Construction Skills Network

North East 2013-2017

Labour Market Intelligence

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

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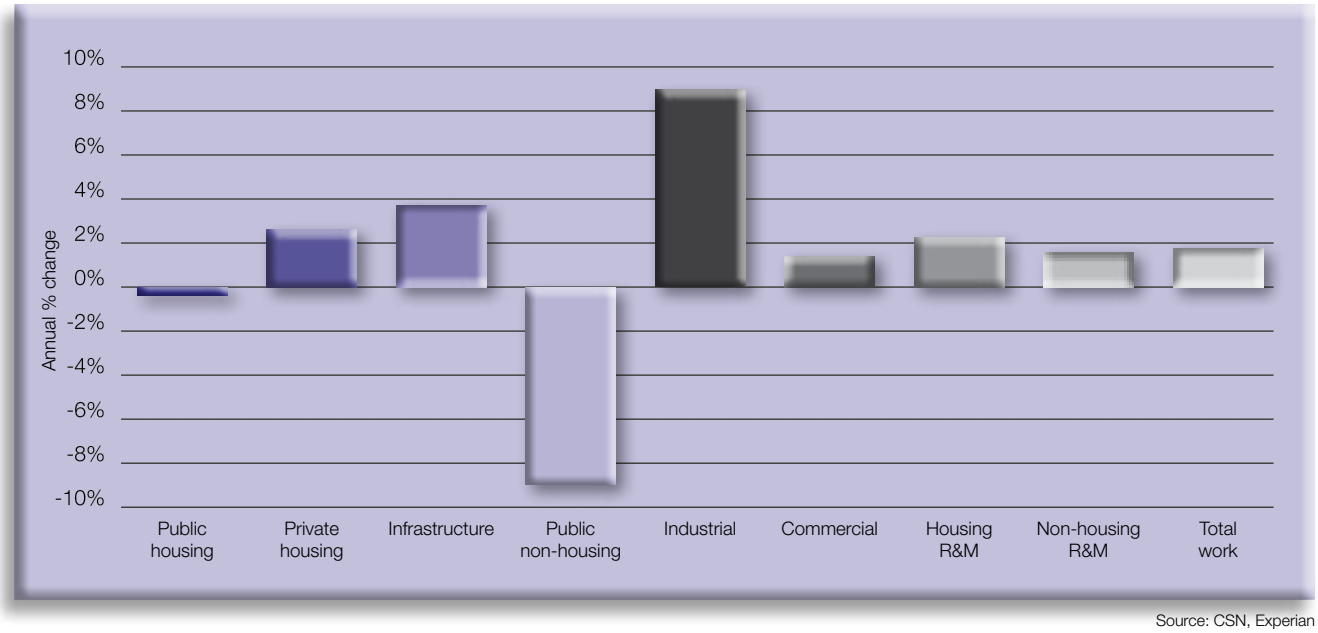
1. Summary – North East

The North East is predicted to see a modest rise in construction activity over the forecast period with an average annual output growth rate of 1.7%, performing better than the UK as a whole, where annual average growth of 0.8% is projected. Construction employment is estimated to be 76,140 in 2017, 6% lower than in 2013. The North East accounts for 2.4% of the total UK annual recruitment requirement (ARR) and it represents 0.9% of total projected base 2013 employment in the region, slightly lower than the UK figure of 1.2%.

Annual average construction output growth 2013-2017 – North East



Source: CSN, Experian
ref. CSN Explained, Section 4, Note 2

The North East is predicted to see a modest rise in construction output, with average annual growth of 1.7%

Key findings

The public non-housing and public housing sectors are the only ones projected to see falls in annual average output over the five years to 2017. The region was allocated £217m under the 2008-2011 Affordable Homes Programme (AHP) to construct a total of 5,626 homes. During the 2011-2015 period lower levels of funding worth £181m will be made available for the North East and Yorkshire and Humber combined where is anticipated that approximately 8,100 new affordable homes will be built in the two regions.

The public non-housing sector benefitted heavily from the early stages of the Building Schools for Future (BSF) programme. Since the scheme has been scrapped there has been a lack of projects coming through into the sector resulting in heavy declines being forecast.

In contrast the industrial construction sector is forecast to experience the greatest annual average growth of 8.9% over the next five years. However by the end of 2017 output in the sector will still be 14.7% below the most recent peak levels seen in 2007.

The infrastructure sector is projected to see a rise of 3.8% per year on average over the period to 2017. More activity will be seen over the short term with projects such as the 300MW biomass plant by MGT Power Ltd and Tyne Renewable Energy Plant contributing to the majority of this growth. In the Autumn Statement 2012 it was announced that £64m of funding would go towards the A1 upgrade works at Lobby Hill. Output in the sector could reach new a new high by 2017.

Although annual average output growth of 1.7% is estimated for the North East, employment is expected to fall by 2% each year on average over the forecast period, with almost all this fall taking place in the first two years.

Employment is projected to fall in the majority of occupations over the five year period to 2017 with plant operatives experiencing the greatest annual average decline of 5.7%. In contrast, surveyors are predicted to see the largest annual average rise of 4.4%.

The latest mobility report from CITB-ConstructionSkills shows that 85% of the construction workforce in the North East originated there, which is substantially higher than the UK average of 65.8%. The second biggest contribution to the region's construction workforce was from Yorkshire and Humber at 10.7%.

The region's ARR at 690 represents 0.9% of total projected base 2013 employment, slightly lower than in the UK as a whole (1.2%). The largest absolute requirement is for construction managers (90), but as a share of 2013 base employment, at 6%, plasterers and dry liners will be the most sought after.

Regional comparisons 2013-2017

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

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

2. The outlook for construction in the North East

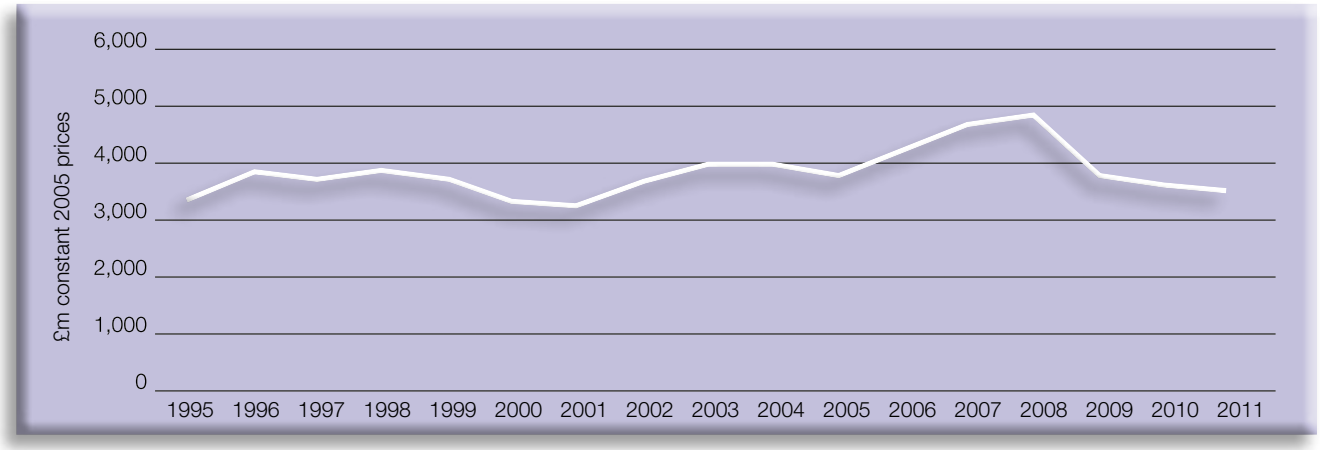
2.1 Construction output in the North East – overview

Construction output in the North East in 2011 fell by 4% to £3.4bn. The new work sector saw a decrease of 2% to £2.5bn whilst the repair and maintenance (R&M) sector experienced a much bigger drop of 8% to £910m.

Public expenditure cutbacks have led to the public non-housing (-22%) and public housing (-16%) sectors seeing the greatest falls in the new work market. The North East benefitted heavily from the early stages of the Building Schools for the Future programme and with the lack of other sizeable projects coming through, the fall in output experienced in 2011 comes as no surprise. Under the current 2011-2015 AHP the funding for the North East and Yorkshire and Humber have been combined with a total allocation of £181m, which is a large reduction when compared to the previous 2008-2011 AHP for the region.

The infrastructure sector was the only one to see growth, of 86%, to £378m, however this strong rise is due the sector coming back from a low base.

Construction output 1995-2011 – North East



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

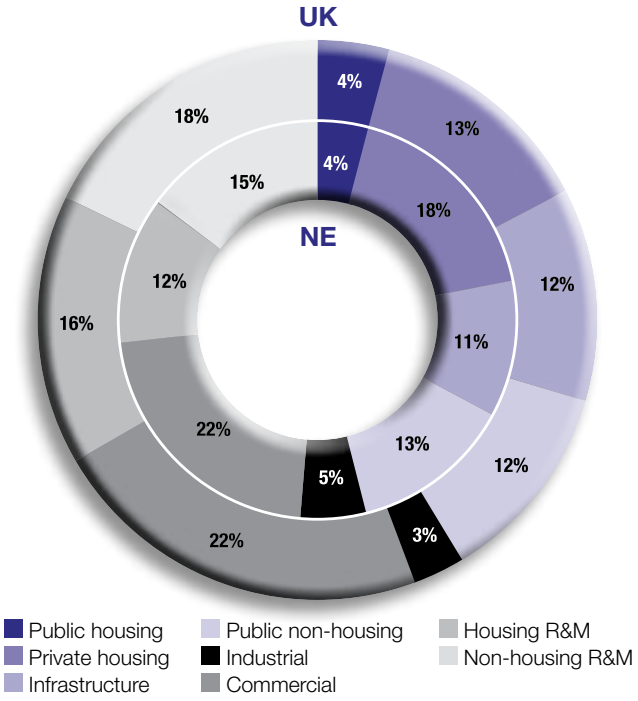
2.2 Industry structure

The diagram, construction industry structure 2011 – UK vs. North East, illustrates the sector breakdown of construction in the North East compared to that in the UK. Effectively, the percentages illustrate what proportion of total output each sector accounts for. It should be noted that as the Regional Office for National Statistics (ONS) has revised its economic sector disaggregation since 2011, data on industry structure in previous Labour Market Intelligence reports is not directly comparable with data in this one.

The new work sector in the North East is significantly larger than in the UK as a whole, taking a 73% share of total output in the region compared with a national figure of 66%.

The private housing sector accounted for 18% of construction output in the North East in 2011, compared with only 13% in the UK as a whole, whilst the industrial sector in the region was also larger at 5% vs. the national average of 3%. Conversely, the housing R&M sector was smaller, taking a 12% share of activity compared with a 16% share of the UK. Non-housing R&M (15%) in the region was also below that of the UK (18%).

Construction industry structure 2011 – UK vs. North East



Source: ONS, Experian

2.3 Economic overview

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

2.4 Economic structure

In 2011 Gross Value Added (GVA) in the North East stood at £40bn in 2009 prices, a 1% decline on the previous year. As a share of the UK, the North East accounted for 3% of GVA in 2011.

Public service accounted for the lion's share of the North East's GVA at 26% and was one of the few sectors to see growth in 2011 at 0.2%, while professional and other private services came in second at 19%. The manufacturing sector was the next largest and it experienced a small decline of 0.5% in 2011. The wholesale and retail and information and communication sectors ranked fourth and fifth largest in the region, seeing similar falls of 2.1% and 2.4% respectively.

The largest decrease in GVA was seen in the agriculture, forestry and fishing (6.8%) sector whilst the strongest growth was seen in the transport and storage (3.4%) sector. However the former sector only accounted for 1% of total output whilst the corresponding share for the latter was 4%.

Economic structure – North East (£ billion, 2009 prices)

Selected sectors	Actual	Forecast *Annual % change, real terms*					
	2011	2012	2013	2014	2015	2016	2017
Public services	10.3	0.9	-0.2	0.3	0.5	0.7	1.0
Professional and other Private Services	7.5	1.7	0.8	1.5	2.1	2.3	2.3
Manufacturing	6.1	-0.7	1.5	2.0	1.6	1.1	0.9
Wholesale and Retail	3.9	0.4	0.8	1.7	2.3	2.5	2.5
Information and Comumunication	1.9	3.1	0.7	1.8	2.5	2.9	2.8
Total Gross Value Added (GVA)	**40.0**	**-0.4**	**0.4**	**1.3**	**1.8**	**1.9**	**2.0**

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

2.5 Forward looking economic indicators

GVA in the North East is projected to grow at an annual average rate of 1.5% over the five years to 2017, slower than the UK average of 1.9%. The highest annual average growth rate over the forecast period will be seen in the information and communication (2.2%) sector, the fifth largest one, with only moderate growth expected in most of the other main economic sectors in the region.

Public services, the biggest sector, is estimated to see lacklustre annual average growth of 0.5%. Professional and other private services, the second largest sector, is likely to see higher average GVA growth of 1.8% a year. The third major sector, manufacturing, is predicted to see annual average growth of 1.4% whilst for the fourth main sector, wholesale and retail, the corresponding figure is 1.9%.

High levels of inflation and weak wage growth led to the region's real household disposable income (RHDI) falling by 2.9% in 2011. As inflation eases RHDI growth should begin to pick up slowly over the next couple of years, eventually reaching 2% in 2017. With this increase, household spending also sees an upward trend over the forecast period.

In 2011, unemployment reached nearly 140,000 in the North East, equivalent to an unemployment rate of 10.9% and significantly higher than the UK figure of 8.1%. The region's unemployment level is expected to have risen in 2012 with further increases projected in 2013. However, as the UK economy begins to see more of a sustained recovery, unemployment begins to decline from 2014 onwards.

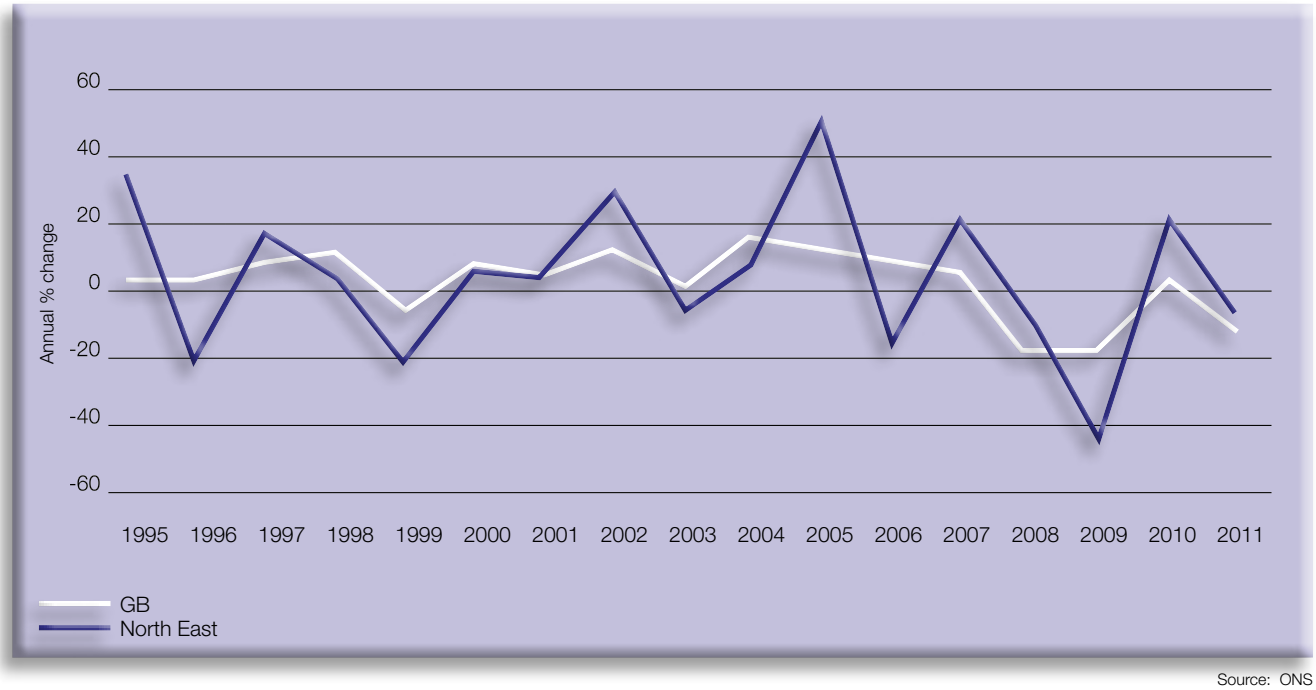
The working age population stood at 1.6m in 2011 and is predicted to rise as a share of total population over the forecast period. House prices are estimated to stabilise in 2014 with small growth thereafter.

Economic indicators – North East (£ billion, 2009 prices – unless otherwise stated)

	Actual	Forecast *Annual % change, real terms*					
	2011	2012	2013	2014	2015	2016	2017
Real household disposable income	33	1.2	0.7	1.3	1.4	1.5	2.0
Household spending	32	0.0	0.4	1.5	1.9	2.0	1.9
Working age population (000s and as % of all)	1,614	61.6%	61.9%	62.2%	62.4%	62.6%	62.7%
House prices (£)	138,979	-0.5	-0.6	0.2	0.9	1.1	1.4
LFS unemployment (millions)	0.14	2.26	2.55	-6.80	-7.04	-4.89	-6.69

Source: ONS, DCLG, Experian

New construction orders growth 1995-2011 – 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 by 8% in 2011 to £1.7bn and orders are now 44% below peak 2007 levels. It is likely that a framework agreement for sewerage treatment works led to a significant rise in infrastructure orders of 210% to £567m in 2011. Orders also went up for the industrial (37%) and commercial (1%) sectors, to £144m and £425m respectively. As expected public housing orders fell sharply by 90% to £16m whilst private housing orders also struggled, dropping by 66% to £192m. The public non-housing sector saw the smallest fall in orders of 16% to £333m.

2.7 New construction orders – current situation

The first half of last year saw new work orders for the region increase by 42% to £880m when compared to the same period in 2011. New private housing orders jumped by 193%, year-on-year, whilst the industrial (67%) and commercial (54%) sectors also saw a marked rise. In contrast, infrastructure new orders halved and public housing orders fell by 12% over the same period.

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

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

Output in the first half of 2012 stood at £1.8bn in current prices in the North East, 9% below the corresponding period of 2011. Whilst the R&M sector saw a heavy decline of 21% to £480m, the new work one experienced a lesser fall of 3% to £1.3bn. On the new work side the public housing (£22m) and public non-housing (£208m) sectors saw decreases in output of 75% and 18% respectively. The largest increase in output was seen in the infrastructure sector where growth of 78% to £296m was seen. It is thought that this upward movement may be due to works on large projects such as new £100m energy to waste plant in Billingham and the £100m improvements in Tyne and Wear to public transport. Both projects were due to

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

	Actual 2011	Annual % change 2007	2008	2009	2010	2011
Public housing	16	77.4	-27.5	-25.3	150.4	-89.7
Private housing	192	36.2	-53.1	-49.9	178.9	-66.0
Infrastructure	567	-11.4	-47.1	0.6	114.1	209.9
Public non-housing	333	20.3	101.9	-15.0	-39.2	-16.5
Industrial	144	-18.2	-20.0	-62.8	-9.4	37.0
Commercial	425	35.3	-4.0	-63.0	7.0	0.9
Total new work	**1,677**	**21.0**	**-9.9**	**-44.3**	**20.6**	**-8.1**

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

have commenced in the first half of 2011. Growth for the infrastructure sector is smaller at 7% when comparing the first six months of last year with the last six months of 2011.

Over the next two years construction output in the North East is anticipated to grow by an annual average of 1.1%. The new work sector is projected to see annual average increases of 1% whilst the R&M one is forecast to perform slightly better with 1.5% growth a year on average.

The public non-housing sector is predicted to be the worst performing one with a decline of 19.8% expected per year on average over the 2013-2014 period. Government cut backs have led to a lack of sizeable projects coming through and output for the sector has been decreasing since it peaked in 2010.

Despite public expenditure cuts, relatively smaller annual average falls of 2.5% are estimated for the public housing sector in 2013 and 2014. The sector is estimated to have contracted by around 64% by end 2012 from its peak in 2010, therefore any further decline this year is projected to be relatively modest.

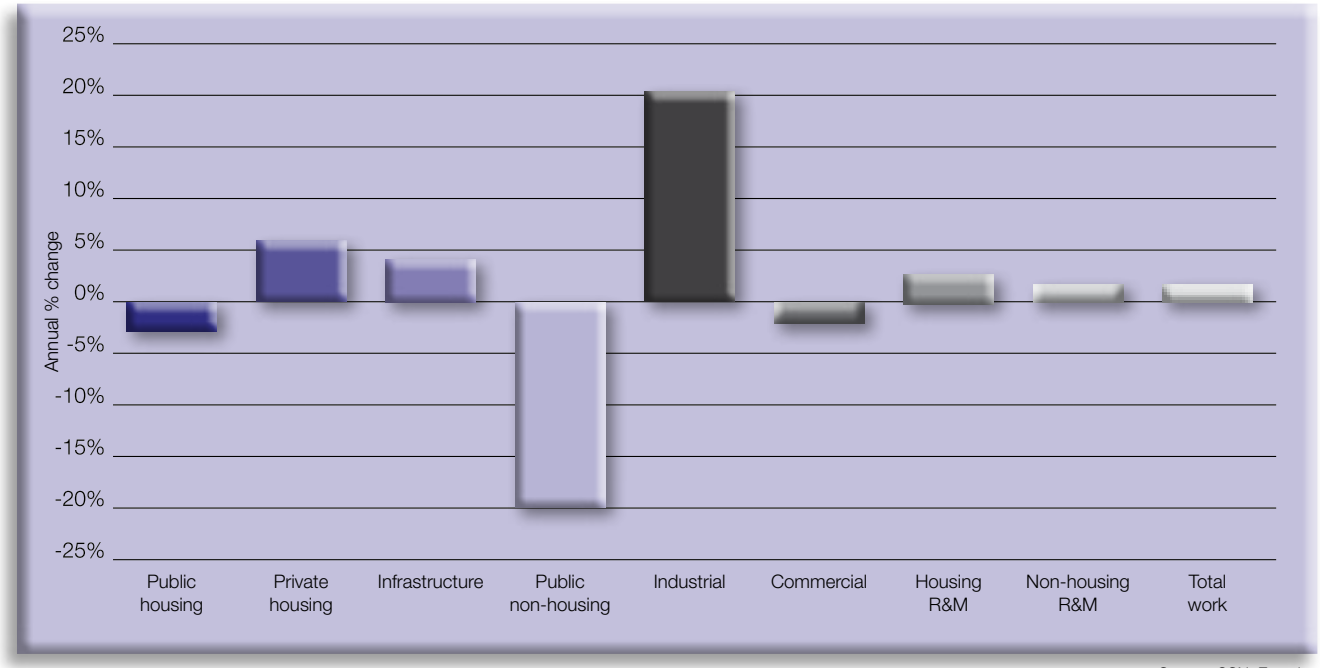
The commercial sector is projected to contract in the two years to 2014 by an annual average of 1.6%. It remains difficult in the present climate for developers to judge when to bring new space onto the market. An ongoing project in the region is the Manor Walks shopping centre, worth £200m. Planning permission was granted for the scheme in 2011 and work began in May of last year. The scheme incorporates a Vue cinema, improved parking, restaurants and cafes. By Christmas 2012 the construction of the cinema was scheduled to be complete with fit out work due to finish in May this year.

Industrial output is forecast to see the highest level of growth over the next two years as an average increase of 20.1% is predicted. There are two projects contributing towards the majority of this growth. The first scheme is the £125m expansion of Nissan's Sunderland plant to build a new hatchback model, with an offer of £8m from the regional growth fund. Production for the new model is expected to commence in 2014. The second development is AkzoNobel's new £100m manufacturing plant in Ashington where work started in June of last year. Works incorporate cutting edge manufacturing technology in order to treble the firm's North East manufacturing capability. It is hoped the site will become the new home for the business' UK Decorative Paints operation. The plant is due to become operational in late 2014 when the company plans to shut down its current site in Prudhoe.

The private housing sector is estimated to see average rises of 5.7% per year between 2013 and 2014. Despite this increase, output for the sector will be 40% below peak levels experienced in 2007. Mortgage approvals and loans remain low and the lack of confidence in the wider economy is constraining new project starts.

A moderate annual average growth rate (4.2%) is expected for the infrastructure sector over the short term. Two new plants able to generate enough electricity to power 600,000 homes are thought to have begun at the end of last year. MGT Power Ltd is to construct two 300MW biomass plants named the Tees Renewable Energy Plant (Tees REP) and the Tyne Renewable Energy Plant (Tyne REP). It is thought the Tees REP will cost £400m whilst the Tyne REP will see investment of more than £500m.

Annual average construction output growth 2013-2014 – North East



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

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

	Actual	Forecast annual % change			Annual average
	2011	2012	2013	2014	2013-14
Public housing	127	-57%	-7%	2%	-2.5%
Private housing	621	-21%	3%	8%	5.7%
Infrastructure	378	16%	5%	3%	4.2%
Public non-housing	456	-20%	-25%	-15%	-19.8%
Industrial	184	33%	29%	12%	20.1%
Commercial	754	-2%	-2%	-1%	-1.6%
New work	2,520	-7%	0%	2%	1.0%
Housing R&M	409	-20%	2%	3%	2.4%
Non-housing R&M	502	-7%	0%	2%	0.9%
Total R&M	**910**	**-13%**	**1%**	**2%**	**1.5%**
Total work	**3,431**	**-9%**	**0%**	**2%**	**1.1%**

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

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

The North East's construction industry is projected to see annual average output growth of 1.7% over the next five years. Again, as is the case in the short term, the R&M sector (1.8%) in the period to 2017 is predicted to perform slightly better than the new work one (1.6%).

Activity in the public non-housing sector is expected to continue to fall to 2016 giving an annual average decline of 9.0%. The North East benefitted from five schemes totalling 60 schools in Wave 1 to 3 of the BSF programme worth approximately £390m. Three out of the five schemes were projected to complete in 2012 hence the sharp fall in output we are currently experiencing and will continue to see for some time. By the end of 2017, the outturn for the sector is expected to be around 60% lower when compared to peak levels seen in 2010.

The public housing sector is anticipated to see only a marginal fall of 0.1% on average per year over the next five years. The North East was allocated a total of £217m under the previous 2008-2011 AHP, compared with the £181m funding available for the region and Yorkshire and Humber combined over the period to 2015. During the current AHP it is thought that approximately 8,100 new affordable homes will be constructed in the two regions compared with the 5,626 homes built for the North East under the former programme. However, we believe that most of the fall in output caused by the funding cuts has already been seen and by 2014 output should begin to rise again as social housing providers become more adept at sourcing finance from other sources.

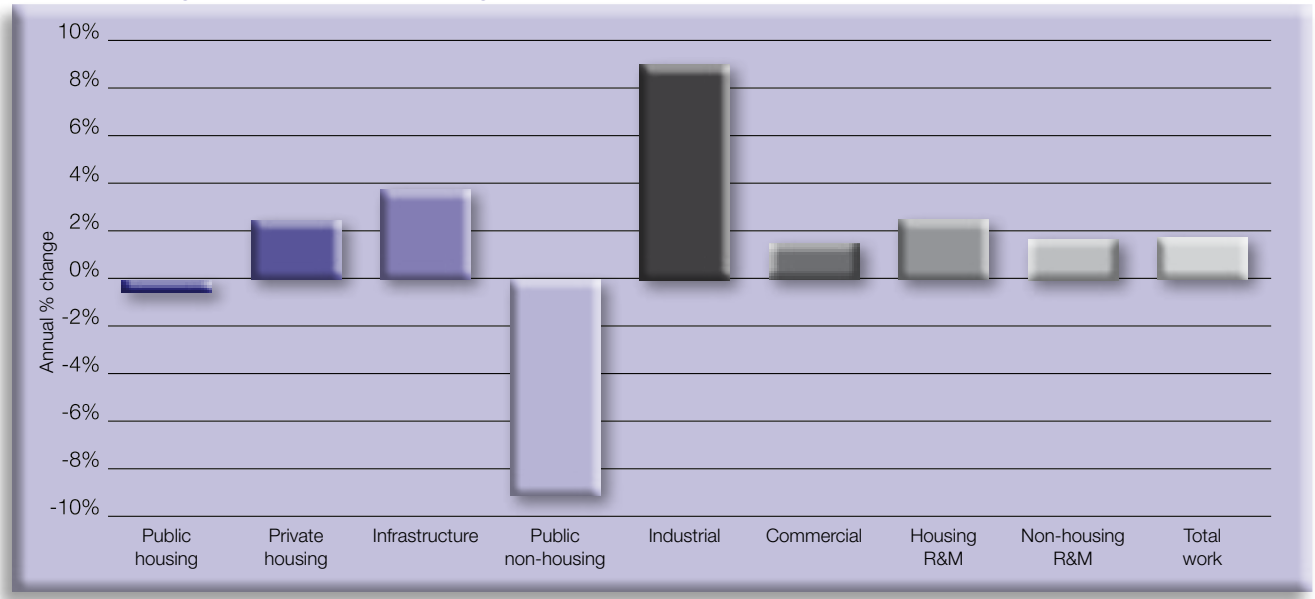
Output in the industrial sector is forecast to experience the greatest annual average growth of 8.9% over the next five years. The sector is boosted by work on Nissan's and AkzoNobel's projects in the short term. Over the longer term as the economy recovers and confidence increases we expect to see some demand for new manufacturing and distribution facilities.

The infrastructure sector is predicted to see a rise of 3.8% per year on average between 2013 and 2017. In the Autumn Statement 2012 it was announced that £64m of funding would go towards work on the A1 upgrade works at Lobby Hill, Tyneside, where the existing dual carriageway will be transformed into a three lane road. Output could reach a new high in the sector by 2017.

A modest annual average growth rate of 2.5% over the period to 2017 is expected for the private housing sector. As part of the Gateshead regeneration scheme, Galliford Try's consortium is to build 2,400 homes which will consist of both affordable and private housing. The £347m project should have started in 2012 but activity will be spread over a 15-year period. The first three sites are due to see 318 homes, of which 55 are affordable tenures.

The industrial sector is forecast to show the highest average level of growth, 8.9% over the next five years

Annual average construction output growth 2013-2017 – North East



Source: CSN, Experian

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

	Estimate	Forecast annual % change					Annual average
	2012	2013	2014	2015	2016	2017	2013-17
Public housing	55	-7%	2%	3%	1%	1%	-0.1%
Private housing	490	3%	8%	2%	0%	0%	2.5%
Infrastructure	440	5%	3%	3%	2%	6%	3.8%
Public non-housing	364	-25%	-15%	-2%	-1%	0%	-9.0%
Industrial	245	29%	12%	5%	2%	0%	8.9%
Commercial	742	-2%	-1%	2%	4%	4%	1.3%
New work	2,335	0%	2%	2%	2%	2%	1.6%
Housing R&M	326	2%	3%	2%	2%	1%	2.1%
Non-housing R&M	467	0%	2%	3%	2%	1%	1.5%
R&M	**793**	**1%**	**2%**	**2%**	**2%**	**1%**	**1.8%**
Total work	**3,128**	**0%**	**2%**	**2%**	**2%**	**2%**	**1.7%**

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

2.10 Beyond 2017

Tenders are due to be invited by the Teesside Trust for a new £300m hospital at Wynyard Business Park in Hartlepool. It is hoped the hospital will be financed through pension fund loans, the first of its kind in the UK. The project is due to commence in 2015 with completion in 2019.

However by far the biggest project currently proposed for the North East is the new nuclear power station at Hartlepool. Initially the project was included in our forecasts last year as one of the eight nuclear sites earmarked for work. However more recent analysis by the Nuclear Industry Association shows that work at Hartlepool is likely to start around the mid-2020s.

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 2011, the forecast total employment in 26 occupations and in the industry as a whole between 2013 and 2017. A full breakdown of occupational groups is provided in Section 5 of CSN Explained.

During the forecast period output in the region will see an annual average rise of 1.7%, however employment will decline by an average of 2% a year. Over the 2007 to 2012 period output in the North East is estimated to have declined by 32% but employment only fell by 17% over the same timeframe, creating an output/employment 'gap' of 15%. This indicates that there could be a significant level of underemployment in the region i.e. excess capacity present where employees are working less than their full hours as firms try to hold onto key workers.

There tends to be something of a north/south divide regarding the structure of employment in the construction industry, with more direct employment in traditional family-run businesses in the north of the country and a greater prevalence of self-employment/labour only sub-contract (LOSC) workforce in the south. According to the latest *Workforce Mobility and Skills in the UK Construction Sector 2012* report commissioned by CITB-ConstructionSkills, the North East directly employed 66% of its workforce, the highest proportion of all English regions and devolved nations.

Thus it could be the case that there is a tendency for firms in the south to shed staff more quickly in a downturn – it is easier in practical terms and no redundancy payments need to be made to a self-employed/LOSC workforce. It is therefore likely that the levels of underemployment are higher in the north than the south as staff will probably be retained for longer in the former. In addition to this, long-term loyalty seems to have made firms who directly employ their staff more reluctant to shed them.

As a result the implied high level of excess capacity in the North East is exacerbating the normal lag that would be expected from the time when output starts to rise again and employment follows suit. While output starts to rise again in 2014, employment is projected to continue to

Total employment by occupation – North East

	Actual 2011	Forecast 2013	Forecast 2017
Senior, executive, and business process managers	2,510	2,720	2,800
Construction managers	5,510	5,640	5,640
Non-construction professional, technical, IT, and other office-based staff	9,730	9,390	8,660
Wood trades and interior fit-out	9,260	8,530	8,040
Bricklayers	3,180	2,630	2,190
Building envelope specialists	2,150	1,880	1,710
Painters and decorators	4,490	4,300	4,030
Plasterers and dry liners	920	1,050	1,190
Roofers	3,330	2,830	2,410
Floorers	1,640	1,440	1,290
Glaziers	1,520	1,450	1,380
Specialist building operatives nec*	2,320	2,080	1,860
Scaffolders	1,050	1,020	990
Plant operatives	1,700	1,360	1,120
Plant mechanics/fitters	2,950	2,750	2,510
Steel erectors/structural	1,310	1,160	1,020
Labourers nec*	4,640	4,110	3,690
Electrical trades and installation	4,960	4,450	3,920
Plumbing and HVAC Trades	6,480	5,770	5,210
Logistics	1,790	1,880	1,790
Civil engineering operatives nec*	2,670	2,810	2,830
Non–construction operatives	2,800	2,420	2,010
Civil engineers	690	680	690
Other construction professionals and technical staff	6,810	7,000	7,060
Architects	450	480	570
Surveyors	1,030	1,310	1,530
Total (SIC 41-43)	**76,910**	**71,670**	**66,290**
Total (SIC 41-43, 71.1, 74.9)	**85,890**	**81,140**	**76,140**

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

decline until 2015 before stabilising in the final two years of the forecast period.

In 2011, the largest construction-specific occupation in the region was wood trades and interior fit-out, which accounted for 11% of the total workforce, followed by plumbing and HVAC trades and other construction professionals and technical staff both with an 8% share.

The majority of the occupations are forecast to see employment fall over the five year period to 2017 with plant operatives experiencing the greatest annual average decline of 5.7%. Surveyors are predicted to see the largest annual average employment rise of 4.4% over the same timeframe.

3.2 Annual recruitment requirements (ARR) by occupation

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

The ARR for the 26 occupations within the North East's construction industry is illustrated in the table. The figure of 690 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 accounts for 2.4% of total UK annual recruitment requirement (ARR) and it is 0.9% of total projected base 2013 employment, slightly lower than in the UK as a whole (1.2%).

The largest absolute requirement is for construction managers (90), but as a share of 2013 base employment, at 6%, plasterers and dry liners will be the most sought after. However even this requirement is small with an average of 60 employees needed per year between 2013 and 2017.

The latest mobility report from CITB-ConstructionSkills provides some good indications of geographic flows for the construction industry. According to the survey, 85% of the construction workforce in the North East originated there, which is substantially higher than the UK figure of 65.8%. The second biggest contribution to the region's construction workforce was from Yorkshire and Humber at 10.7%.

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 – North East

	2013-2017
Senior, executive, and business process managers	<50
Construction managers	90
Non-construction professional, technical, IT, and other office-based staff	-
Wood trades and interior fit-out	<50
Bricklayers	<50
Building envelope specialists	-
Painters and decorators	-
Plasterers and dry liners	60
Roofers	-
Floorers	<50
Glaziers	<50
Specialist building operatives nec*	<50
Scaffolders	<50
Plant operatives	<50
Plant mechanics/fitters	-
Steel erectors/structural	-
Labourers nec*	60
Electrical trades and installation	-
Plumbing and HVAC Trades	-
Logistics	80
Civil engineering operatives nec*	70
Non-construction operatives	-
Civil engineers	<50
Other construction professionals and technical staff	-
Architects	<50
Surveyors	50
Total (SIC 41-43)	**620**
Total (SIC 41-43, 71.1, 74.9)	**690**

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

4. Comparisons across the UK

Interestingly, the profile of output growth at regional and devolved nation level over the 2013-17 period is not as south-east centric as we might have expected, with Wales forecast to have the strongest average annual growth. However, Wales' growth is almost entirely due to the new nuclear power station planned at Wylfa in Anglesey, with average annual growth of just 0.6% if the project is removed from the forecast period. Although Hitachi's technology, the Advanced Boiling Water Reactor (ABWR) will need to go through a generic design assessment, construction is still expected to start during the current forecast period.

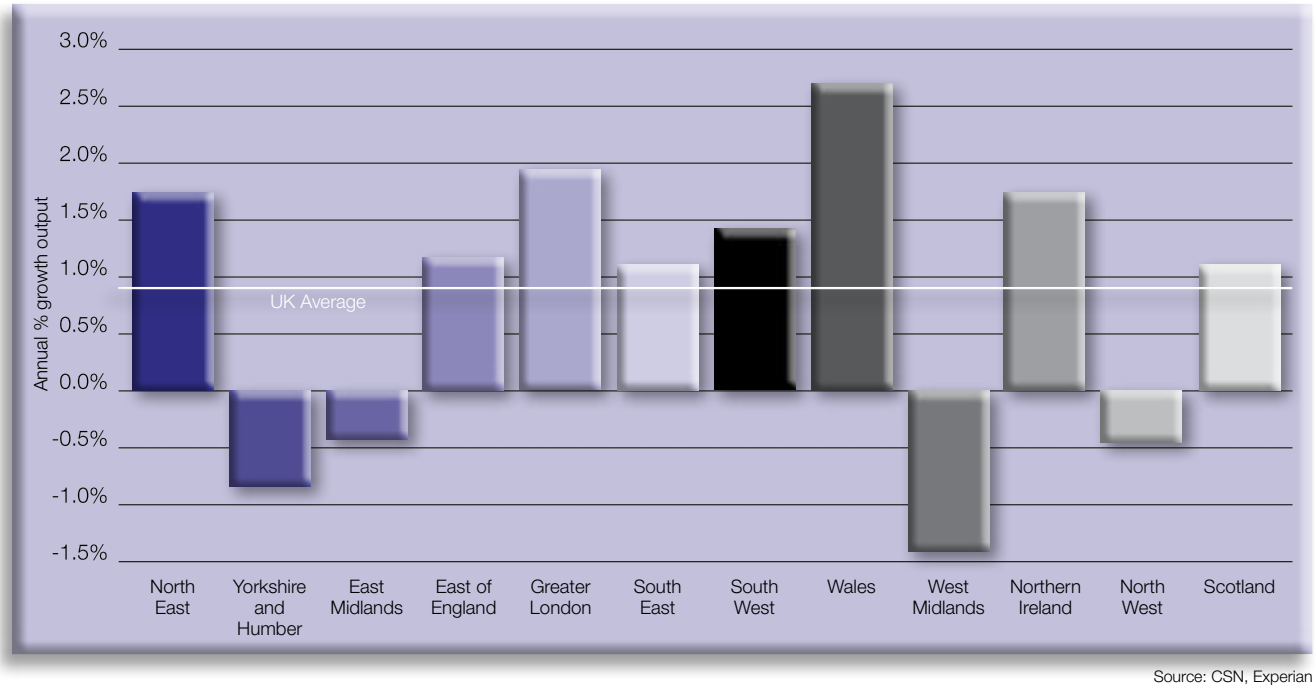
The North East is coming back up from a very low base – the region saw the worst fall of all the English regions between 2007 and 2012, with output declining by 30% over the period – hence the relatively stronger outlook for the region over the forecast period. In comparison, Scotland's decline over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

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

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

Employment is estimated to be 76,140 in 2017, 6% lower than in 2013

Annual average output growth by region 2013-2017



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

Annual recruitment requirement (ARR) by region 2013-2017

Source: CSN, Experian

CSN Explained

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

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

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

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

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

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

1. CSN Methodology

Background

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

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

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

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

The model approach

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

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

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

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

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

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

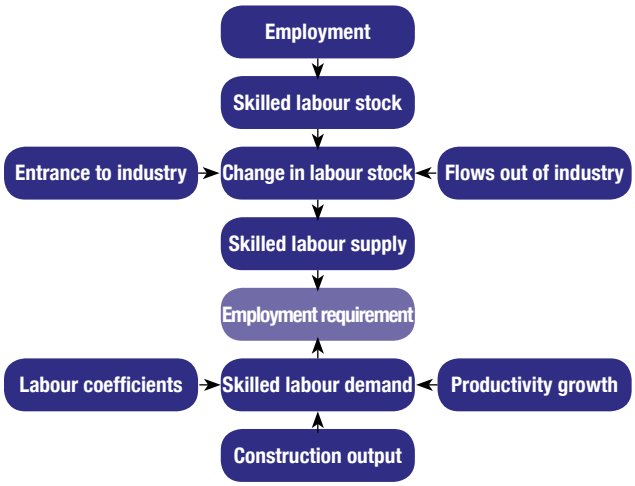
The main reason for outflow is likely to be transfer to other industries.

Flows into the labour market include:

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

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

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



2. Glossary of Terms

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

3. Notes and Footprints

Notes

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

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

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

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

5 Employment numbers are rounded to the nearest 10.

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

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

Footprints for Built Environment SSCs

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

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

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

SummitSkills

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

Coverage – Building Services Engineering.

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

AssetSkills

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

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

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

Energy and Utility Skills

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

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

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

* AssetSkills has a peripheral interest in SIC 71.1

4. Definitions: types and examples of construction work

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

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

Private sector housing

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

Infrastructure – public and private

Water

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

Sewerage

Sewage disposal works, laying of sewers and surface drains.

Electricity

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

Gas, communications, air transport

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

Railways

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

Harbours

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

Roads

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

Public non-residential construction[1]

Factories and warehouses

Publicly owned factories, warehouses, skill centres.

Oil, steel, coal

Now restricted to remedial works for public sector residual bodies.

Schools, colleges, universities

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

Health

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

Offices

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

Entertainment

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

Garages

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

Shops

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

Agriculture

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

Miscellaneous

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

Private industrial work

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

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

Private commercial work[2]

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

Health
Private hospitals, nursing homes, clinics.

Offices
Office buildings, banks.

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

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

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

Agriculture
All buildings and work on farms, horticultural establishments.

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

New work

New housing
Construction of new houses, flats, bungalows only.

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

Repair and maintenance

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

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

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

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

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

5. Occupational Groups

Occupational group
Description, SOC (2000) reference.

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

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

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

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

Bricklayers
Bricklayers, masons, 5312

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

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

Plasterers and dry liners
Plasterers, 5321

Roofers
Roofers, roof tilers and slaters, 5313

Floorers
Floorers and wall tilers, 5322

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

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

Scaffolders
Scaffolders, stagers, riggers, 8141

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

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

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

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

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

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

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

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

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

Civil engineers
Civil engineers, 2121

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

Architects
Architects, 2431

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

* not elsewhere classified

6. CSN website and contact details

The CSN website – www.cskills.org/csn

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

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

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

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

The website also contains further information about:

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

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

CSN members area

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

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

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

CSN members therefore have:

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

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

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

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

Contact details

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

For more information about the Construction Skills Network, contact:

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