2012–2016 Construction Skills Network East Midlands

LABOUR MARKET INTELLIGENCE

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Contents

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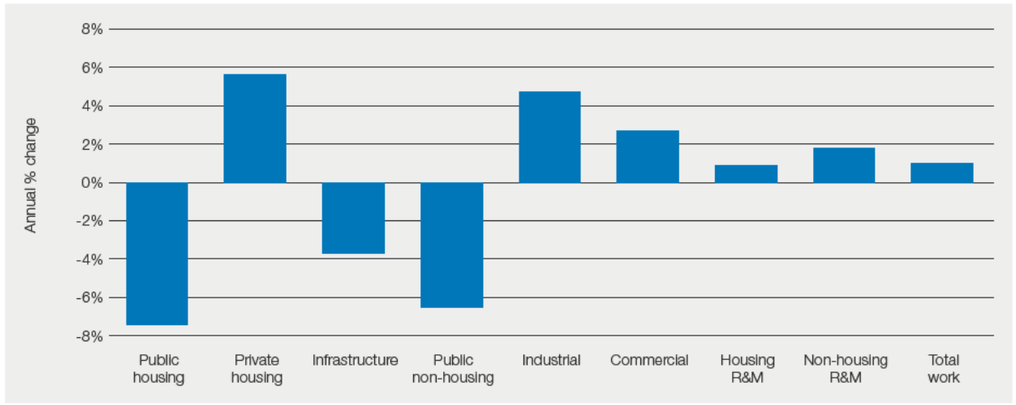
1. Summary – East Midlands

The East Midlands is forecast to see construction output rise at an average rate of 1% per year over the five years to 2016, putting it towards the bottom of the growth table for the regions and devolved nations. It is weaker than the UK figure of 1.4%. New work output is expected to increase by 0.8% per year on average, compared with 1.3% for the repair and maintenance (R&M) sector. Total construction employment in the region is expected to rise by 2.6% from 2012's projected level to around 152,770 in 2016. However, this is still 17% lower than 2006's peak.

Annual average construction output growth 2012-2016 - East Midlands



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

David Lock Associates Ltd

Total construction employment in the region is expected to rise by 2.6% from 2012's projected level to around 152,770 in 2016.

Key findings

Private housing is expected to fare well over the forecast period, as improving conditions in the wider economy stimulate demand. However, despite the strong growth forecast in each year of the 2012-2016 period, output is expected to be only 59% of its 2006 peak in 2016, reflecting the size of the output falls during the recession. The strengthening conditions in the macro economy are also likely to lead to a recovery in demand for office and leisure facilities. The extension of the Victoria Shopping Centre in Nottingham is expected to start during the forecast period.

Although work is due to start imminently on the Nottingham Express Transit (NET) Line 2 project and last for around four years, infrastructure output in the region will decline in each year to 2016. The East Midlands infrastructure sector has seen strong growth in recent years, partly due to the M1 improvement scheme, and there is little else, apart form the NET project, to replace this.

The public expenditure cuts will impact on the public housing and public non-housing sectors, which are both expected to see output decline, on average, in each year of the forecast period. The number of affordable housing starts in the East Midlands has fallen by 97% in the six months to September 2011, compared with the corresponding period of 2010, and this will inevitably impact on output in the sector.

Funding levels for affordable housing across England have been almost halved for the 2011-2015 Affordable Housing Programme, compared with the 2008-11 period and thus there is unlikely to be any substantial growth in the sector over the forecast period. Nevertheless, this compares to a record level of output in the sector in 2010.

The East Midlands did not benefit from the early waves of the Building Schools for the Future (BSF) programme as much as some other regions, and thus output in the sector is expected to fall at a weaker rate than the national average over the 2012-2016 period.

Construction employment in the East Midlands is expected to continue to decline over the next couple of years, and only return to growth in 2015. Overall it is forecast to decline by 0.2% per year on average over the 2012-2016 period, compared to average growth of 0.6% for the UK as a whole. The largest increases in absolute terms in construction-specific employment are expected for surveyors (660), logistics personnel (250) and painters and decorators (230). In terms of percentage of base 2012 employment, logistics personnel (24%) are expected to be the most in demand.

The ARR for the East Midlands of 3,460 is equivalent to 2.3% of base 2012 employment in the region.

Regional comparison 2012-2016

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

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

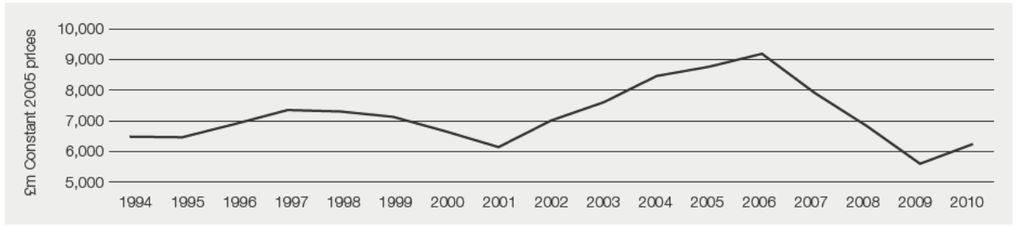
2. The outlook for construction in the East Midlands

2.1 Construction output in the East Midlands – overview

Construction output in the East Midlands rose by 12% in 2010, to total £6.2bn, in 2005 prices. This followed three years of double-digit declines. This growth was largely due to a substantial increase in new work output, which rose by 21%, whilst output in the repair and maintenance (R&M) sector fell by 5%.

Output rose across all the new work sectors, with growth strongest in the public housing sector where output rose to its highest level since at least 1990, the earliest year in our deflated regional data series. There was also marked growth in the industrial (34%), public non-housing (28%) and private housing (27%) sectors.

Construction output 1994-2010 - East Midlands



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

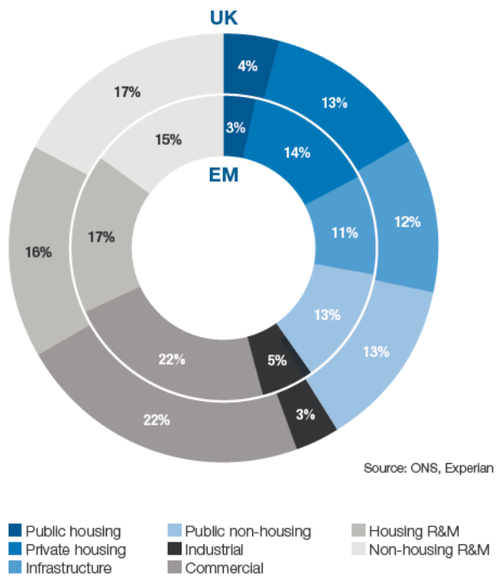
2.2 Industry structure

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

The structure of the East Midlands construction sector is very similar to that of the UK as a whole, although there are some small differences. The region's industrial construction sector takes a 5% share of output, slightly larger than the UK figure of 3%. The housing sectors, both public and private, together account for 17% of construction output on a regional basis and nationally, but the private housing sector in the East Midlands accounts for 14%, whilst the figure is 13% for the UK as a whole.

The R&M sectors in the East Midlands accounted for 32% of output in 2010, compared with a national figure of 33%. Within this, non-housing R&M was slightly more important than in the UK as a whole while the housing R&M sector was slightly less so.

Construction industry structure 2010 - UK vs. East MIdlands



Source: ONS, Experian

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

Selected sectors	Actual	Forecast Annual % change, real terms					
	2010	2011	2012	2013	2014	2015	2016
Public services	17	0.5	-0.8	-0.4	-0.2	0.2	0.4
Financial and business services	13	2.3	1.6	2.4	2.8	3.2	3.3
Transport and communications	5	2.2	1.2	2.1	2.3	2.5	2.5
Manufacturing	12	2.6	2.4	3.0	2.3	1.7	1.2
Distribution, hotels and catering	12	2.2	1.2	2.1	2.3	2.5	2.5
Total Gross Value Added (GVA)	**75**	**1.2**	**0.6**	**1.6**	**1.8**	**2.0**	**2.0**

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

2.3 Economic overview

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

2.4 Economic structure

In 2010, the East Midlands accounted for 6.2% of the UK's Gross Value Added (GVA) but 7.2% of its population, indicating that GVA per head is below the national average.

GVA in the East Midlands totalled £75bn, in 2006 prices, in 2010, an increase of 2.6% on the previous year. This was much stronger growth than in the UK, where GVA rose by just 1.8%. The distribution, hotels and catering and financial and business services sectors fared well, growing by 3.2% and 3.1%, respectively, during the year.

The relative importance of the manufacturing sector in the East Midlands has been declining over the past 10 years, falling from 21.6% in 2000 to just 16.5% in 2010. Output in the sector fell markedly in 2008 and 2009, before returning to growth in 2010, rising by 2.4%.

Following 2010's return to growth, GVA in the East Midlands is expected to have risen by 1.2% in 2011, stronger than the UK average (0.6%).

2.5 Forward looking economic indicators

GVA in the East Midlands is expected to increase in each year of the forecast period, rising at an average rate of 1.6%. This is slightly weaker than the 1.8% forecast in 2010 for 2011-2105. It is also below the UK average for the 2012-2016 period, where GVA is forecast to grow by 1.8% per year.

Growth is expected to be strongest in the financial and business services sector (2.7% per year), with output forecast to rise at an average rate of 2.1% in both the manufacturing sector and transport and communication. In contrast, the public services sector is forecast to see output decline marginally (-0.2%) per year over the 2012-2016 period.

Real household disposable incomes are expected to have fallen by 2.8% in 2011, a second successive year of decline. Given this, it is not surprising that consumer spending has come under pressure, as households have cut back substantially on discretionary spending. Inflation is expected to moderate over the next 12 months and this should provide some boost to consumer spending, but consumers will remain under pressure from weak income growth and rising unemployment during 2012 and thus it will not be until 2013 that there are improvements in expenditure.

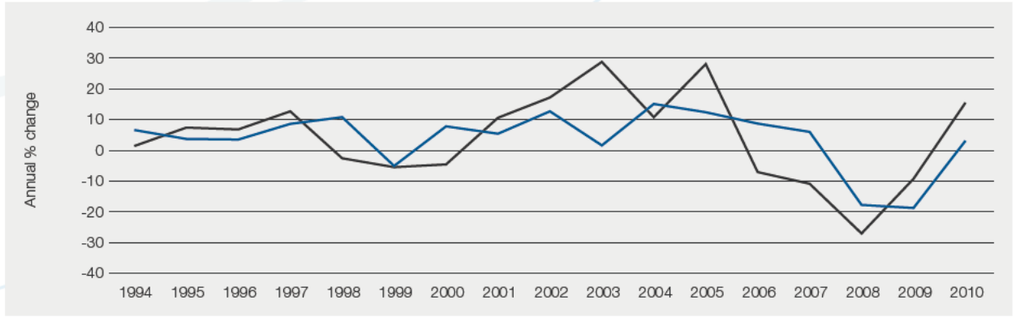
Following two years of decline, house prices in the East Midlands rose by 6.2% in 2010 to an average of £161,204, according to the Department of Communities and Local Government (CLG). They are expected to have declined again in 2011, by almost 2%, but they are forecast to rise in each year of the 2012-2016 period.

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

	Actual	Forecast Annual % change, real terms					
	2010	2011	2012	2013	2014	2015	2016
Real household disposable income	58	-2.8	-0.1	1.5	1.6	2.2	2.4
Household spending	56	-1.6	-0.1	1.7	2.0	2.3	2.6
Working age population (000s and as % of all)	2708.7	60.2	60.2	60.8	61.4	61.8	62.2
House prices (£)	161204	-1.8	0.9	2.8	3.2	3.1	3.2
LFS unemployment (millions)	0.18	6.6	6.8	-5.7	-6.1	-6.2	-8.5

Source: ONS, DCLG, Experian

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



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

2.6 New construction orders – overview

After declining for four consecutive years, construction orders in the East Midlands rose by 15.5% in 2010 to total £3.7bn in current prices.

On a sectoral basis, new orders rose at the strongest rate in the private housing sector where they more than doubled to £771m after reaching a record low in 2009. Despite this substantial increase, new orders were still only 46% of their 2006 peak, highlighting the scale of their decline during the recession.

Infrastructure new orders also increased markedly, rising by 52% to reach a new record high of £984m. In contrast, the public non-housing (22%), public housing (19%) and industrial (19%) sectors all saw double-digit declines.

2.7 New construction orders – current situation

In the six months to June 2011, new construction orders in the East Midlands fell by 29% from the corresponding period of 2010. Orders totalled £1.48bn and were also 7% lower than in the second half of 2010.

The industrial sector saw the strongest rise in new orders in the first half of 2011, as they almost doubled to £161m. The outturn of £128m in the second quarter was the highest since the beginning of 2008. Rather surprisingly, public non-housing new orders rose by 29%, year-on-year, in the first half of the year, although there are a number of Building Schools for the Future (BSF) projects still going on in the region.

New construction orders in the infrastructure sector saw the strongest decline, falling by 70% on an annual basis, although this was compared to a record outturn in the six months to June 2010.

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

	Actual	Annual % change				
	2010	2006	2007	2008	2009	2010
Public housing	132	76.0	-16.7	-18.9	5.5	-19.4
Private housing	771	22.0	-9.2	-58.5	-41.5	108.9
Infrastructure	984	-44.3	114.3	-16.8	56.2	52.4
Public non-housing	751	-22.4	3.7	23.6	12.9	-22.2
Industrial	210	-26.1	5.0	-46.1	-29.1	-19.4
Commercial	811	-9.8	-37.2	-11.7	-28.6	6.1
Total new work	**3,658**	**-7.1**	**-10.9**	**-27.1**	**-9.3**	**15.5**

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

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

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

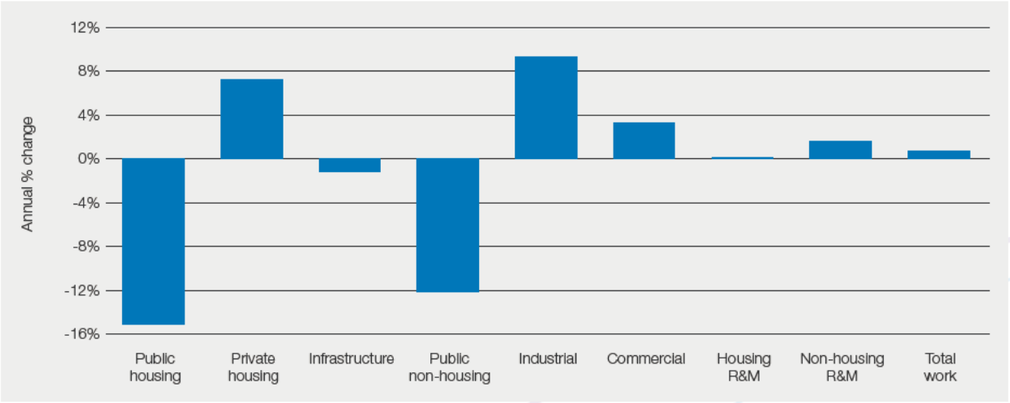
In the six months to June 2011, construction output in the East Midlands totalled £3.6bn in current prices, 7% higher than in the corresponding period of 2010. Growth was stronger in the R&M sector where output rose by 12%, year-on-year, compared with a weaker increase of 4% for new work output.

The construction industry in the East Midlands returned to growth in 2010 following 3 years of double-digit declines. However, construction output in the region is expected to have fallen overall in real terms in 2011 and will not return to growth until 2013. This is largely due to projected declines in new work output with the R&M sector expected to see a weak increase in output in each year.

The industrial construction sector is expected to see the strongest growth in the short term, rising at an average rate of 9.3%. The sector has contracted substantially during the recession and the strong growth is partly a bounce-back effect as demand begins to recover. The private housing sector is also forecast to see strong growth in the 2012-2013 period, reflecting an increase in demand as conditions in the wider economy begin to improve.

In the short term, it is likely to be the public housing and public non-housing sectors which fare the worst, with average annual declines of 15% and 12%. This is not surprising considering the public expenditure cuts that have been announced. In the six months to September 2011, there were just 25 affordable housing starts in the East Midlands, according to the Homes and Communities Agency (HCA), compared to 805 in the corresponding period of 2010. This suggests that output is likely to fall substantially, certainly in the shorter term.

Annual average construction output growth 2012-2013 - East Midlands



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

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

	Actual	Forecast annual % change			Annual average
	2010	2011	2012	2013	2012-13
Public housing	208	-19%	-23%	-7%	-15.1%
Private housing	871	6%	6%	8%	7.2%
Infrastructure	658	9%	-1%	-2%	-1.2%
Public non-housing	784	-6%	-16%	-8%	-12.1%
Industrial	336	-8%	5%	14%	9.3%
Commercial	1,401	-11%	-1%	8%	3.3%
New work	**4,258**	**-4%**	**-3%**	**4%**	**0.6%**
Housing R&M	1,055	3%	0%	0%	0.1%
Non-housing R&M	919	2%	1%	2%	1.6%
Total R&M	**1,973**	**2%**	**0%**	**1%**	**0.8%**
Total work	**6,232**	**-2%**	**-2%**	**3%**	**0.7%**

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

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

The construction industry in the East Midlands is expected to see average annual output growth of 1% per year between 2012 and 2016, weaker than the UK average of 1.4%. Whilst the region's new work sector is forecast to see an average increase of just 0.8% per year, the prospects are stronger for the R&M sector with average annual growth of 1.3% expected over the forecast period.

The most buoyant sector in the region is expected to be the private housing one, with growth averaging 5.6% per year. Output in the sector fell dramatically during the recession and was just 39% of its 2006 peak in 2010. Credit conditions are expected to ease over the next couple of years, and this, coupled with improving conditions in the wider economy is likely to underpin increasing demand for private housing.

Average annual growth in the industrial sector is forecast to be 4.7% over the 2012-2016 period. In addition to improving demand for facilities as the manufacturing sector continues to grow, there are a number of warehousing projects expected in the region over the next couple of years, including a warehousing and distribution development in Corby, for which planning permission has just been granted.

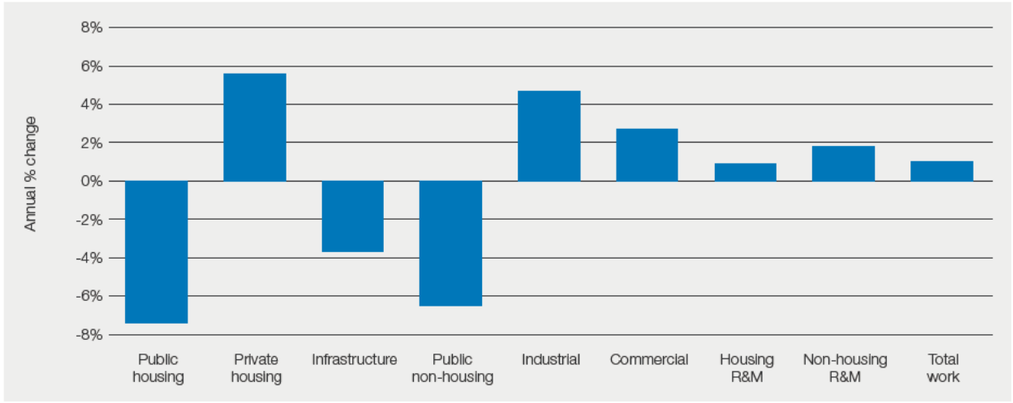
The commercial construction sector is forecast to return to growth in 2013, rising at an average rate of 2.7% per year over the 2012-2016 period as a whole. Output in the sector has fallen substantially during the recession and a number of developments have been mothballed due to lack of demand and financing issues. Conditions in the wider economy are set to improve which should stimulate demand for offices and retail facilities. A planned £200m extension to the Victoria Shopping Centre is due to start during the forecast period.

Construction on the £680m Nottingham Express Transit (NET) Line 2 is due to have started at the end of 2011 and is expected to be completed by 2015. Despite this, the infrastructure sector is forecast to see a decline of 3.7% per year, on average, over the 2012-2016 period. The region's infrastructure sector has benefitted from substantial improvement works on the M1 in recent years which has taken output to an 11-year high. There is very little else of a significant size expected to come on line during the forecast period and thus even the work on the NET Line 2 will not be enough to replace the volumes of work seen over the past few years.

The two public sectors, housing and non-housing, are expected to fare the worst over the forecast period, as is the case across most of the UK. Public non-housing output is forecast to decline by 6.5% per year, on average, over the 2012-2016 period. This is slightly weaker than the national figure of a 9.1% contraction. The East Midlands did not benefit as much as some other regions from the early waves of the Building Schools for the Future (BSF) programme and thus the sector has less far to fall. Growth is expected to return to the sector towards the end of the forecast period, albeit only weak at just 1% in 2016.

Output in the public housing sector is projected to see an average annual decline of 7.4% per year. The funding pot for affordable housing in England has been almost halved for the 2011-2015, compared with the 2008-11 programme. Thus it is inevitable that it will impact on all regions in terms of lower output. The new funding mechanism relies on social housing providers raising funds from other sources, something which they are likely to struggle to do while credit conditions remain tight.

Annual average construction output growth 2012-2016 - East Midlands



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

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

	Estimate	Forecast annual % change					Annual average
	2011	2012	2013	2014	2015	2016	2012-16
Public housing	168	-23%	-7%	-5%	0%	0%	-7.4%
Private housing	925	6%	8%	6%	5%	3%	5.6%
Infrastructure	717	-1%	-2%	-6%	-4%	-6%	-3.7%
Public non-housing	737	-16%	-8%	-9%	0%	1%	-6.5%
Industrial	310	5%	14%	2%	2%	0%	4.7%
Commercial	1,247	-1%	8%	3%	2%	2%	2.7%
New work	**4,104**	**-3%**	**4%**	**0%**	**2%**	**1%**	**0.8%**
Housing R&M	1,086	0%	0%	2%	2%	0%	0.9%
Non-housing R&M	936	1%	2%	2%	2%	2%	1.8%
R&M	**2,022**	**0%**	**1%**	**2%**	**2%**	**1%**	**1.3%**
Total work	**6,126**	**-2%**	**3%**	**1%**	**2%**	**1%**	**1.0%**

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

2.10 Beyond 2016

There are a number of offshore wind farms planned in the region, including one at Triton Knoll, where construction in due to start in 2017. The wind farm is due to become operational in phases from 2018.

In addition to these energy projects, it is likely that the retrofitting of energy efficiency measures and the installation of microgeneration technologies will become relatively more important in driving construction output in the East Midlands over the longer term. Increased concern over carbon emission reduction targets, along with rising energy costs, is likely to drive demand for this work

3. Construction employment forecasts for East Midlands

3.1 Total construction employment forecasts by occupation

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

In 2016, total construction employment in the East Midlands is expected to total around 152,770, 2.6% higher than its projected level in 2012, but still 17% down on its 2006 peak. Employment in the region began to decline in 2007 and is expected to continue until 2014. It is forecast to start to rise again in 2015, largely due to the relatively stronger growth in the more labour-intensive R&M sector, but over the 2012-2016 as a whole, it is expected to see an average decline of 0.2% per year.

In absolute terms, the largest increases in construction-specific employment are expected for surveyors (660), logistics personnel (250) and painters and decorators (230). In terms of the percentage of base 2012 employment, logistics personnel (24%) are likely to be the most in demand. Workers in this occupation are prevalent across a number of sectors and thus they are likely to benefit from growth in the private housing sector, for example.

Surveyors (11%) and architects (10%) are also expected to see strong growth in employment over the period to 2016. Workers in these occupations tend to be involved in the earlier stages of construction projects and across a range of sectors and therefore they will benefit from a return to growth in the commercial and private housing sectors.

Total employment by occupation - East Midlands

	Actual	Forecast	
	2010	2012	2016
Senior, executive, and business process managers	6,770	6,830	8,230
Construction managers	16,070	16,870	20,680
Non-construction professional, technical, IT, and other office-based staff	14,520	13,060	14,230
Wood trades and interior fit-out	18,440	18,400	17,150
Bricklayers	5,670	5,210	4,570
Building envelope specialists	3,910	3,570	3,420
Painters and decorators	6,070	5,370	5,600
Plasterers and dry liners	4,360	3,900	3,960
Roofers	2,620	2,910	2,720
Floorers	2,770	2,530	2,240
Glaziers	2,700	2,450	2,160
Specialist building operatives nec*	3,840	4,040	3,840
Scaffolders	1,300	1,220	1,280
Plant operatives	2,930	2,670	2,550
Plant mechanics/fitters	2,970	2,500	2,050
Steel erectors/structural	1,520	1,390	1,520
Labourers nec*	6,580	6,040	5,740
Electrical trades and installation	15,730	15,600	14,670
Plumbing and HVAC Trades	9,860	9,180	8,770
Logistics	1,200	1,040	1,290
Civil engineering operatives nec*	4,500	4,770	4,440
Non–construction operatives	3,030	3,140	3,380
Civil engineers	2,050	1,910	1,740
Other construction professionals and technical staff	8,040	7,120	8,520
Architects	1,520	1,370	1,510
Surveyors	5,580	5,850	6,510
Total (SIC 41-43)	**137,360**	**132,690**	**134,490**
Total (SIC 41-43, 71.1, 74.9)	**154,550**	**148,940**	**152,770**

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

3.2 Annual recruitment requirements (ARR) by occupation

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

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

The ARR for the 2012-2016 period for the 26 occupational groups within the East Midland's construction industry is illustrated in the table. The ARR of 3,460 is 400 less than that predicted in 2010 for the 2011-2015 period (3,860).

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

The region's ARR is equivalent to 2.3% of projected employment in 2012, higher than the national average of 1.9%. In absolute terms, the largest requirements for construction-specific occupations are for painters and decorators (340), wood trades and interior fit-out (290) and steel erectors/structural (250). However, as a percentage of base 2012 employment, steel erectors/structural (18%) and scaffolders (17%) will be most in demand.

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

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

Annual recruitment requirement by occupation - East Midlands

	2012-2016
Senior, executive, and business process managers	-
Construction managers	500
Non-construction professional, technical, IT, and other office-based staff	240
Wood trades and interior fit-out	290
Bricklayers	-
Building envelope specialists	90
Painters and decorators	340
Plasterers and dry liners	-
Roofers	-
Floorers	-
Glaziers	-
Specialist building operatives nec*	<50
Scaffolders	210
Plant operatives	80
Plant mechanics/fitters	-
Steel erectors/structural	250
Labourers nec*	1,050
Electrical trades and installation	-
Plumbing and HVAC Trades	-
Logistics	-
Civil engineering operatives nec*	<50
Non–construction operatives	-
Civil engineers	70
Other construction professionals and technical staff	230
Architects	90
Surveyors	-
Total (SIC 41-43)	**3,070**
Total (SIC 41-43, 71.1, 74.9)	**3,460**

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

4. Comparisons across the UK

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

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

There are a number of reasons for the emergence of this north/south divide. The first is the more constrained outlook for public expenditure going forward. While declines in public housing activity are expected to be fairly similar across the board, with one or two exceptions, the profile for the public non-residential sector is very different. Output in this sector hit a new historic high in 2010 and since 2007 had grown by over 72% in real terms, primarily driven by work under the BSF programme. The East Midlands did not benefit as much as other regions from the early waves of the BSF programme and therefore has less far to fall once the remaining projects start to complete.

Second, major infrastructure projects are tending to be greater south-east centric at present. Infrastructure activity in the UK is at a historic high, exceeding its previous peak in 1993 during the building of the Channel Tunnel. This level of activity is being driven largely by projects in the south-east corner of England – Crossrail, Thameslink, M25 widening, London Gateway port, to name a few. That is not to say that there are not projects elsewhere, there are, but they are tending to be of a lesser size. The Nottingham Express Transit Line 2 is due to commence shortly, but this will not be sufficient to replace the volumes of work seen in recent years in the region, with the completion of the M1 project in the East Midlands.

Third, growth in the commercial sector is likely to be stronger in the greater south east than elsewhere in England. The offices market has already been strengthening in London and along the M4 corridor/Thames Valley, while excess capacity issues remain a problem across many regional centres. The northern English regions also have many currently mothballed retail and leisure developments for which it is difficult to see an economic imperative to restart, at least in the short term. One large project that is due to start in the East Midlands is the extension of the Victoria Shopping Centre in Nottingham, with an expected build time of 3 years.

Given the relatively weak output performance in the region, it is not surprising that the East Midlands is expected to see an average decline of 0.2% per year in employment over the five years to 2016, compared with growth of 0.6% across the UK as a whole. Wales is predicted to have the strongest growth in employment, despite only moderate growth in output. That is because most of its growth is focused in the more labour intensive repair and maintenance sectors. Not surprisingly, employment growth is also stronger than the UK average in the South East, Greater London and the East of England.

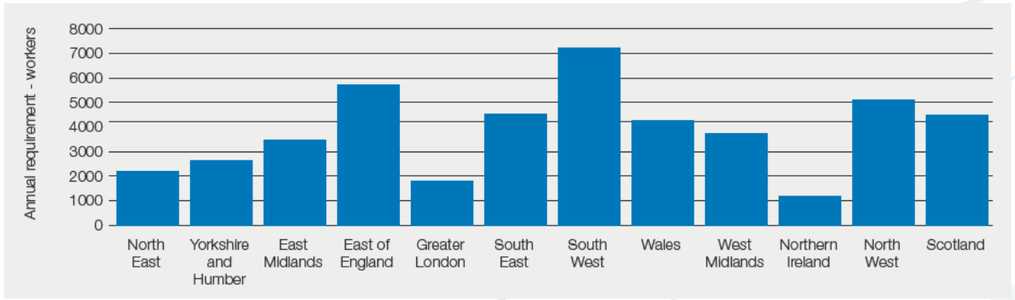
The East Midland's ARR as a percentage of 2012 employment at 2.3% is slightly stronger than the UK average, indicating a stronger level of net employment outflows in the region than in the UK as a whole.

The strengthening conditions in the **macro economy** are also likely **to lead to a recovery** in demand for office and leisure facilities.

Annual average output growth by region 2012-2016

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

Annual recruitment requirement (ARR) by region 2012-2016



Source: CSN, Experian

David Lock Associates Ltd

The most buoyant sector in the region is expected to be the **private housing one,** with growth averaging **5.6% per year.**

5. CSN explained

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

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

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

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

Section 5.5 gives a detailed breakdown of the 26 occupational groups into the individual standard occupational classification (SOC) codes that are aggregated to provide the employment and recruitment requirement.

Section 5.6 then concludes by giving details about the range of LMI reports, the advantages of being a CSN member and the contact details should people be interested in joining.

5.1 CSN methodology

Background

The **Construction Skills Network (CSN)**, launched in 2005, represents a radical change in the way that ConstructionSkills collect and produce information on the future employment and training needs of the industry. CITB-ConstructionSkills, CIC and CITB Northern Ireland are working as ConstructionSkills, the Sector Skills Council for Construction to produce robust Labour Market Intelligence to provide a foundation on which to plan for future skills needs and to target investment.

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

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

At the heart of the CSN are a number of forecasting models which generate forecasts of employment requirements within the industry for a range of occupational groups. The models are designed and managed by Experian under the independent guidance and validation of the Technical Reference Group, comprised of statisticians and modelling experts.

It is envisaged that the models will evolve over time as new research is published and modelling techniques improve. Future changes to the model will only be made after consultation with the Technical Reference Group.

The model approach

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

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

The **annual recruitment requirement (ARR)** is a gross requirement that takes into account workforce flows into and out of construction, due to such factors as movements between industries, migration, sickness, and retirement. However, these flows do not include movements into the industry from training, although robust data on training provision is being developed by ConstructionSkills in partnership with public funding agencies, Further Education, Higher Education and employer representatives. Thus, the annual recruitment requirement provides an indication of the number of new employees that would need to be recruited into construction each year in order to realise forecast output.

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

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

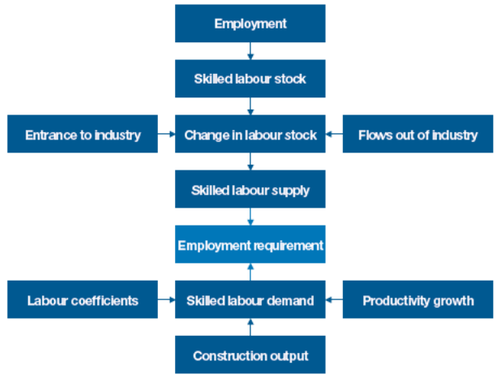
- transfers to other industries
- international/domestic OUT migration
- permanent retirements (including permanently sick)
- outflow to temporarily sick and home duties.

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

Flows into the labour market include:

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

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



5.2 Glossary of terms

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

5.3 Notes and footprints

Notes

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

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

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

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

5 Employment numbers are rounded to the nearest 10.

6 The tables include data relating to plumbers and electricians. As part of SIC 45, plumbers and electricians working in contracting are an integral part of the construction process. However, it is recognised by ConstructionSkills that SummitSkills has responsibility for these occupations across a range of SIC codes, including SIC 45.31 and 45.33.

Footprints for Built Environment SSCs

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

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

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

* AssetSkills has a peripheral interest in SIC 74.2

The sector footprints for the other SSCs covering the Built Environment:

SummitSkills

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

Coverage – Building Services Engineering.

ConstructionSkills shares an interest with SummitSkills in SIC 45.31 Installation of wiring and fittings and SIC 45.33 Plumbing. ConstructionSkills recognises the responsibility of Summit Skills across Standard Industrial Classfications (SIC) 45.31 and 45.33, thus data relating to the building services engineering sector is included here primarily for completeness.

AssetSkills

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

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

AssetSkills has a peripheral interest in SIC 74.2.

Energy and Utility Skills

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

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

5.4 Definitions: types and examples of construction work

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

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

Private sector housing

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

Infrastructure - public and private

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

Sewerage
Sewage disposal works, laying of sewers and surface drains.

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

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

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

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

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

Public non-residential construction[1]

Factories and warehouses
Publicly owned factories, warehouses, skill centres.

Oil, steel, coal
Now restricted to remedial works for public sector residual bodies.

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

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

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

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

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

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

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

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

Private industrial work

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

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

Private commercial work[2]

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

Health
Private hospitals, nursing homes, clinics.

Offices
Office buildings, banks.

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

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

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

Agriculture
All buildings and work on farms, horticultural establishments.

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

New work

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

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

Repair and maintenance

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

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

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

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

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

5.5 Occupational groups

Occuptional group

Description, SOC reference.

Senior, executive and business process managers

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

Construction managers

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

Non-construction professional, technical, IT, and other office–based staff (excl. managers)

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

Wood trades and interior fit-out

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

Bricklayers

Bricklayers, masons, 5312

Building envelope specialists

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

Painters and decorators

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

Plasterers and dry liners

Plasterers, 5321

Roofers

Roofers, roof tilers and slaters, 5313

Floorers

Floorers and wall tilers, 5322

Glaziers

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

Specialist building operatives nec*

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

Scaffolders

Scaffolders, stagers, riggers, 8141

Plant operatives

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

Plant mechanics/fitters

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

Steel erectors/structural

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

Labourers nec*

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

Electrical trades and installation

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

Plumbing and heating, ventilation, and air conditioning trades

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

Logistics

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

Civil engineering operatives nec*

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

Non-construction operatives

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

Civil engineers

Civil engineers, 2121

Other construction professionals and technical staff

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

Architects

Architects, 2431

Surveyors

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

5.6 CSN website and contact details

The CSN website – http://www.cskills.org/csn

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

The main UK report, along with the twelve LMI reports (one for Northern Ireland, Scotland, Wales and each of the nine English regions) can be downloaded from the site, while research reports such as the '2020Vision' and 'Closer look at Greater London' are also freely available.

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

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

The website also contains further information about:

- how the CSN functions
- the CSN Model approach
- how the Model can be used to explore scenarios
- CSN team contact information
- access to related ConstructionSkills research
- details for those interested in becoming members of the network.

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

CSN members area

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

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

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

CSN members therefore have:

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

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

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

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

Contact details

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

For more information about the
Construction Skills Network, contact
Lee Bryer
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0344 994 4400
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http://www.cskills.org/contact-us/offices.aspx

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

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

Alliance Sector Skills Councils