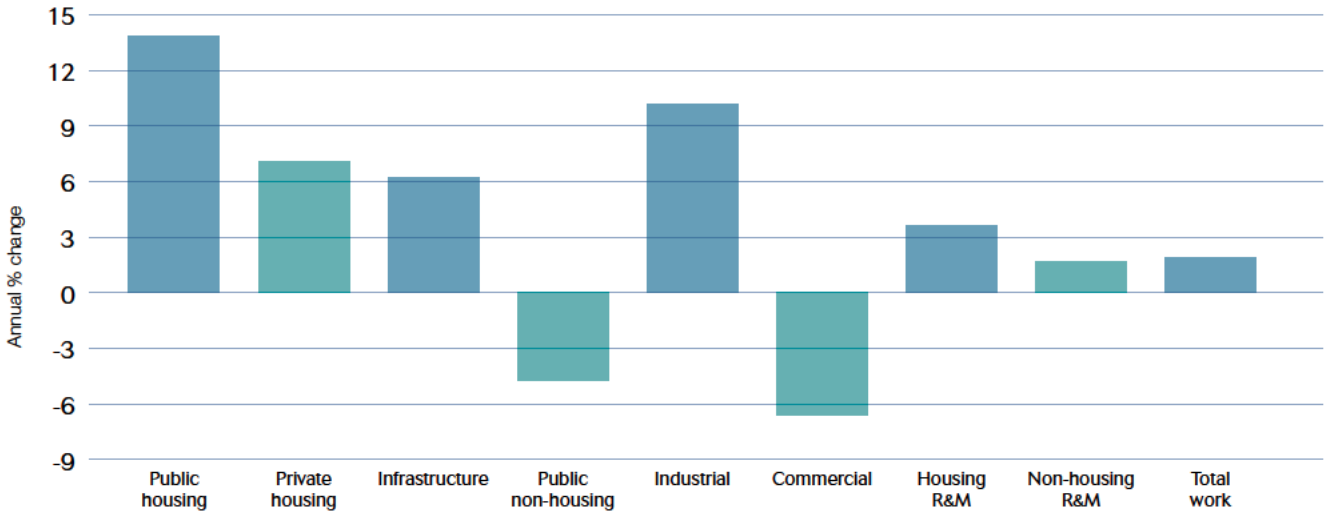
per year. Significant differences are projected for sector performance over the next two years as the industry in the North East starts its recovery from a period of severe contraction.

The public housing market is estimated to see the greatest annual average increase, of 13.7% over the two years to 2015. Given the recent upsurge in public new housing orders, 2013 output levels are expected to be just over twice 2012 levels. While this is exceptional growth for the sector, and the highest for all regions and devolved nations, it is important to remember that the market is small and will be coming back from a very low base. The rate of expansion in 2014 and 2015 is expected to be much more modest in comparison, at 16% and 12% respectively. A high number of providers have already secured sufficient funding for projects, with the Homes and Communities Agency's Quarterly Survey of Private Registered Providers 2013/14 for the second quarter showing that just over 90% of respondents believe that their current debt facilities are sufficient for more than a year.

Industrial output is forecast to see the second highest level of growth over the next two years as an average increase of 10.1% is predicted. As GDP and exports improve, growth should return over the next two years. A recent project announced in the sector is from Offshore Group Newcastle, which has been given the green light to build a £50m factory to make parts for offshore wind turbines. The project is due to start in 2014.

An annual average rise of 7% per year between 2014 and 2015 is estimated for the private housing sector. The region is predicted to have experienced double digit growth last year due to the Government's Help to Buy scheme. However, the increase in output is likely to be more modest during the following two years. Plans have been revealed for the first new homes at the £200m housing development on Mount Oswald Golf Course in Durham. Part of the first phase includes 61 units on a 12 acre section, consisting of four and five bedroom homes. It is thought that work on the two-year scheme could begin in early 2014, with the

Annual average construction output growth 2014-2015 – North East



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

Public housing is the best performing sector with an average output growth of 6.7% over the next five years

first residents moving in before the end of the year. Work in the other phases includes accommodation for around 1,000 students, 'an exclusive millionaires' row' and community facilities.

The infrastructure sector is projected to experience annual average growth of 6.1% in the two years to 2015. Unfortunately, the £118m New Wear Crossing scheme, which was due to start in the second half of 2013 was scrapped when neither bidder (Vinci and Graham) could bid for the project within its budget. However, a large scheme due to start in 2014 is MGT Power Ltd's new £400m 300MW biomass power plant, in Redcar and Cleveland. Once the three-year project is complete the facility will burn imported clean wood chips from sustainable sources and should be able to power 600,000 homes.

The commercial sector is predicted to be the worst performing one, with a decline of 6.6% expected per year between 2014 and 2015. Over the short term there is little evidence of any large projects starting in the sector and by 2015 the commercial market is expected to be less than 50% of its 2008 peak.

The only other sector likely to register falls in the short term is the public non-housing sector, with annual average decreases of 4.6%. The North East benefitted heavily from the now-scrapped Building Schools for the Future programme and as a result the outturn for the sector has been on a downward trend since output levels peaked in 2010.

2.9 Construction output – long-term forecasts (2014-2018)

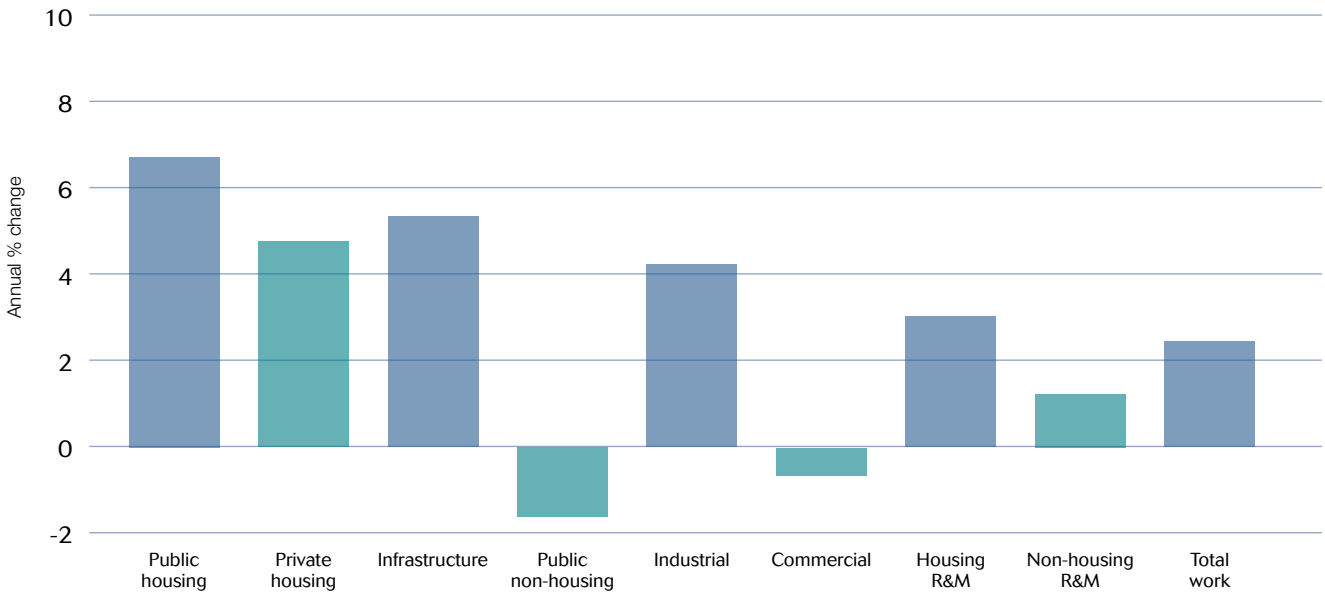
The region's construction industry is projected to see annual average output growth of 2.4% over the next five years. Unlike the short term case, the R&M sector (1.9%) in the period to 2018 is predicted to experience a weaker expansion than the new work one (2.5%).

With annual rises of 6.7% over the next five years, public housing is expected to be the best performing sector. Newcastle City Council plans to spend around £130m building 1,200 new homes on council-owned land by 2017. Your Homes Newcastle, the council's arms-length housing management organisation, will construct around 750 homes, with the rest being built by housing associations and other affordable housing providers. This housing project is part of a wider £450m construction scheme that is run by the council. The market will be coming back from low levels and, by the end of the forecast period, the outturn for the sector is going to be around 40% smaller than its 2010 peak.

The infrastructure sector is predicted to see an increase of 5.3% per year on average between 2014 and 2018. MGT Power Ltd's new £400m biomass power plant is likely to be a key driver of activity in the sector both over the short and longer term, and this will be joined by other projects in the latter part of the forecast period. These include the £180m extension of Riverside Quay at Tyne Dock. As part of the three-year project, new infrastructure for transport, handling and storage facilities for imports of wood pellet will also be developed.

Annual average increases of 4.7% and 4.2% over the long term are expected to be seen for the private housing and industrial sectors. In contrast, the corresponding figure for the commercial sector is -0.6%. However, this sector will start to see a

Annual average construction output growth 2014-2018 – North East



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

Construction output 2014-2018 – North East (£ million, 2005 prices)

	Estimate	Forecast *Annual % change*					Annual average
	2013	2014	2015	2016	2017	2018	2014-18
Public housing	64	16%	12%	2%	1%	4%	6.7%
Private housing	589	9%	5%	4%	2%	3%	4.7%
Infrastructure	484	2%	10%	5%	4%	5%	5.3%
Public non-housing	260	-7%	-2%	-1%	0%	2%	-1.6%
Industrial	191	13%	7%	3%	0%	-1%	4.2%
Commercial	799	-9%	-5%	2%	4%	5%	-0.6%
New work	2,387	0%	3%	3%	3%	4%	2.5%
Housing R&M	342	3%	4%	2%	3%	2%	3.0%
Non-housing R&M	514	2%	1%	3%	1%	-1%	1.2%
R&M	856	3%	2%	2%	2%	0%	1.9%
Total work	3,243	1%	3%	3%	2%	3%	2.4%

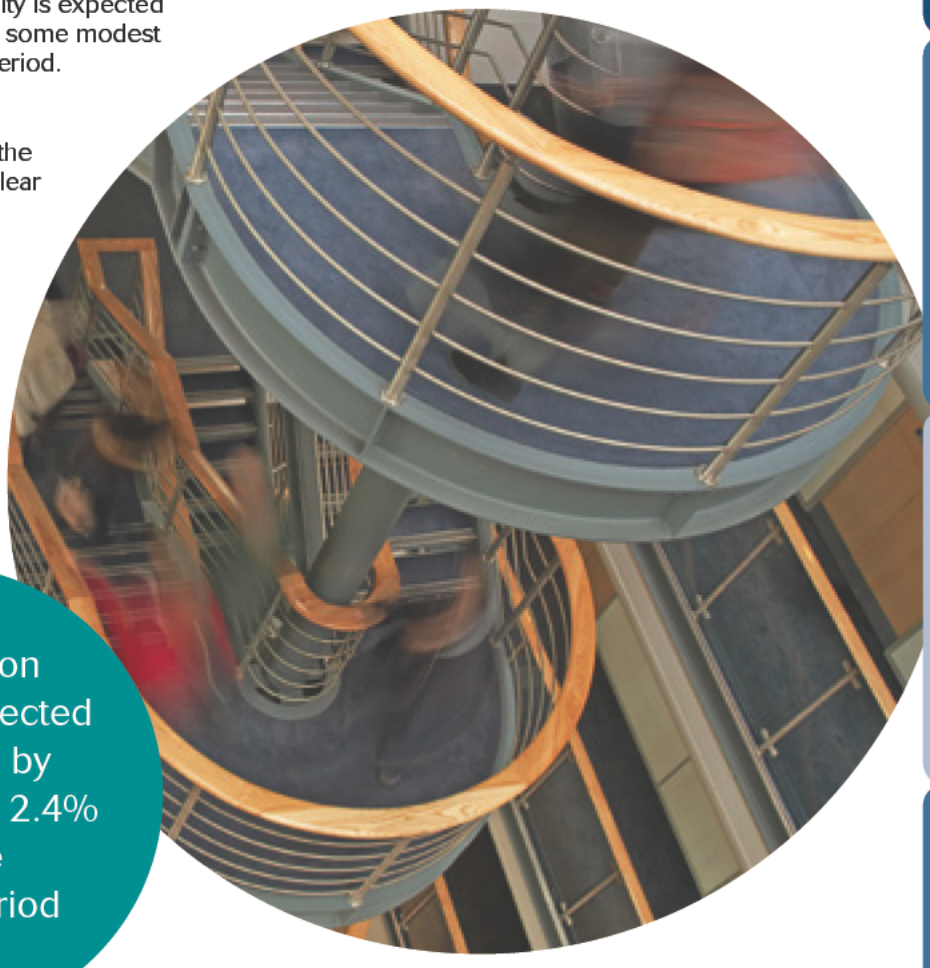
Source: CSN, Experian.
Ref. CSN Explained, Section 3, Note 2

turnaround in 2016, when growth of 2% is likely due to the sustained improvements in the economy.

Public non-housing output is projected to continue to subside to 2016, when it will have contracted to levels seen in the early 2000s before the Building Schools for the Future programme took off. Activity is expected to stabilise thereafter and perhaps show some modest growth in the final year of the forecast period.

2.10 Beyond 2018

Work is scheduled to begin in 2019 on the decommissioning of British Energy's nuclear power station in Hartlepool and will last for five years. However, closure of this facility was predicated on the start of construction of a replacement nuclear facility in the 2015 to 2020 period but this scheme has fallen out of the current nuclear new build pipeline. While that does not mean that it will never be built, a start is unlikely before the late-2020s at the earliest.



Construction activity is expected to increase by an average of 2.4% over the forecast period

3 Construction employment forecasts for the North 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 North East for 2012, the estimated total employment across 28 occupational categories in 2013 and forecasts for the industry for 2014 to 2018. A full breakdown of occupational groups is provided in Section 5 of CSN Explained.

In 2018 it is estimated that there will be around 97,750 construction employees working in the region, which is around 3% higher when compared to 2013 levels. The construction output growth in the region (2.4%) is higher than that of the UK as a whole (2.2%) but annual average employment growth is much weaker (0.6% vs. 1.2%). Part of the explanation for this is the North East being one of the regions in which output fell more strongly than employment from its pre-recessionary peak (31% vs. 13%) suggesting that there is significant excess capacity in the market at present.

There tends to be a greater prevalence of self-employment/labour-only sub-contract workers in the south of the country, whereas in the north there tends to be more direct employment in traditional family-run businesses. According to the 2012 Workforce Mobility and Skills survey from CITB, 66% of construction employees are directly employed in the North East, compared with just 38% in Greater London and 30% in the South East. Employment protection and workforce loyalty are likely to lead to a lower level of job shedding among direct employees than the self-employed and labour-only sub-contract workforce.

In 2012, the largest construction trade occupation in the region was plumbing and HVAC trades, which accounted for 8% of the total workforce. This is a different profile than the UK average, where wood trades and interior fit-out is the biggest trade occupation.

The majority of occupations are forecast to see employment rise over the five year period to 2018, with civil engineering operatives nec* likely to

Total employment by occupation – North East

	Actual	Estimate	Forecast	
	2012	2013	2014	2018
Senior, executive and business process managers	5,010	4,480	4,590	5,020
Construction project managers	1,570	1,590	1,600	1,630
Other construction process managers	6,360	6,290	6,330	6,470
Non-construction professional, technical, IT and other office-based staff	11,150	9,960	10,030	10,390
Construction trades supervisors	4,360	4,640	4,540	4,200
Wood trades and interior fit-out	7,070	7,150	7,410	7,870
Bricklayers	2,590	2,690	2,690	2,720
Building envelope specialists	1,990	1,800	1,840	1,950
Painters and decorators	2,650	2,370	2,360	2,370
Plasterers	2,550	2,490	2,400	2,190
Roofers	1,970	2,130	2,100	2,010
Floorers	2,490	2,720	2,530	2,290
Glaziers	760	680	690	770
Specialist building operatives nec*	4,180	3,740	3,820	4,100
Scaffolders	1,340	1,200	1,080	1,180
Plant operatives	2,810	2,510	2,540	2,660
Plant mechanics/fitters	2,690	2,410	2,530	3,080
Steel erectors/structural fabrication	1,320	1,180	1,170	1,120
Labourers nec*	6,290	5,620	5,520	5,200
Electrical trades and installation	6,860	7,440	7,340	7,160
Plumbing and HVAC Trades	7,640	7,720	7,760	7,720
Logistics	440	400	390	380
Civil engineering operatives nec*	1,280	1,400	1,480	1,950
Non-construction operatives	420	370	360	310
Civil engineers	1,490	1,630	1,670	1,850
Other construction professionals and technical staff	8,260	8,840	8,950	9,350
Architects	370	330	330	350
Surveyors	1,220	1,330	1,360	1,460
Total (SIC 41-43)	85,790	82,980	83,100	84,740
Total (SIC 41-43, 71.1, 74.9)	97,130	95,110	95,410	97,750

Source: ONS, CSN, Experian. Ref. CSN Explained, Section 3, Notes 5 and 6

*Not elsewhere classified

experience the greatest annual average increase of 6.8%. Plant mechanics/fitters are also expected to see strong rises of 5% per year. However, it should be noted that the construction workforce in the North East is relatively small, particularly at the occupational category level; therefore significant changes in percentages can be experienced with a relatively small movement in actual numbers.

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, due to the inconsistency and coverage of supply data, these flows do not include movements into the industry from training. Therefore, the ARR 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 28 occupations within the North East's construction industry is illustrated in the table. The figure of 2,680 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.

In absolute terms the largest requirement is for non-construction professional, technical, IT, and other office-based staff, equivalent to 24% of the region's total ARR. However, as a proportion of base 2014 employment, wood trades and interior fit-out occupations are likely to be most in demand (7%). The region's ARR of 2,680 is equivalent to 2.8% of base 2014 employment, higher than the UK average (1.5%).

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 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 – North East

	2014-2018
Senior, executive and business process managers	190
Construction project managers	50
Other construction process managers	-
Non-construction professional, technical, IT and other office-based staff	640
Construction trades supervisors	110
Wood trades and interior fit-out	520
Bricklayers	70
Building envelope specialists	<50
Painters and decorators	<50
Plasterers	-
Roofers	70
Floorers	50
Glaziers	<50
Specialist building operatives nec*	250
Scaffolders	50
Plant operatives	<50
Plant mechanics/fitters	100
Steel erectors/structural fabrication	60
Labourers nec*	60
Electrical trades and installation	<50
Plumbing and HVAC Trades	170
Logistics	-
Civil engineering operatives nec*	60
Non-construction operatives	<50
Civil engineers	50
Other construction professionals and technical staff	<50
Architects	-
Surveyors	-
Total (SIC 41-43)	2,590
Total (SIC 41-43, 71.1, 74.9)	2,680

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

4 Comparisons across the UK

The strongest growth in construction output is expected in the South West and Wales, as both will benefit from new nuclear build projects during the forecast period. Even though main construction works at Wylfa, Wales, are not due to start until mid-2017 at the earliest, this is a very large project in a relatively small market, making its impact on overall construction output similar to Hinkley Point in the South West, despite the latter starting three years earlier.

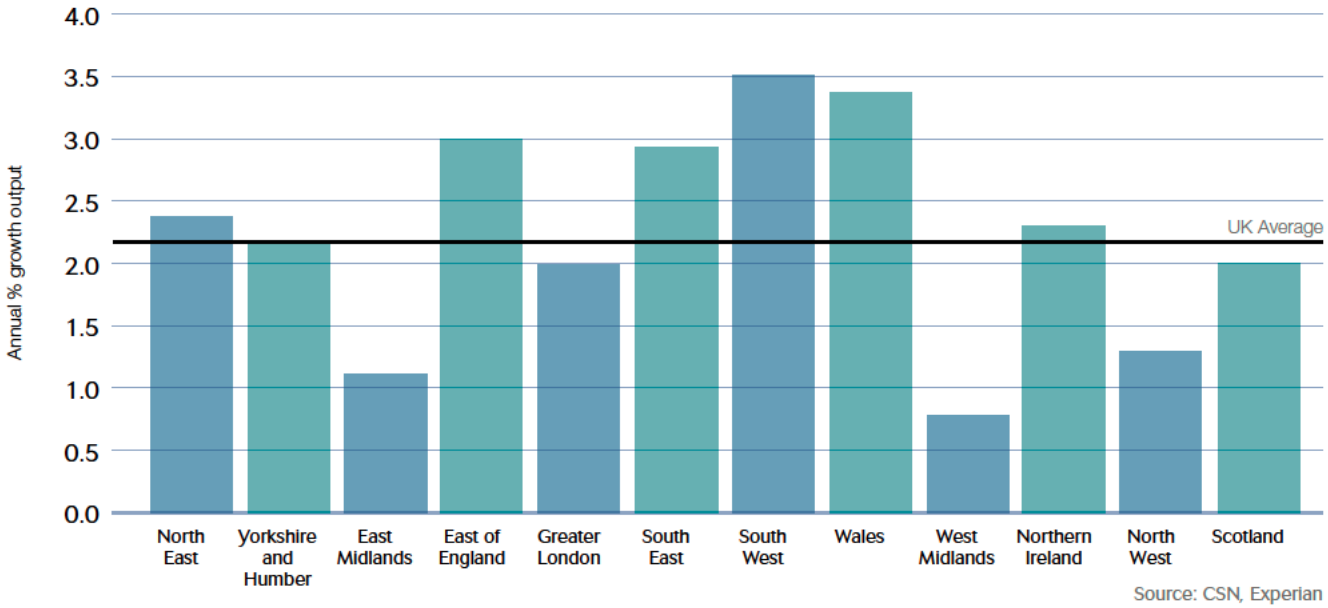
Once the South West and Wales are stripped away, the south east corner of England is again due to do rather better than the rest of the UK. The South East benefits disproportionally from growth in the private housing sector which takes a larger share of output in the region than the UK average (18% vs. 14%). This combined with a higher than average growth rate (5.7% vs. 4.6%) helps boost overall expansion in the South East's construction sector (with an annual average growth of 2.9% to 2018). The East of England has a slightly stronger average growth rate of 3% a year. The main reasons for the region's higher than average increase in construction output are good growth in private housing, combined with higher than average infrastructure expansion when work starts on the site of the Sizewell C new nuclear project at the beginning of 2018. In addition, strong growth in industrial construction is linked to the development of distribution and logistics facilities around London Gateway Port.

Interestingly however, Greater London's projected annual average output growth rate of 2% is slightly below the UK average (2.2%). Greater London is the only region to have experienced expansion in construction output in real terms over the five years to 2012, therefore activity in some sectors may be close to peaking. For example, infrastructure activity is projected to decline by an annual average of 2.4% in the five years to 2018, as projects such as Crossrail and Thameslink wind down in the second half of the forecast period.

Despite the South West and Wales being the strongest areas in output terms, they do not top the employment rankings. Infrastructure work has a smaller labour requirement than other sectors and so impacts employment much less than output. The East of England has the strongest employment growth rate, of 2% a year on average over the forecast period. This is due to two factors – a strong output growth rate and the region's higher than average share of the much more labour intensive R&M sectors compared with the UK as whole (45% vs. 36%). All regions are expected to see employment growth except the West Midlands, where output growth of just 0.8% a year on average is not enough to drive expansion of employment given anticipated productivity gains.

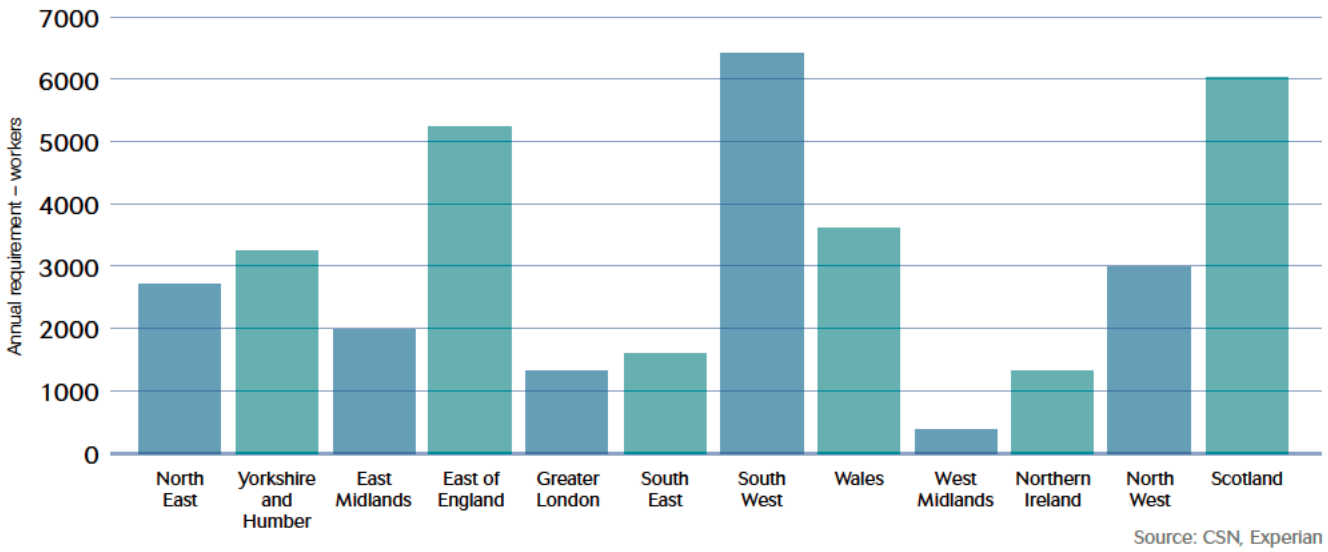
Concerns about prospective skills shortages have been increasing in some quarters recently, which may initially seem surprising given the industry's position in the recovery cycle. Construction output in 2013 is likely still to be 15% below its 2007 peak, and employment is likely to be 13% down on its 2008 peak. This would suggest that a substantial pool of construction workers is waiting to re-enter the industry. However, many of these workers may have taken jobs in other sectors, or retired. Questions remain about the number of workers who will come back into the industry as growth continues and, of these, how many will have been out of the industry for such a length of time that they will require some level of retraining.

Annual average output growth by region 2014-2018

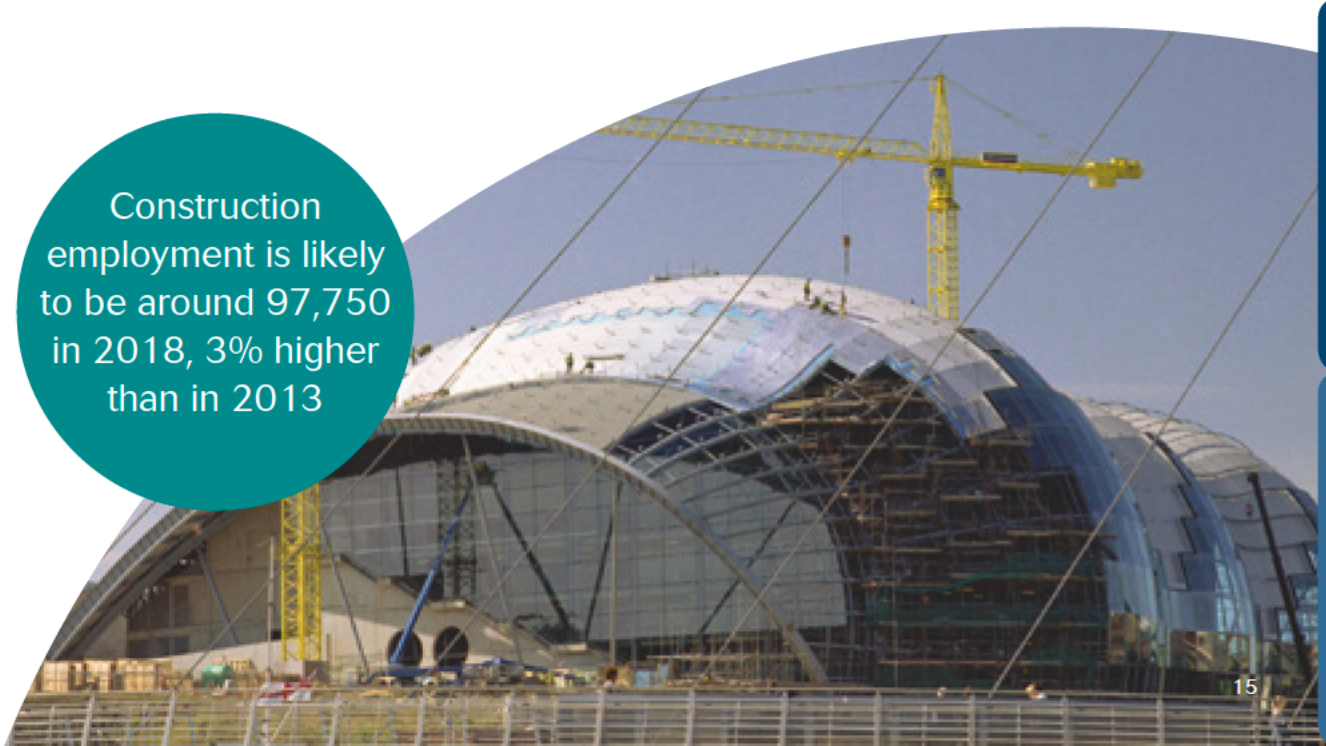


Source: CSN, Experian
ref. CSN Explained, Section 3, Note 2

Annual recruitment requirement (ARR) by region 2014-2018



Source: CSN, Experian



Construction employment is likely to be around 97,750 in 2018, 3% higher than in 2013

CSN Explained

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

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

Section 2 provides a glossary to clarify some of the terms that are used in the reports.

Section 3 has some further notes relating to the data sources used for the various charts and tables. This section also outlines what is meant by the term 'footprint', when talking about the areas of responsibility that lie with a Sector Skills Council.

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

Section 5 gives a detailed breakdown of the 28 occupational groups into the individual standard occupational classification (SOC) codes that are aggregated to provide the employment and recruitment requirement.

Section 6 concludes this appendix by giving details about the range of LMI reports, the advantages of being a CSN member and details of who to contact if readers are interested in joining.

1 CSN methodology

Background

The **Construction Skills Network** has been evolving since its conception in 2005, acting as vehicle for ConstructionSkills to collect and produce information on the future employment and training needs of the industry. CITB, CIC and CITB-ConstructionSkills Northern Ireland are working as ConstructionSkills, the Sector Skills Council for Construction, to produce robust labour market intelligence which provides 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 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 twice a year and consist of key regional stakeholders invited from industry, Government, education and other SSCs, all of whom contribute their local industry knowledge and views on training, skills, recruitment, qualifications and policy. The National Group also includes representatives from industry, Government, education and other SSCs. This Group convenes twice a year and sets the national scene, effectively forming a backdrop for the Observatories.

At the heart of the CSN are several 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, which is comprised of statisticians and modelling experts.

The models have evolved over time and will continue to do so, to ensure that they account for new research as it is published as well as new and improved modelling techniques. Future changes to the model will only be made after consultation with the Technical Reference Group.

The model approach

The model approach relies on a combination of primary research and views from the CSN to facilitate it. National data is used as the basis for the assumptions that augment the models, which are then adjusted with the assistance of the Observatories and National Group. Each English region, Wales, Scotland and Northern Ireland has a separate model (although all models are interrelated 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 CITB 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.

Estimates of demand are based upon the results of discussion groups comprising industry experts, a view of construction output and 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 use a set of specific statistics for each major type of work to determine the employment, by trade, needed to produce the predicted levels of construction output. The labour supply for each type of trade or profession is based upon the previous year's supply (the total stock of employment) combined with flows into and out of the labour market.

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

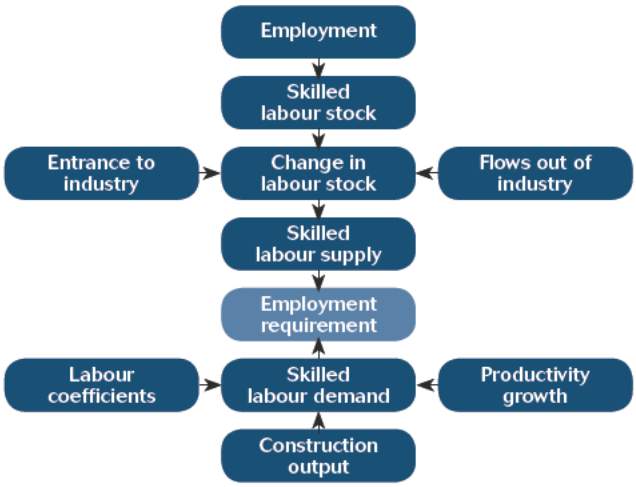
- Transfers to other industries
- International/domestic OUT migration
- Permanent retirements (including permanent sickness)
- Outflow to temporary sickness and home duties.

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

Flows into the labour market include:

- Transfers from other industries
- International/domestic immigration
- Inflow from temporary sickness and home duties.

The most significant inflow is likely to be from other industries. A summary of the model is shown in the flow chart.



2 Glossary of terms

Building envelope specialists – any trade involved with the external cladding of a building other than bricklaying, e.g. curtain walling.

Demand – this 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 Employer Skills Survey, produced by the Department for Education and Skills. These data sets are translated into labour requirements by trade using a series of coefficients to produce figures for labour demand that relate to forecast output levels.

GDP (gross domestic product) – total market value of all final goods and services produced. A measure of national income. GDP = GVA plus taxes on products minus subsidies on products.

GVA (gross value added) – total output minus the value of inputs used in the production process. GVA measures the contribution of the economy as a difference between gross output and intermediate outputs.

Coefficients – to generate the labour demand, the model makes use of a set of specific statistics for each major type of work, to determine employment by trade or profession, based upon the previous year's supply. In essence, this is the number of workers of each occupation or trade needed 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. Information is collected from around 53,000 households each quarter (the sample totals more than 100,000 people).

LMI (labour market intelligence) – data that is quantitative (numerical) or qualitative (insights and perceptions) on workers, employers, wages, conditions of work, etc.

Macroeconomics – the study of an economy at 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) – organisation producing official statistics on the economy, population and society at both a national 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 United Kingdom Standard Industrial Classification of Economic Activities produced by the ONS.

SOC codes (Standard Occupational Classification codes) – from the United Kingdom Standard Occupational Classification produced by the ONS.

Supply – the total stock of employment in a period of time, plus the flows into and out of the labour market. Supply is usually calculated from LFS data.

3 Notes and footprints

Notes

1 Except for Northern Ireland, output data for the English regions, Scotland and Wales is 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 prices to a 2005 constant price basis, so that 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 over the forecast period.

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

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

5 Employment numbers are rounded to the nearest 10.

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

7 A reporting minimum of 50 is used for the annual recruitment requirement (ARR). As a result some region and devolved nation ARR forecasts do not sum to the total UK requirement.

8 The Employment and ARR tables show separate totals for SIC 41-43 and SIC 41-43, 71.1 and 74.9. The total for SIC 41-43 covers the first 24 occupational groups on the relevant tables and excludes civil engineers, other construction professionals and technical staff, architects and surveyors. The total for SIC 41-43, 71.1 and 74.9 includes all occupations.

Footprints for Built Environment SSCs

ConstructionSkills is responsible for SIC 41 Construction of buildings, SIC 42 Civil engineering, SIC 43 Specialised construction activities and SIC 71.1 Architectural and engineering activities and related technical consultancy.

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

The sector footprints for the other SSCs covering the Built Environment

SummitSkills

Footprint – plumbing, heating, ventilation, air conditioning, refrigeration and electrotechnical.

Coverage – Building services engineering.

ConstructionSkills shares an interest with SummitSkills in SIC 43.21 Electrical installation and SIC 43.22 Plumbing, heat and air-conditioning installation. ConstructionSkills recognises the responsibility of SummitSkills across Standard Industrial Classifications (SIC) 43.21 and 43.22; 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 71.1 Architectural and engineering activities and related technical consultancy.

Energy and Utility Skills

Footprint – electricity, gas (including gas installers), water and waste management.

Coverage – electricity generation and distribution, gas transmission, distribution and appliance installation and maintenance, water collection, purification and distribution, waste water collection and processing, waste management.

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

AssetSkills has a peripheral interest in SIC 71.1

4 Definitions: types and examples of construction work

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

Housing schemes, care homes for the elderly and the provision within housing sites of roads and services for gas, water, electricity, sewage and drainage.

Private sector housing

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

Infrastructure – public and private

Water

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

Sewerage

Sewage disposal works, laying of sewers and surface drains.

Electricity

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

Gas, communications, air transport

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

Railways

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

Harbours

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

Roads

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

Public non-residential construction[1]

Factories and warehouses

Publicly owned factories, warehouses, skill centres.

Oil, steel, coal

Now restricted to remedial works for public sector residual bodies.

Schools, colleges, universities

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

Health

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

Offices

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

Entertainment

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

Garages

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

Shops

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

Agriculture

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

Miscellaneous

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

Private industrial work

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

Private commercial work[1]

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.[2]

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.[3]

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'.
2 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.
3 Except where stated, mixed development schemes are classified to whichever sector provides the largest share of finance.

5 Occupational groups

Occupational group Description, SOC (2010) reference.	
Senior, executive, and business process managers	
Chief executives and senior officials	1115
Financial managers and directors	1131
Marketing and sales directors	1132
Purchasing managers and directors	1133
Human resource managers and directors	1135
Property, housing and estate managers	1251
Information technology and telecommunications directors	1136
Research and development managers	2150
Managers and directors in storage and warehousing	1162
Managers and proprietors in other services nec*	1259
Functional managers and directors nec*	1139
IT specialist managers	2133
IT project and programme managers	2134
Financial accounts managers	3538
Sales accounts and business development managers	3545
Construction project managers	
Construction project managers and related professionals	2436
Other construction process managers	
Production managers and directors in manufacturing	1121
Production managers and directors in construction	1122
Managers and directors in transport and distribution	1161
Waste disposal and environmental services managers	1255
Health and safety officers	3567
Conservation and environmental associate professionals	3550
Non-construction professional, technical, IT, and other office-based staff (excl. managers)	
IT operations technicians	3131
IT user support technicians	3132
Finance and investment analysts and 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 standards and regulations	3565
Programmers and software development professionals	2136
Information technology and telecommunications professionals nec*	2139
Estate agents and auctioneers	3544
Solicitors	2413
Legal professionals nec*	2419
Chartered and certified accountants	2421
Business and financial project management professionals	2424
Management consultants and business analysts	2423
Receptionists	4216
Typists and related keyboard occupations	4217
Business sales executives	3542
Book-keepers, payroll managers and wages clerks	4122
Records clerks and assistants	4131
Stock control clerks and assistants	4133
Telephonists	7213
Communication operators	7214
Personal assistants and other secretaries	4215
Sales and retail assistants	7111
Telephone salespersons	7113
Buyers and procurement officers	3541
Human resources and industrial relations officers	3562
Credit controllers	4121
Company secretaries	4214
Sales related occupations nec*	7129
Call and contact centre occupations	7211
Customer service occupations nec*	7219
Elementary administration occupations nec*	9219
Chemical scientists	2111
Biological scientists and biochemists	2112
Physical scientists	2113
Laboratory technicians	3111
Graphic designers	3421
Environmental health professionals	2463
IT business analysts, architects and systems designers	2135
Conservation professionals	2141
Environment professionals	2142
Actuaries, economists and statisticians	2425
Business and related research professionals	2426
Finance officers	4124
Financial administrative occupations nec*	4129
Human resources administrative occupations	4138
Sales administrators	4151
Other administrative occupations nec*	4159
Office supervisors	4162

*Not elsewhere classified

Sales supervisors	7130
Customer service managers and supervisors	7220
Office managers	4161

Construction trades supervisors

Skilled metal, electrical and electronic trades supervisors	5250
Construction and building trades supervisors	5330

Wood trades and interior fit-out

Carpenters and joiners	5315
Paper and wood machine operatives	8121
Furniture makers and other craft woodworkers	5442
Construction and building trades nec* (25%)	5319

Bricklayers

Bricklayers and masons	5312

Building envelope specialists

Construction and building trades nec* (50%)	5319

Painters and decorators

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

Plasterers

Plasterers	5321

Roofers

Roofers, roof tilers and slaters	5313

Floorers

Floorers and wall tilers	5322

Glaziers

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

Specialist building operatives nec*

Construction operatives nec* (100%)	8149
Construction and building trades nec* (5%)	5319
Industrial cleaning process occupations	9132
Other skilled trades nec*	5449

Scaffolders

Scaffolders, stagers and riggers	8141

Plant operatives

Crane drivers	8221
Plant and machine operatives nec*	8129
Fork-lift truck drivers	8222
Mobile machine drivers and operatives nec*	8229

Plant mechanics/fitters

Metal working production and maintenance fitters	5223
Precision instrument makers and repairers	5224
Vehicle technicians, mechanics and electricians	5231
Elementary process plant occupations nec*	9139
Tool makers, tool fitters and markers-out	5222
Vehicle body builders and repairers	5232

Steel erectors/structural fabrication

Steel erectors	5311
Welding trades	5215
Metal plate workers and riveters	5214
Construction and building trades nec* (5%)	5319
Smiths and forge workers	5211
Metal machining setters and setter-operators	5221

Labourers nec*

Elementary construction occupations (100%)	9120

Electrical trades and installation

Electricians and electrical fitters	5241
Electrical and electronic trades nec*	5249
Telecommunications engineers	5242

Plumbing and heating, ventilation and air conditioning trades

Plumbers and heating and ventilating engineers	5314
Pipe fitters	5216
Construction and building trades nec* (5%)	5319
Air-conditioning and refrigeration engineers	5225

Logistics

Large goods vehicle drivers	8211
Van drivers	8212
Elementary storage occupations	9260
Buyers and purchasing officers (50%)	3541
Transport and distribution clerks and assistants	4134

Civil engineering operatives nec*

Road construction operatives	8142
Rail construction and maintenance operatives	8143
Quarry workers and related operatives	8123

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 (vehicles and metal goods)	8132
Routine inspectors and testers	8133
Assemblers and routine operatives nec*	8139
Elementary security occupations nec*	9249
Cleaners and domestics	9233
Street cleaners	9232
Gardeners and landscape gardeners	5113
Caretakers	6232
Security guards and related occupations	9241
Protective service associate professionals nec*	3319

Civil engineers

Civil engineers	2121

*Not elsewhere classified

Other construction professionals and technical staff

Mechanical engineers	2122
Electrical engineers	2123
Design and development engineers	2126
Production and process engineers	2127
Quality control and planning engineers	2461
Engineering professionals nec*	2129
Electrical and electronics technicians	3112
Engineering technicians	3113
Building and civil engineering technicians	3114
Science, engineering and production technicians nec*	3119
Architectural and town planning technicians	3121
Draughtspersons	3122
Quality assurance technicians	3115
Town planning officers	2432
Electronics engineers	2124
Chartered architectural technologists	2435
Estimators, valuers and assessors	3531
Planning, process and production technicians	3116

Architects

Architects	2431

Surveyors

Quantity surveyors	2433
Chartered surveyors	2434

*Not elsewhere classified

6 CSN website and contact details

The CSN website

citb.co.uk/research/construction-skills-network

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

The main UK report, along with the twelve LMI reports (one for Northern Ireland, Scotland, Wales and each of the nine English regions) can be downloaded from the site, while other CITB research reports are also freely available on the CITB website. Having access to this range of labour market intelligence and trend insight allows industry, Government, regional agencies and key stakeholders to:

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

The website also contains 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 CITB research
- Details for those interested in becoming members of the network.

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 that play a vital role in feeding back observations, knowledge and insight into 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 issues
- 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 contact with the CITB research team CSN members can:

- Access observatory-related material such as meeting dates, agendas, presentations and notes
- Access additional research material
- Comment/feedback on the CSN process.

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 becoming a member of the CSN, please contact us at: **csn@citb.co.uk**

For more information about the Construction Skills Network, contact:
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