Workload Trends 2013 Q4

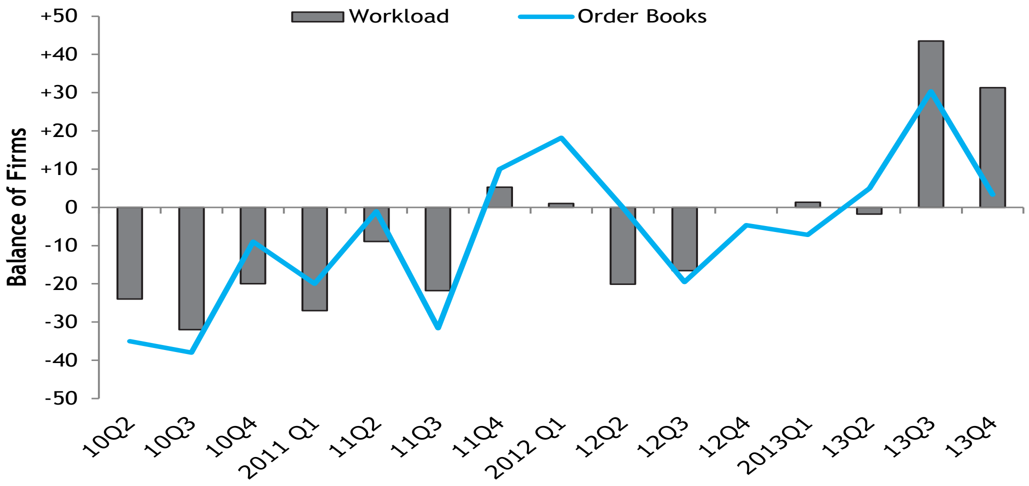
Growth Continues but Orders outlook worsens

Weighted Balances (%)

Change on 12 Months Ago	
Workload	
2012 Q4	0
2013 Q4	+31
Tender Prices	
New Work	
2012 Q4	-8
2013 Q4	+36
R&M Work	
2012 Q4	-6
2013 Q4	+31
Order Books	
2012 Q4	-5
2013 Q4	+3
Over the Next 12 Months	
Expected Workload	
2012 Q4	-3
2013 Q4	+58
Expected Orders	
New Work	
2012 Q4	-1
2013 Q4	+46
R&M Work	
2012 Q4	-7
2013 Q4	+39

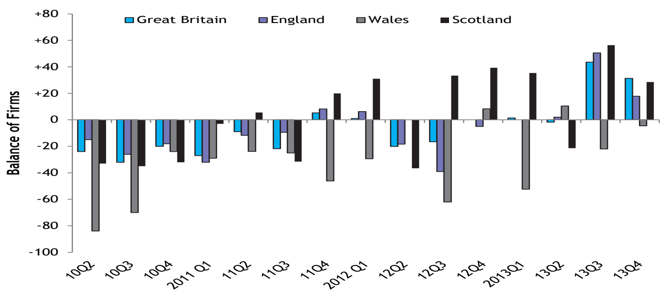
- Workloads increase for a second consecutive quarter according to 31% of British firms, on balance
- 8 out of 10 sectors showed growth in workloads, only airports and local roads showed that workloads had declined, on balance
- Tender prices were higher compared to 12 months ago, on balance, for 36% and 31% of firms for new construction work and improvements, and for repair and maintenance work, respectively
- According to a balance of 58% of firms, workloads during the next 12 months are expected to increase
- On balance, 48% of firms in Britain expect the employment of operatives and staff to increase in the next 12 months

Change in Workloads and Order Books - Great Britain



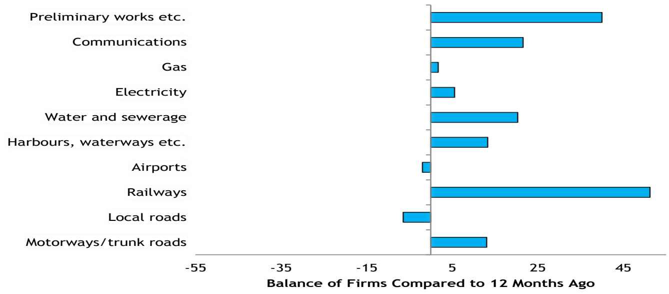
Trends in Workload

Workloads Compared to 12 Months Ago



Workloads increased, on balance, for a second quarter in Q4. In Great Britain 31% of firms on balance, reported that workloads had increased. Overall, just 19% of firms reported that workloads had declined. In England, 27% of respondents reported that workloads had fallen, compared to 12% in Q3. However, the balance remained positive; 18% of firms, on balance, reported an increase, compared to 51% in Q3. In Scotland, 55% of firms reported that workloads were unchanged on a year earlier, but only 8% reported that workloads were lower, leaving a positive overall balance of 29%. In Wales, workloads declined on balance, according to 5% of firms, and 41% in total reported falls.

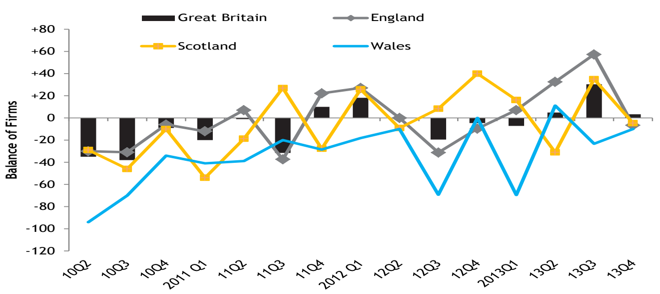
Workload — By Type of Work (GB)



Only 2 out of 10 sectors reported that workloads had declined compared to Q4 of last year, on balance. These were airports (-2%) and local roads (-6%). In Q3 however, both sectors reported positive balances, of 4% and 2%, respectively. A balance of 40% of firms reported an increase in preliminary works. 22% of firms on balance, reported an increase in communications. Gas (2%), electricity (6%), water and sewerage (20%), and harbours/waterways (13%) reported increasing workloads on balance. For a fifth consecutive quarter, railways remained the strongest sector for improved workloads. Since 2013 Q2, more than 50% of respondents in each quarter, on balance, have reported increased workloads.

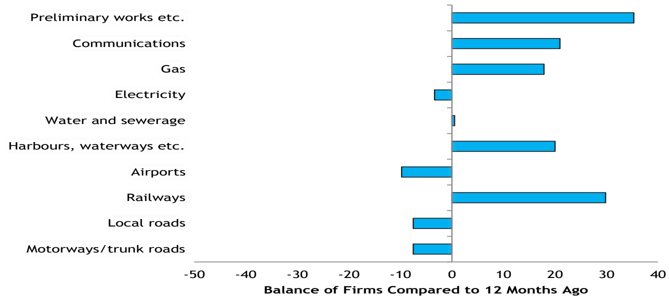
Trends in Orders and Future Expectations

Orders Compared to 12 Months Ago



Despite strong growth in orders in Q3, orders dipped in the final quarter of 2013. Compared to Q3, when orders increased according to 30% of respondents, on balance, only 3% on balance reported growth in Q4. One third of respondents reported that orders had decreased. For the first time in five quarters, a negative balance (7%) was reported in England. In Scotland, despite 35% of respondents, on balance, reporting growth in Q3, in Q4, 5% reported that order books had fallen compared to 12 months ago. In Wales, the balance of firms reporting a change in orders compared to 12 months ago remained negative for the second quarter in a row. On balance, 10% of firms reported orders declining.

Order Books — By Type of Work (GB)



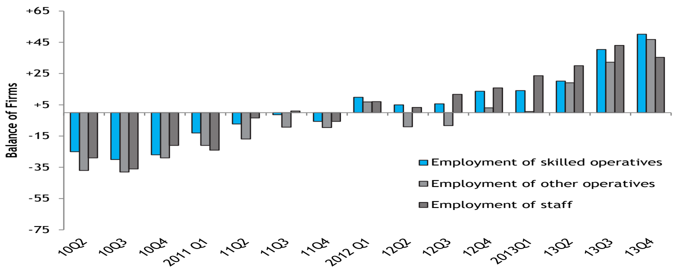
4 out of 10 sectors reported a fall in orders compared to 12 months ago, on balance. A balance of 3% reported a fall in electricity orders, compared to 28% reporting growth in Q3. 10% of respondents, on balance, reported a fall in orders in airports. Similarly, a balance of 8% of firms reported that local roads and motorways/trunk roads orders had fallen. Water and sewerage orders were broadly unchanged compared to a year ago according to 1% of respondents. On balance, orders improved in the remaining sectors; preliminary works (35%), communications (21%), gas (18%), harbours/waterways (20%) and railways (30%).

Expected Future Trends in the Next 12 Months

Expected future trends improved in Great Britain for a fourth consecutive quarter. On balance, 58% of firms reported that workloads are expected to increase in the next 12 months, the highest balance since 2007 Q3. In England, 61% of firms on balance expect workloads to increase. In Wales this figure was 10% and in Scotland, 47% of firms expect workloads to increase. 46% of British firms expect new work orders to be higher in the next 12 months on balance, by nation; England (44%), Wales (10%) and in Scotland (41%). For R&M orders, 39% of British firms, on balance, expect an increase during the next 12 months, this figure is 49% for English firms and 4% for Scottish firms. However 18% of Welsh firms expect R&M orders to decrease, on balance.

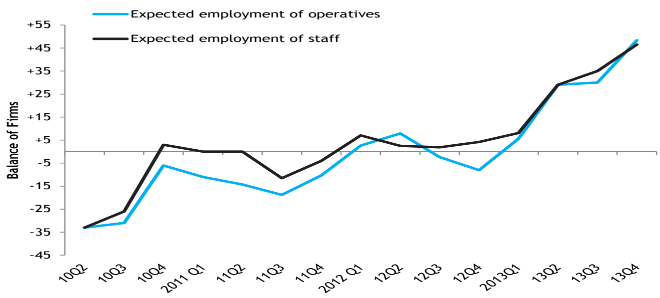
Trends in Employment

Employment Compared to 12 months Ago (GB)



For the sixth consecutive quarter employment data showed an improvement. In Britain, on balance, employment of skilled operatives, other operatives and staff improved according to 50%, 47% and 35% of firms respectively. For English firms employment increased, on balance, according to 42% of firms for operatives, 29% for other operatives and 37% for staff. In Wales balances improved significantly compared to Q3 and were positive across all three types; 22% for skilled operatives, 4% for other operatives and 26% for staff. In Scotland, on balance, increases were reported by 42% of firms for skilled operatives, 63% for other operatives and 17% for staff.

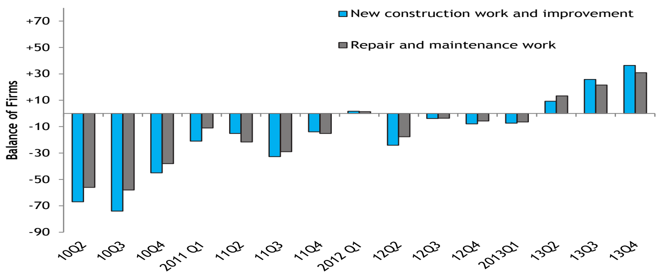
Expected Employment in the Next 12 Months



On balance, 48% of firms in Britain expect the employment of operatives and staff to increase in the next 12 months, following strong growth of 30% in Q3. In England, on balance, more than half of all respondents expect employment of operatives (53%), and staff (37%) to increase. Prospects were less optimistic in Wales. On balance, operatives and staff employment is expected to increase according to just 5% of respondents. In Scotland, more than two-thirds of respondents expect employment to remain unchanged for operatives (69%) and staff (52%). However, overall, positive balances were reported, 31% and 48% respectively.

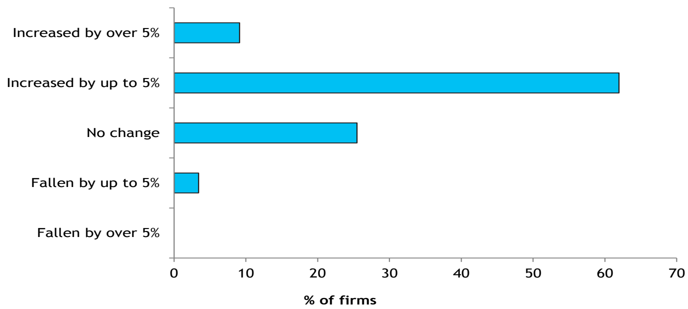
Trends in Costs, Tender Prices and Supply Constraints

Tender Prices Compared to 12 Months Ago (GB)



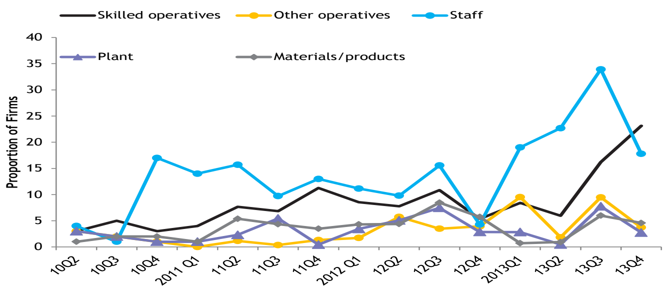
Compared to 12 months ago, tender prices were higher, on balance, for 36% and 31% of firms for new construction work and improvements, and for repair and maintenance work, respectively. In England, 23% of firms, on balance, reported higher tender prices for new construction work and improvement and 20% for repair and maintenance. In Wales, only 5% of firms, on balance, reported an increase in tender prices for new construction and improvements and 10% for repair and maintenance. In Scotland, on balance, 40% of respondents reported an increase in new construction work and improvement and 23% in repair and maintenance.

Costs Compared with 12 Months Ago (GB)



The majority of firms (62%) in Great Britain reported that costs had increased by up to 5% compared to 12 months earlier with 9% reporting increases of over 5%. Overall, on balance, 68% of firms reported an increase in costs. In England, 65% of firms, on balance, reported an increase in costs. 15% reported rises of more than 5%, 51% by up to 5%, 32% reported no change and 2% of firms reported falling costs up to 5%. 42% of firms in Scotland, on balance, reported increased costs and 11% in total reported falling costs (up to 5%). In Wales, 96% of firms, on balance, reported an increase in costs over the last 12 months. No firms reported declines. 4% of firms reported no change, 96% reported increases up to 5% but no firms reported that costs had increased by more than 5%.

Contractors Unsatisfied with Supply (GB)



Overall, the supply of suitable workers improved compared to the second quarter of 2013 for civil engineering firms in Great Britain. 23% and 4% of respondents reported dissatisfactory supply of skilled operatives and other operatives respectively. The percentage reporting dissatisfaction for staff decreased from Q3, 18% reported dissatisfaction compared to 34% last quarter. 3% of firms reported dissatisfaction with plant and 5% reported dissatisfaction with materials/products. In England, the most commonly reported dissatisfaction was skilled operatives (16%). In Wales 19% of firms reported dissatisfaction with skilled operatives, staff and plant. In Scotland the most cited issue was skilled operatives (43%).

Workload Trends Survey

1 Workload

	2010 Q1	Q2	Q3	Q4	2011 Q1	Q3	Q4	2012 Q1	Q2	Q3	Q4	2013Q1	Q2	Q3	Q4
Compared with 12 Months Ago															
By Country															
GB	-59	-24	-32	-20	-27	-22	+5	+1	-20	-17	0	+1	-2	+44	+31
England	-63	-15	-26	-18	-32	-9	+8	+6	-18	-39	-5	0	+1	+51	+18
Scotland	-59	-33	-35	-32	-3	-32	+20	+31	-37	+33	+39	+35	-21	+56	+29
Wales	-27	-84	-70	-24	-29	-25	-46	-29	0	-62	+8	-52	+11	-22	-5
By Size of Firm															
<115	-49	-49	-31	-23	-38	-12	-10	-18	-28	-8	+8	-10	+8	+41	+47
115-299	-48	-46	-59	-29	-10	0	-14	+8	+5	+27	-22	+13	-8	+64	+18
300-599	-38	-34	-20	0	0	-29	-33	+33	0	0	-20	+60	-60	0	+38
600+	-79	+4	-16	-16	-35	-35	+49	0	-33	-51	+7	-7	+8	+53	+27
By Type of Work															
Motorways & trunk roads	-23	-51	-40	-73	-61	-58	-37	-43	-53	-37	-33	-34	-6	+7	+13
Local roads	-50	-54	-49	-29	-37	-30	-41	-30	-42	-50	-30	-27	-33	+2	-6
Railways	-16	-16	-17	-2	+24	+15	+41	+32	+52	+21	+53	+28	+69	+54	+51
Airports	-32	-47	-18	-26	-23	-14	-1	-23	-5	+2	-17	-1	+19	+4	-2
Harbours, waterways etc.	-22	-15	-32	-30	-19	-11	-10	-3	+11	-15	-7	-5	+14	-4	+13
Water & sewerage	-63	-25	-23	-15	+23	+23	+12	+8	+23	+27	+1	+20	+24	+23	+20
Electricity	-53	-12	-4	+35	+17	+20	-4	+41	+28	+19	+8	+10	+16	+24	+6
Gas	-29	-37	+6	-24	-20	-28	-18	+14	-2	+24	+1	-25	+2	-2	+2
Communications	+1	+12	-10	-7	-28	-41	-35	-23	+1	-13	-34	-35	-4	-2	+22
Preliminary works, etc.	-48	-18	-26	-23	-8	-13	-15	+3	-7	-10	-12	-8	+14	+30	+40

Weighted % Balance of Respondents

2 Expected Workload

	2010 Q1	Q2	Q3	Q4	2011 Q1	Q3	Q4	2012 Q1	Q2	Q3	Q4	2013Q1	2013Q2	2013Q3	2013Q4
In the Next 12 Months															
By Country															
GB	-43	-31	-36	-10	-7	-24	+7	+10	+15	+2	-3	+1	+38	+40	+58
England	-47	-33	-34	-10	-9	-25	+9	+16	+27	+10	+4	+22	+54	+68	+61
Scotland	-27	+6	-27	+5	+5	+19	+8	-6	0	+8	-12	-5	+21	+14	+47
Wales	-50	-78	-79	-25	-23	-35	-47	+8	-18	-52	-22	-66	+3	+4	+10
By Size of Firm															
<115	-6	-43	-45	-27	-18	-16	-7	+5	-10	-9	-8	-6	+11	+38	+56
115-299	-36	-10	-22	+7	+8	-4	+5	0	+4	+19	+14	+22	+44	+75	+55
300-599	-56	-34	-29	0	0	-13	-13	+11	+21	+11	-10	-14	+17	-10	+38
600+	-68	-34	-33	-11	-12	-39	+24	+17	+30	0	-3	0	+52	+45	+66

Weighted % Balance of Respondents

3 Order Books

	2010 Q1	Q2	Q3	Q4	2011 Q1	Q3	Q4	2012 Q1	Q2	Q3	Q4	2013Q1	2013Q2	2013Q3	2013Q4
Compared with 12 Months Ago															
By Country															
GB	-39	-35	-38	-9	-20	-32	+10	+18	0	-20	-5	-7	+4	+30	+3
England	-36	-30	-31	-6	-12	-37	+22	+27	0	-31	-10	+7	+32	+57	-7
Scotland	-49	-29	-46	-10	-54	+27	-28	+26	-9	+8	+40	+16	-31	+35	-5
Wales	-39	-94	-70	-34	-41	-20	-29	-18	-10	-69	0	-70	+11	-23	-10
By Size of Firm															
<115	-46	-42	-27	-23	-35	-15	-2	-14	-12	-14	-4	-21	+12	+30	+35
115-299	-64	-59	-52	-24	-26	-5	-16	-21	+10	+17	-6	+24	0	+45	+18
300-599	-13	-40	-35	0	+33	+14	-50	+57	+25	-13	-25	0	-50	+11	+14
600+	-30	-20	-35	+4	-5	-63	+66	+35	-9	-40	0	-10	+18	+33	-13
By Type of Work															
Motorways & trunk roads	-43	-54	-62	-76	-74	-58	-23	-22	-35	-46	-21	-20	+11	-1	-8
Local roads	-59	-66	-56	-31	-39	-36	-39	-32	-43	-45	-18	-34	-16	-3	-8
Railways	+13	-29	-51	+5	+14	+15	+36	+32	+49	+7	+36	0	+63	+50	+30
Airports	-26	-67	-53	-27	-17	-16	+18	-11	+2	-5	+16	+10	+20	+4	-10
Harbours, waterways etc.	-25	-39	-32	-19	-15	-18	+1	-7	+5	-14	-6	-9	+11	+1	+20
Water & sewerage	-41	-8	-23	+1	+22	+9	+11	-1	+27	+22	-26	+2	-1	0	+1
Electricity	-42	-28	-1	+25	+30	+9	0	+22	+12	+27	+14	+27	-2	+28	-3
Gas	-48	-36	-49	-19	-19	-31	+1	-2	-8	+34	-19	-12	+18	-4	+18
Communications	-38	-14	-16	-20	-2	-30	-60	-33	-25	-13	-41	-49	-8	-9	+21
Preliminary works, etc.	-40	-28	-25	-25	-24	-26	-27	+2	-22	-20	+1	+3	+13	+26	+35

Weighted % Balance of Respondents

4 Expected Trends in New Orders

	2010 Q1	Q2	Q3	Q4	2011 Q1	Q3	Q4	2012 Q1	Q2	Q3	Q4	2013Q1	2013Q2	2013Q3	2013Q4
In the Next 12 Months															
New Work															
By Country															
GB	-40	-39	-39	-25	-6	-27	-5	+8	-2	+8	-1	+12	+22	+50	+46
England	-43	-37	-33	-26	-3	-32	-5	+15	+7	+26	+17	+39	+43	+64	+44
Scotland	-27	-31	-46	+10	-3	+31	+15	-9	-12	+2	-17	+7	-2	+16	+41
Wales	-54	-78	-82	-52	-29	-39	-58	+4	-9	-39	-11	-69	-33	+31	+10
By Size of Firm															
<115	-11	-52	-46	-31	-15	-23	0	+11	-22	-9	-14	-8	+9	+30	+48
115-299	-44	-24	-22	0	-5	+7	-22	-13	+8	+6	+9	+26	+28	+75	+45
300-599	-45	-59	-49	0	+25	-13	-13	+11	+7	+22	-10	+14	0	0	+50
600+	-56	-34	-33	-40	-7	-48	+3	+17	0	+13	+8	+15	+31	+66	+44
R&M															
By Country															
GB	-19	-34	-24	-13	+4	-11	+10	+6	+21	+0	-7	+13	+24	+29	+39
England	-18	-30	-15	-11	+1	+1	+17	+22	+38	+22	+11	+24	+41	+40	+49
Scotland	-10	-40	-39	-27	+17	+11	-13	-19	+7	-15	-41	+10	+5	+4	+4
Wales	-36	-68	-70	-25	-5	-39	-23	-21	-31	-61	-36	-77	-26	+7	-18
By Size of Firm															
<115	-16	-45	-42	-25	+3	-19	+2	+2	-14	-22	-17	-16	-4	+31	+37
115-299	-23	-22	-22	0	0	-13	-10	-14	-5	+20	-14	+9	+6	+42	+45
300-599	-33	-59	-39	0	0	-25	-29	-11	+14	-11	-29	-17	0	-22	+33
600+	-12	-27	-5	-15	+7	-3	+37	+24	+56	+13	+8	+33	+51	+42	+38

Weighted % Balance of Respondents

5 Employment

	2010 Q1	Q2	Q3	Q4	2011 Q1	Q3	Q4	2012 Q1	Q2	Q3	Q4	2013Q1	2013Q2	2013Q3	2013Q4
Compared with 12 Months Ago															
By Country															
Skilled operatives															
GB	-43	-25	-30	-27	-13	-1	-6	+10	+5	+6	+14	+14	+22	+40	+50
England	-49	-24	-27	-23	-16	-1	-7	0	+1	0	+9	+7	+39	+65	+42
Scotland	-15	-15	-31	-42	-5	+7	-4	+8	-14	+24	+23	+41	+7	+36	+42
Wales	-41	-58	-56	-42	-11	+5	-21	+4	+41	-29	+39	-3	+17	-31	+22
Other operatives															
GB	-43	-37	-38	-29	-21	-9	-10	+7	-9	-8	+3	+1	+20	+32	+47
England	-48	-39	-33	-25	-26	-8	-6	-1	-22	-18	-3	-4	+32	+48	+29
Scotland	-20	-12	-37	-52	-7	-5	-46	0	-14	+8	+16	+19	+23	+37	+63
Wales	-54	-74	-82	-44	-11	-9	-32	+4	+25	-35	+28	-7	+17	-33	+4
Staff															
GB	-29	-29	-36	-21	-24	+1	-6	+7	+3	+12	+16	+24	+33	+43	+35
England	-31	-34	-36	-19	-18	-4	-6	-1	-5	+3	+5	+20	+50	+67	+37
Scotland	-25	-2	-34	-40	-51	+36	0	0	-7	+34	+18	+35	+17	+46	+17
Wales	-13	-47	-43	-29	-6	+4	-53	-26	+18	-19	+33	+7	+20	-33	+26
By Size of Firm															
Skilled operatives															
<115	-38	-39	-31	-23	-20	-6	-5	-2	-16	-14	+13	-4	-4	+26	+44
115-299	-41	-54	-26	-35	-5	+15	-22	+4	+12	+18	+17	+18	+26	+60	+41
300-599	-45	-10	-26	-25	-50	0	-13	+33	+7	0	+20	+29	-14	+30	+13
600+	-45	-8	-38	-24	-9	-6	+4	+10	+12	+16	+11	+19	+41	+44	+65
Other operatives															
<115	-49	-51	-31	-25	-13	-10	-10	-9	-21	-14	+3	-13	0	+19	+36
115-299	-49	-63	-52	-43	-22	-4	-18	-4	+8	+6	0	+14	+33	+48	+20
300-599	-33	-10	-26	-25	-50	-11	-38	+22	0	+11	+10	+29	0	+20	+25
600+	-39	-25	-38	-24	-21	-11	+4	+15	-14	-20	+2	-3	+30	+36	+65
Staff															
<115	-21	-35	-25	-4	-13	0	-12	-9	-6	-5	+1	+8	+9	+14	+28
115-299	-37	-51	-34	-32	-13	+7	-4	-9	+28	+18	+30	+18	+37	+57	+41
300-599	-22	+4	-14	-25	-75	0	-13	+22	-7	+22	+30	+43	0	+40	+13
600+	-30	-25	-36	-24	-16	-1	0	+17	+3	+16	+14	+28	+51	+51	+43

Weighted % Balance of Respondents

6 Expected Employment

	2010 Q1	Q2	Q3	Q4	2011 Q1	Q3	Q4	2012 Q1	Q2	Q3	Q4	2013Q1	2013Q2	2013Q3	2013Q4
In the Next 12 Months															
By Country															
Operative jobs															
GB	-40	-33	-31	-6	-11	-19	-10	+3	+8	-2	-8	+6	+28	+30	+48
England	-42	-31	-23	-2	-10	-24	-18	+4	+16	+7	-1	+21	+51	+65	+53
Scotland	-25	-24	-49	-5	0	+10	+13	-6	-2	-6	-10	-6	+10	+18	+31
Wales	-55	-73	-70	-38	-41	-26	-47	+4	-27	-48	-28	-24	+3	-16	+5
Employment of staff															
GB	-26	-33	-26	+3	0	-12	-4	+7	+3	+2	+4	+8	+28	+35	+47
England	-25	-32	-15	+7	0	-22	-5	+12	+11	+9	+12	+23	+50	+63	+37
Scotland	-20	-27	-56	0	0	+21	+8	-9	-17	+6	-12	-4	+12	+16	+48
Wales	-45	-63	-61	-21	-12	-22	-47	0	-18	-42	-11	-17	0	-11	+5
By Size of Firm															
Operative jobs															
<115	-5	-41	-25	-21	-28	-11	-3	-7	-7	-13	-8	0	+2	+33	+46
115-299	-35	-10	-34	-4	0	0	-5	+4	0	+6	+9	+13	+39	+60	+55
300-599	-56	-59	-43	0	+25	-25	-25	+11	+7	0	-30	-29	0	0	+38
600+	-56	-31	-25	0	-16	-28	-13	+4	+20	0	-7	+13	+42	+29	+50
Employment of staff															
<115	-5	-35	-23	-7	-15	-7	-7	-2	-7	-7	-3	+1	+15	+27	+41
115-299	-29	-9	-36	+4	+13	+4	0	+4	+8	+13	+14	+9	+33	+65	+59
300-599	-33	-59	-32	0	+25	-13	-25	+11	-7	+11	-10	0	-17	+10	+38
600+	-56	-38	-12	+10	-5	-20	+3	+12	+10	0	+11	+13	+42	+37	+47

Weighted % Balance of Respondents

7 Costs

	2010 Q1	Q2	Q3	Q4	2011 Q1	Q3*	Q4	2012 Q1	Q2	Q3	Q4	2013Q1	2013Q2	2013Q3	2013Q4
Compared with 12 Months Ago (%)															
GB															
Falling	+29	+10	+9	+4	+6	+3	+0	0	+1	+0	+4	+8	0	+1	0
Unchanged	+9	+15	+31	+19	+18	+15	+1	+4	+11	+3	+1	+0	+7	+5	+3
Slower	+39	+28	+30	+29	+9	+26	+27	+22	+23	+22	+23	+20	+22	+18	+25
Same rate	+23	+25	+25	+31	+25	+45	+62	+64	+55	+69	+61	+61	+67	+72	+62
Faster	0	+23	+6	+18	+42	+12	+10	+10	+10	+6	+11	+10	+5	+4	+9
Cost Balances															
By Country															
GB	+33	+66	+52	+74	+70	+40	+70	+70	+54	+71	+67	+63	+65	+71	+68
England	+48	+50	+54	+80	+70	+42	+72	+73	+48	+77	+68	+62	+72	+75	+65
Scotland	+46	+66	+40	+9	+67	+49	+54	+58	+53	+70	+57	+81	+62	+76	+42
Wales	+18	+53	+47	+92	+76	+70	+63	+72	+50	+87	+78	+10	+10	+38	+96
By Size of Firm															
<115	+73	+77	+77	+91	+79	+69	+79	+75	+66	+68	+78	+82	+74	+71	+82
115-299	+37	+13	+37	+61	+77	+63	+65	+57	+44	+47	+70	+82	+72	+81	+70
300-599	+33	+52	+43	+50	+75	+50	+50	+89	+67	+67	+70	+86	+67	+80	+75
600+	+33	+61	+27	+76	+67	+13	+73	+67	+46	+84	+59	+44	+58	+66	+60

* Discontinuity in series due to an amendment to the question in order to collect more detailed information on the degree of cost change.

8 Tender Prices	2010 Q1	Q2	Q3	Q4	2011 Q1	Q3	Q4	2012 Q1	Q2	Q3	Q4	2013Q1	2013Q2	2013Q3	2013Q4
Compared with 12 Months Ago															
New work															
By Country															
GB	-61	-67	-74	-45	-21	-33	-14	+2	-24	-4	-8	-7	+10	+26	+36
England	-62	-70	-76	-42	-17	-35	-14	-7	-29	-4	-11	-12	+25	+21	+23
Scotland	-64	-55	-66	+62	-23	-21	-38	-23	-29	-28	-5	+2	+7	+10	+40
Wales	-50	-63	-70	-56	-35	-52	-53	+4	-73	+20	-61	-86	-63	+4	+5
By Size of Firm															
<115	-38	-56	-51	-47	-11	-21	-3	-13	-23	-25	-9	-1	+22	+29	+29
115-299	-64	-61	-77	-42	-18	-26	-23	0	-38	-25	+18	+13	0	+37	+36
300-599	-33	-48	-57	-50	-50	-38	-63	+11	+13	-33	-40	-14	-33	-20	+13
600+	-85	-81	-100	-45	-7	-40	0	+7	-37	+29	-6	-15	+17	+34	+46
R&M															
By Country															
GB	-59	-56	-58	-38	-11	-29	-15	+1	-18	-4	-6	-6	+13	+22	+31
England	-62	-52	-58	-34	-5	-22	-17	-13	-25	0	-12	-19	+23	+11	+20
Scotland	-58	-79	-57	-74	-28	-54	-36	-16	-21	-24	-5	+13	+8	+2	+23
Wales	-36	-53	-57	-42	-29	-43	-46	+24	-44	-16	-38	-62	-58	+14	+10
By Size of Firm															
<115	-29	-52	-45	-43	-19	-13	0	-12	-16	-9	-8	-3	+18	+16	+24
115-299	-56	-62	-69	-42	-18	-30	-26	-5	-30	-14	+14	0	-13	+30	+41
300-599	-44	-59	-32	-33	0	-38	-57	+25	+21	-33	-29	0	-33	0	+13
600+	-85	-54	-79	-33	+7	-34	-8	+3	-31	+18	-6	-11	+33	+28	+35

Weighted % Balance of Respondents

9 Supply of Resources Required	2010 Q1	Q2	Q3	Q4	2011 Q1	Q3	Q4	2012 Q1	Q2	Q3	Q4	2013Q1	2013Q2	2013Q3	2013Q4
Skilled Operatives															
GB	8	3	5	3	4	7	11	9	8	11	5	8	6	16	23
England	8	2	5	2	5	5	15	8	11	6	5	6	4	3	16
Scotland	11	5	7	0	3	18	0	13	5	10	14	17	12	40	43
Wales	0	0	0	8	0	0	0	12	9	35	0	0	0	31	19
Other Operatives															
GB	5	3	2	1	0	0	1	2	6	3	4	10	2	9	4
England	7	2	2	1	1	0	0	0	10	3	7	10	2	5	6
Scotland	0	0	2	0	0	0	0	10	0	6	0	12	5	10	5
Wales	0	5	0	0	0	0	0	0	0	0	0	14	0	20	0
Staff															
GB	6	4	1	17	14	10	13	11	10	16	4	19	23	34	18
England	6	5	1	20	19	5	19	14	15	13	4	13	25	23	11
Scotland	7	0	0	0	0	41	0	3	5	0	2	28	3	32	26
Wales	0	0	0	8	0	0	0	12	0	35	11	0	7	44	19
Plant															
GB	0	3	2	1	1	5	0	3	5	7	3	3	0	8	3
England	0	1	3	0	1	8	1	0	6	12	2	0	1	3	1
Scotland	0	21	0	0	0	0	0	5	0	2	2	10	0	14	3
Wales	0	21	0	4	0	0	0	0	0	0	22	0	0	20	19
Materials and Products															
GB	3	1	2	2	1	4	3	4	4	8	6	1	1	6	5
England	1	2	0	1	1	7	5	2	7	13	11	1	1	2	5
Scotland	16	0	10	0	3	0	0	3	2	8	0	1	3	6	3
Wales	0	0	0	4	0	0	0	0	0	0	0	0	0	20	0

% of Respondents Reporting Unsatisfactory Availability of Resources

About the Civil Engineering Contractors Association (CECA) and Workload Trends

The number of contractors taking part in CECA's 2013 Q4 survey totalled 107. The survey responses are weighted by size of firm to ensure that results are representative of the industry. The results displayed are typically weighted balances and are calculated by taking the difference between firms reporting an increase in workloads, for example, and the proportion of firms experiencing a fall.

CECA has over 300 member firms which carry out more than 80% of all civil engineering work in Great Britain. The quarterly CECA survey of civil engineering workload trends, in which more than a third of the membership takes part, tests for changes over the past year in contractors' workload, workforce, order books, cost trends, and tender prices. It also examines the supply situation for key resources, and contractors' expectations of trends in new orders and employment in the coming 12 months. Full reports of the CECA survey are available to non-members; £30 per single copy or £100 for an annual subscription.

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