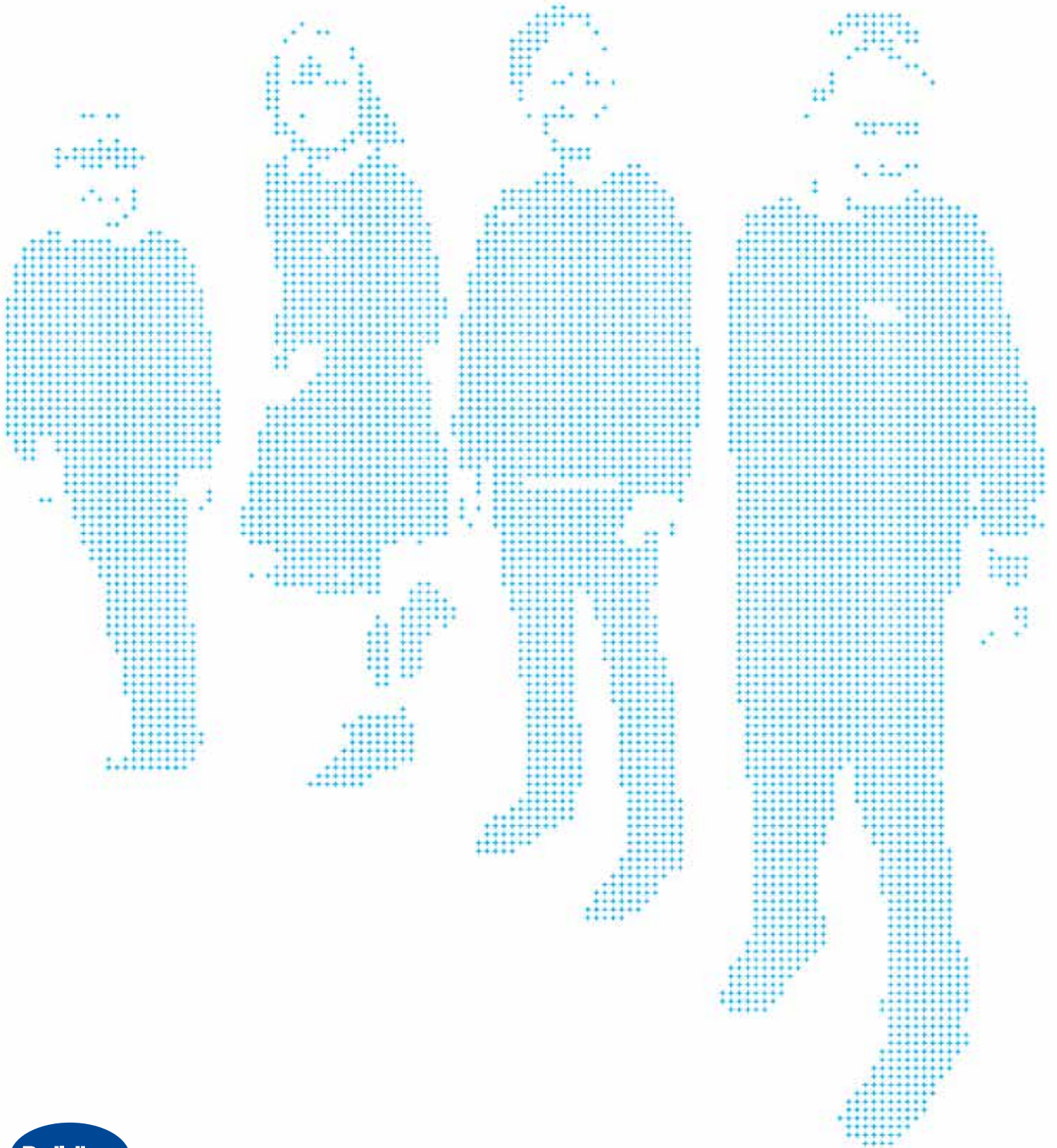


# WHITE PAPERS UK EDUCATION 2013-15



# JUNE 2014 UPDATE

## 1/UPDATE SUMMARY

Since Building published its UK Education 2013-15 white paper, in January 2013, the education sector in the UK has begun to experience significant recovery from the cuts it suffered during recession.

Work across all sectors of education spend combined, including primary, secondary, and higher and further education (HEFE), grew by 39% in 2013, according to data from economic analyst Barbour ABI. While the sector clearly has some way to go to near pre-recession levels, its growth trajectory is now established. This recovery has been

underpinned by continued high levels of spending in HEFE, and by a sharp upturn in primary school work.

This new eight-page preface to the original UK Education 2013-15 white paper supplements its market research with detailed education capital spending statistics for 2012 and 2013, analysis of key current and future spending trends in schools and HEFE, and updated public funding information for 2014-15 and beyond. The update also includes a detailed report on the progress of the Priority Schools Building Programme.

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### 3/ RECENT EDUCATION SECTOR SPENDING TRENDS

In total, the value of construction contracts awarded in the education sector across England, Scotland and Wales leapt by 39% in 2013 compared with 2012, according to contracts award data from Barbour ABI covering primary, secondary, FE and HE sectors. The combined education sector was worth £4.6bn in 2012, with this growing to £6.4bn in 2013.

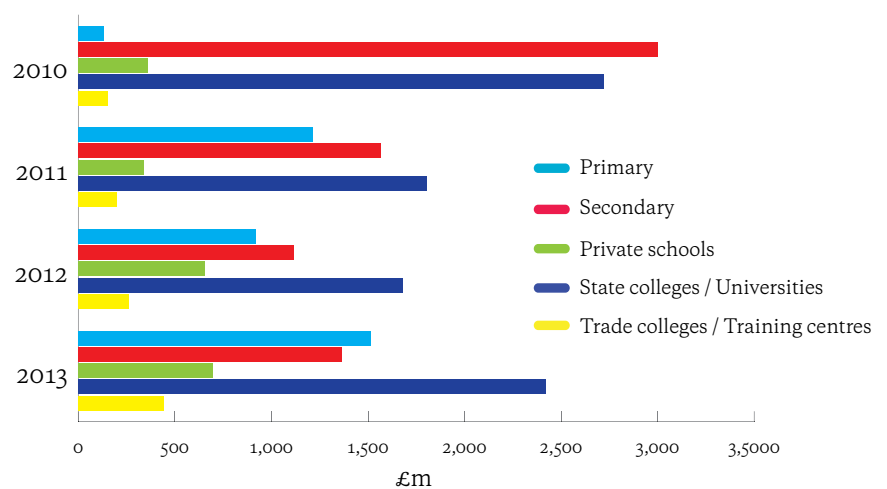
This growth was primarily driven by work awarded in the HE and FE sectors, which remain the area of highest spending in education, having overtaken secondary schools in 2011. Contract awards across universities and state colleges, including training colleges, was £0.9bn greater in 2013 than in 2012, a rise of 47% (fig 1).

This was closely followed by growth in the primary sector, which saw £1.5bn of work awarded in 2013 compared with £0.9bn in 2012. This was a 64% increase, making primary the fastest growing sector. The pace of recovery in the sector means it now exceeds its 2010 level, when it was worth £1.3bn.

In 2013, primary also marginally overtook the secondary market in terms of spend, which can be attributed partly to the political drive to increase primary school places and partly to the shorter lead-in time for primary projects, which tend to take less time to plan than secondary schools so will benefit from increased spending more quickly. However, the secondary market also improved between 2012 and 2013, driven in part by the improving pace of the Priority Schools Building Programme, which includes both primary and secondary schools. The sector grew 18%, from £1.1bn in 2012 to £1.4bn in 2013.

**The HE and FE sectors remain the area of highest spending in education. Contract awards across universities and state colleges, including training colleges, was £0.9bn greater in 2013 than in 2012, a rise of 47%**

[1] VALUE OF CONTRACTS AWARDED BY SECTOR, 2010-13



	Primary (£)	Secondary (£)	Private schools (£)	State colleges / Universities (£)	Trade colleges / Training centres (£)
2010	130,581,450	3,003,328,760	360,152,550	2,720,276,924	150,756,937
2011	1,214,493,927	1,565,750,000	338,193,250	1,807,015,137	197,057,000
2012	917,745,611	1,116,579,347	656,000,828	1,681,592,500	259,165,801
2013	1,515,844,020	1,363,793,266	695,311,500	2,422,431,267	442,405,000

Source: Barbour ABI

### 3.1 REGIONAL SCHOOLS SPENDING TRENDS

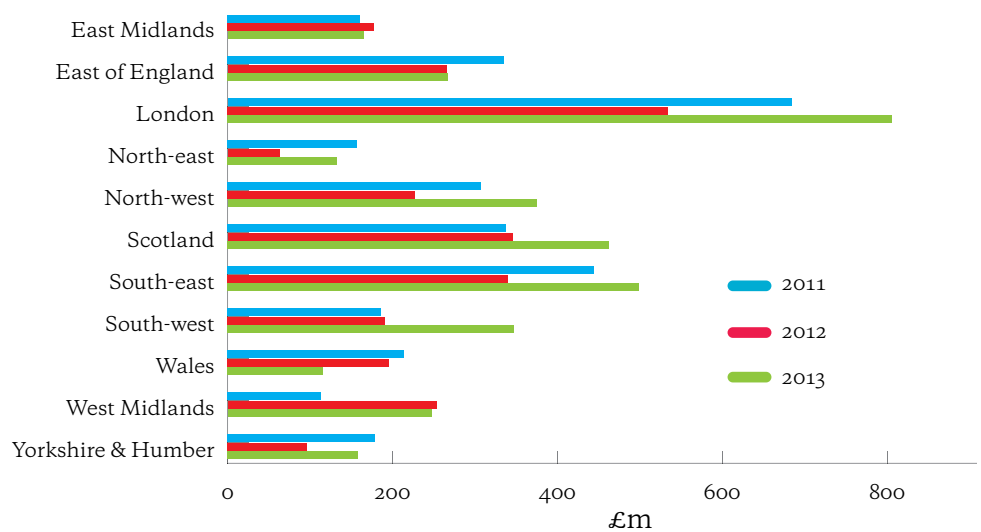
In the schools sector, recovery is apparent in the majority of regions. The London, South-east, North-east, North-west, Scotland, South-west, and Yorkshire & Humber regions all experienced growth in the combined total of work awarded across primary, secondary and private schools, with the East of England broadly flat. The only markets to experience a drop in schools work awarded were the East Midlands and West Midlands.

Regionally, the schools market continued to be dominated by London and the South-east, a trend which has been apparent for the past four years. The total value of contracts awarded on primary, secondary and private schools in London was £806m in 2013, a 51% leap on 2012 levels. In the South-east, the total work awarded was £498m, representing a 47% rise. Scotland was the third biggest region by value, with £462m of contracts awarded in 2013 - a rise of 13% on 2012 levels.

However, the fastest growing region for schools work was the North-east, which saw work awarded increase by 113% to £132m in 2013, compared with £63m in 2012. This was followed by the South-west, with an increase of 83% to £347m of work awarded in 2013.

**The total value of contracts awarded on primary, secondary and private schools in London was £806m in 2013, a 51% leap on 2012 levels. In the South-east, the total work awarded was £498m, representing a 47% rise**

[2] TOTAL VALUE OF SCHOOLS CONTRACTS AWARDED BY REGION, 2011-2013



	2011	2012	2013
East Midlands	160,441,000	177,874,500	164,746,250
East of England	335,005,500	265,459,850	266,859,750
London	683,969,427	534,162,904	806,050,270
North-east	156,700,000	62,946,000	132,996,815
North-west	307,341,250	227,329,000	374,704,250
Scotland	337,682,500	345,552,828	462,772,500
South-east	444,633,000	340,566,454	498,636,351
South-west	186,346,000	190,552,750	347,574,600
Wales	214,151,500	195,750,000	115,442,500
West Midlands	113,691,500	253,478,500	247,368,000
Yorkshire & Humber	178,475,500	96,653,000	157,797,500
Total	3,118,437,177	2,690,325,786	3,574,948,786

Source: Barbour ABI

### 3.2 RECENT SPENDING TRENDS IN HEFE

The HE and FE sectors overtook secondary schools as the greatest area of spending on construction work in education in 2011. These sectors remained the area of largest spend 2012 and 2013, due to a combination of the cuts to school building spend in the recession and the continued pressure on universities to upgrade their estates.

This pressure is partly a result of the amount of work necessary to upgrade existing buildings, particularly the large proportion of the estate dating from the 1960s - an era of construction associated with problems regarding heating, ventilation and panel cladding systems, problems compounded by a historic lack of maintenance. The Association of University Estates Directors (AUDE) said in 2008 that a “conservative estimate” of the cost of replacing the 1960s university buildings in England was £11bn.

The pressure is also driven by competition for research funding by investing in facilities, and competition to attract students, particularly given changes to the tuition fee environment. In 2013 a survey by AUDE found that students ranked university estates a close second to courses when selecting their university.

Spending on capital projects in HEFE declined between 2009 and 2011, with universities hit by cuts to government funding for capital spending. However,

with institutions proving resourceful in attracting private sector funding, the decline levelled out in 2012, with £1.9bn being spent compared with £2.0bn in 2011, according to data by Barbour ABI. In 2013, the market experienced a sharp upturn, with £2.9bn of work being awarded.

The Association of University Estates Directors said in 2008 that a “conservative estimate” of the cost of replacing the 1960s university buildings in England was £11bn

### 3.3 HIGHEST SPENDING HEFE CLIENTS IN 2013

See figure 3, below.

[3] TOP 15 UNIVERSITY AND COLLEGE CLIENTS BY VALUE OF PROJECTS ON WHICH CONTRACTORS WERE APPOINTED (2013)

Ranking	Company	Number of projects	Value (£) of schemes
1	Newcastle University	2	200,100,000
2	City of Glasgow College	2	237,682,500
3	Imperial College London	5	107,040,000
4	Department for Education	11	90,700,000
5	Birmingham City University	1	60,000,000
6	University of Sheffield	5	57,861,000
7	Sheffield Hallam University	5	53,200,000
8	North Hertfordshire College	2	51,500,000
9	University of Nottingham	5	48,471,000
10	Cardiff and Vale College	1	45,000,000
11	University of Bristol	7	42,400,000
12	University of Leicester	1	42,000,000
13	University of Exeter	3	41,000,000
14	University of Highlands and Islands	1	41,000,000
15	Newcastle College	4	40,200,000

Source: Barbour ABI

## 4/ FUNDING FOR EDUCATION BUILDING WORK 2014-2015 AND BEYOND

### 4.1 FUNDING FOR SCHOOLS

#### 4.1.1 DIRECT CAPITAL FUNDING BREAKDOWNS FOR ENGLAND

The amount of capital funding from the Department for Education for 2014-15 was set at £4.6bn in the 2013 spending round, a marginal increase from the £4.5bn earmarked for the period in 2012. The 2013 spending round also set aside an indicative amount of £4.6bn for 2015-16.

The direct funding from the government for 2014-15 includes a combination of elements of the Priority Schools Building Programme (PSBP) - the government's main programme for the renewal of primary and secondary schools, see section 6 - and the programmes below:

- £1.6bn of basic need funding for the period 2013-15 allocated to local authorities to provide additional school places where needed in their area
- £820m of targeted basic need funding announced in July 2013, to fund an additional 74,000 school places in 45 new schools and 333 expanding schools, over a two-year period
- £200m devolved formula capital for schools for 2014-15 to address priority needs on building work or ICT
- £1.2bn for maintenance during 2014-15 of academies, non-maintained specialist schools, sixth-form colleges, independent specialist providers, local authority schools and voluntary aided schools. The funding includes a dedicated £442m maintenance fund for academies (the Academies Capital Maintenance Fund, or ACFM)
- Around £80m allocated through the Demographic Capital Growth Fund to support the creation of extra 16-19 year old places between 2013 and 2015.

The government has said it will make a £21bn investment in the school estate in the next parliament, if elected. This includes funding earmarked for the PSBP.

#### 4.1.2 PF2 FUNDING

The PSBP will include £700m of capital work funded through PF2, the government's revamped form of PFI, by 2017. The government will only start paying towards the schools as they are occupied from 2014-15 onwards.

#### 4.1.3 FUNDING SETTLEMENTS FOR SCHOOLS IN SCOTLAND AND WALES 2014-15 AND BEYOND

School building work in Scotland and Wales is funded separately to that in England. Scotland is part way through a PPP school building scheme worth in the region of £1.25bn, which is due to run until March 2018, covering 67 schools. The programme is supported by around £800m of funding from the Scottish government.

In 2014 the Welsh government officially launched the first wave of its delayed £1.4bn 21st Century Schools Programme, first unveiled in 2011. The first wave is due to rebuild or refurbish 150 schools and colleges over the next five years. The wave is supported by £700m of funding from the Welsh government, which must be matched by the education stakeholders. The first wave was originally timetabled to be delivered over seven years.

### 4.2 FUNDING FOR HEFE BUILDING WORK 2014-15 AND BEYOND

The growth trend in HEFE is expected to continue over the foreseeable future, driven by growth in the universities sector, with private financing becoming more readily available and universities accepting the need to continue to invest to attract students.

The Russell Group of universities, which includes 24 of the UK's top rated universities, are expected to spend over £9bn on capital projects between 2014 and 2016-17, according to a report published on their behalf by consultant Biggar Economics in May 2014. This spending will involve 67

significant projects including seven "major developments", 17 research facilities, and 12 medical research facilities.

#### 4.2.1 HEFCE FUNDING

The Higher Education Funding Council for England (HEFCE) distributes a relatively small amount of capital grant each year to universities and directly funded colleges, which covers both construction and IT projects. For 2014-15, it will allocate £440m, and it has already provided indicative allocations to institutions. This represents a small increase on the two previous years, where the amount awarded was in the region of £300m per year.

The body has also stated that its 2015-16 allocations, which will be made in 2015, will be supplemented by a £200m fund for science and engineering capital for teaching. It is intended that this fund will be doubled by matched funding from institutions.

#### 4.2.2 PUBLIC SECTOR FUNDING IN FE

The government is making £550m of direct capital funding available for FE colleges through the College Capital Investment fund between 2013-15. As of March 2014, the government had committed around £471m of this funding, to projects which will enable schemes worth £920m to go ahead as a result of matched funding from colleges. The most recent round, announced in March, involved £113.8m of government grants allocated to 22 colleges.

## 5/MARKET OPPORTUNITIES AND CHALLENGES BY SCHOOL TYPE

### 5.1 PRIMARY

The predicted shortage of primary school places in England means that the recent trend for growth that saw spending on primary schools rise from £0.9bn to £1.5bn in 2013 is set to continue for the foreseeable future, with the delivery of extra places a political imperative.

Primary schools account for 139 of the 261 schools included in the first wave of the Priority School Building Programme (PSBP), the procurement of which has either been carried out through OJEU (for schools funded by PF2) or through the Education Funding Agency's (EFA's) contractor framework, in the case of capital funded schools. The current government's announcement that future PSBP work will be capital funded means that primary schools funded through the programme are likely to be procured through this framework, as part of batches with secondary schools.

However, a significant amount of primary school work is also set to be procured through a new £5bn regional schools framework currently being procured by the EFA. The framework will be used for the EFA's capital programmes, including free schools, university technical colleges (UTCs), academies and basic need and other programmes, which, given that primary is the dominant recipient of basic need funding, makes it likely to be a major procurement route for the sector. This is particularly the case given that the value of project awarded through the framework is expected to typically range from £3m to £5m, although the EFA has said it could be used for schemes from £200,000 to £10m.

The framework, which will include six regional lots, is currently at shortlist stage, with appointments expected imminently. The framework is due to begin operating in July 2014. Thirty-seven contractors have been shortlisted.

The lots are:

- North-east, worth £500m, seven contractors expected to be appointed

- East, £750m, seven contractors expected to be appointed

- London and South-east, £1.5bn, eight contractors expected to be appointed

- South-west, £500m, seven contractors expected to be appointed

- West Midlands, £875m, seven contractors expected to be appointed

- North-west, £875m, seven contractors expected to be appointed.

The framework will also be made available to bodies such as local authorities, academy trusts and individual schools, which have traditionally carried out their own procurement. Although work could still be carried out through individual procurement or local frameworks, this is likely to reduce the amount of work available through these routes.

### 5.2 SECONDARY

The main new-build programme for secondary schools remains the PSBP, with secondaries making up 104 of the 261 schools included in the first wave.

The bulk of this programme - the capital funded element - has been procured through the EFA's contractor framework, with PF2 schools procured through OJEU.

Firms were appointed to the EFA's current contractor framework in November 2013, with the arrangement replacing the previous version. The framework is worth £4bn and is split into two lots, containing the following contractors:

- North: Balfour Beatty, BAM, Bowmer & Kirkland, Carillion, Galliford Try, Kier, Sir Robert McAlpine, Wates, Thomas Vale.

- South: Balfour Beatty, BAM, Bowmer & Kirkland, Carillion, Galliford Try, Kier, Sir Robert McAlpine, Wates, Willmott Dixon.

The fact that the government has said the next wave of Priority Schools would be capital funded makes it likely that the EFA contractor framework will be used.

There are also significant opportunities in secondary school work in free schools.

The fact that the government has said the next wave of Priority Schools would be capital funded makes it likely that the EFA contractor framework will be used

The majority of this work is also currently being procured through the EFA framework, although schools may procure outside of it, including by using other frameworks.

### 5.3 FREE SCHOOLS

By September 2013, 174 free schools had opened since the programme began in 2010. A further 116 free schools have been approved to open from 2014 onwards. Around 105 of these are working towards a September 2014 opening. The next round of approvals, for schools to be opened from 2015 onwards, is expected in July, with around 100 schools expected to be approved.

By March 2014, an estimated £743m in capital costs had been spent on free schools, according to a National Audit Office report published in December 2013. A further £770m is forecast to be spent in the financial year 2014-15.

The 2013 Spending Round provided capital funds for up to 180 Free Schools to open in each of 2015/16 and 2016/17. Labour is expected to honour commitments to schools which have not been opened but where funding has been allocated.

### 5.4 UTCs AND STUDIO SCHOOLS

The 2013 spending round provided capital funds for 20 new studio schools and 20 UTCs to open in each of 2015/16 and 2016/17. The EFA has said its forthcoming regional framework could be used for UTC work.

## 6/IN DETAIL: PRIORITY SCHOOLS BUILDING PROGRAMME UPDATE

### 6.1 EXISTING SCOPE AND FUNDING

The existing Priority Schools Building Programme (PSBP) includes 261 primary and secondary schools, requiring new build or substantial remodelling. Building work on all of these schools is due to be completed by the end of 2017. Around £1.7bn of the work, covering 215 schools, is being funded by direct capital funding, with the remaining £700m, covering 46 schools, funded by PF2 - the government's revamped form of PFI.

This is a substantial shift from the balance of funding originally envisaged under the programme. When the PSBP was originally announced, it was intended to be funded entirely through PF2. The government then said that PF2 would be used to fund £1.75bn of construction work - on 219 of the 261 schools in the programme - with £400m of capital funding made available to fund 42 schools. A further £1.3bn of capital funding was made available in June 2013, leaving £700m funded by PF2.

Schools in both the capital funded and PF2 elements of the programme have been packaged into geographic batches.

As of May 2014, of the 261 schools in the current programme, 28 were under construction and one, Whitmore Park in Coventry, was open.

### 6.2 DIRECTLY FUNDED SCHOOLS – PROCUREMENT TO DATE

Nineteen capital-funded batches have been procured using the Education Funding Agency's (EFA's) contractors framework. Bids were invited from the framework contractors, with two contractors shortlisted for each batch before a winner was selected. The firms that have been appointed to capital funded batches so far are:

■ **Kier - four batches totalling £197m**

South: £30m

East 2: £60m

North-east 2: £63m

Nottinghamshire: £44m

Around £1.7bn of the work, covering 215 schools, is being funded by direct capital funding, with the remaining £700m, covering 46 schools, funded by PF2 - the government's revamped form of PFI. This is a substantial shift from the balance of funding originally envisaged under the programme

■ **Wates - three batches, £108m**

Midlands 1: £38m

East: £33m

North-west 4: £37m

■ **Bam Construction - two batches, £57m**

London: £29m (batch originally worth £75m but five schools worth £46m were taken back for reprocurement by EFA)

Midlands 2: £28m

■ **Interserve - two batches totalling £87m**

North-west 3: £48m

Midlands 3: £39m

■ **Bowmer & Kirkland - two batches, £64m**

Derby: £28m

East Midlands: £36m

■ **Sir Robert McAlpine - one batch, £57m**

North-east 1: £57m

■ **Carillion - one batch, £47m**

North-west 1: £47m

■ **Willmott Dixon - one batch, £21m**

North-west 2: £21m

Three batches - London 2 (formed of the five schools taken back from the first London batch by the EFA), Brent, and Barking, Dagenham and Newham - are currently being bid by contractors on the EFA framework.

A further 11 capital-funded batches are expected to come to market to the framework contractors this year, which would cover all of the remaining schools included in the original PSBP list that have not so far been procured.

The expected batches, together with approximate expected values, are:

Camden	£40m
Lambeth	£38m
Waltham Forest	£50m
Richmond and Surrey	£32m
Kent east	£35m
Kent west	£25m
Hillingdon	£60m
Harrow	£39m
Devon	£41m
South 2	£45m
Isle of Wight	£52m



### 6.3 PF2 SCHOOLS – PROCUREMENT TO DATE

Schools procured under PF2 are tendered on OJEU, with the winning bidder appointed to design, build, finance and operate the schools over a period of approximately 25 years. The EFA is procuring an organisation, known as an aggregator, to provide debt funding for all of the privately financed school batches, rather than each batch having to secure its own funding. The aggregator is expected to be announced in summer 2014.

Five batches of schools are being funded using PF2. Of these, contractors have been appointed to two, two are at shortlist stage and the fifth is out to tender.

The current status of the batches is:

■ **Hertfordshire, Luton and Reading - £150m, seven schools**

Preferred bidder: Interserve and Kajima  
Shortlisted bidders: Wates, Morgan Sindall

■ **North-east - £120m, 12 schools**

Preferred bidder: Miller  
Shortlisted bidders: Laing O'Rourke, Sir Robert McAlpine

■ **North-west - £93m, 12 schools**

Preferred bidder: expected June/July 2014  
Shortlisted bidders: Morgan Sindall, Laing O'Rourke, Vinci

■ **Yorkshire - £120m, seven schools**

Preferred bidder: expected June/July 2014  
Shortlisted bidders: Bam, Morgan Sindall, Laing O'Rourke

■ **Midlands - £150m, eight schools**

Bids invited in April 2014  
Shortlisted bidders: Bam, Carillion/Equitix, Interserve/Kajima  
Preferred bidder: expected November/December 2014

### 6.4 FUTURE PSBP WORK

The government announced in May 2014 that it would commit £2bn in additional capital funding to extend the PSBP over the next spending review period, from 2015-21. Although a future government will not be bound by this commitment, it is expected that any commitments made to individual schools by the time a new government is formed would be honoured. Politically, it seems unlikely that a future government

The government announced in May 2014 that it would commit £2bn in additional capital funding to extend the Priority Schools Building Programme over the next spending review period, from 2015-21

would reduce the amount of funding available.

The Department for Education (DFE) has not yet opened the application process for schools for the next phase of the PSBP, but is expected to do so in June 2014.

This next phase will be informed by data collected through the DfE's school condition survey. This was originally scheduled to be completed in October 2013, but is now expected this summer. The survey is being carried out by consultants Davis Langdon, EC Harris and Capita.

Schools minister David Laws has said the new funding will be focused on rebuilding both whole school estates and individual buildings within estates.

## 7/METHODOLOGY

This update was published in May 2014 and is based on market intelligence sourced by Building alongside data provided by research provider Barbour ABI.

The top universities and colleges clients list ranks clients in England, Scotland

and Wales by value of project to which a contractor was appointed in 2013, according to data by Barbour ABI. Data for Northern Ireland is not available.

The historical regional trends data given in this update, based on contract awards, may

show slight differences from that published in the original Education 2013-15 white paper. This is because Barbour revises its data in the light of more recent intelligence, for example should a project previously awarded be cancelled or placed on hold.

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		k. Priority Schools Building Programme projects	

## 2/EXECUTIVE SUMMARY

The education building sector of the UK construction market - in particular in England - is undergoing significant change as a result of the government's cuts to public spending. Capital funding cuts across both the schools and higher and further education (HEFE) sectors have led the sector as a whole to decline in value from around £9.6bn in 2009 to £6.5bn in 2011, according to data from Barbour ABI. The schools sector has been the worst hit by spending cuts, which have included the cancellation of the £55bn Building Schools for the Future (BSF) programme in 2010. In this sector, alongside this reduction in value, procurement routes, design standards and working practices have been overhauled by government over the last 18 months in an attempt to meet its target of saving 30% from the cost of school buildings.

Despite the reduction in spending, however, there remains a clear and pressing need for investment in both the schools and HEFE estates. Two-thirds of secondary schools received no investment under BSF before it was stopped. The government's replacement initiative, the £2.4bn Priority Schools Building Programme (PSBP), which was announced in July 2011 with the aim of improving the buildings of schools in the very worst condition, attracted almost three times as many applications as it could afford to fund. In a survey of local authorities for this white paper, 23% rated the condition of the schools estate in their area as extremely poor or very poor, with more than two-thirds of schools in need of refurbishment or renewal. A further 44% rated their estate as "unsatisfactory", with around half the schools in their area in need of improvement.

In addition to the problem of poor building condition, the country is faced with a significant shortage of pupil places, especially at primary level. An Office of Government Commerce report published in 2010 said that 60,000 extra primary school places were needed urgently to cope with rising pupil numbers, particularly in areas of high population growth.

- The government's £2.4bn Priority Schools Building Programme, announced in July 2011, attracted almost three times as many applications from schools as it could afford to fund, in an indication of the scale of work deemed necessary by schools and local authorities to improve the condition of their primary and secondary estates.

- During 2011, the higher and further education market overtook secondary schools as the area of biggest spending on capital education works in the UK.

- The government currently estimates that the condition of 34% of the country's further education estate is "poor or unacceptable". The cancellation of the Building Colleges of the Future programme in March 2009 left almost half of the estate without investment

- In a survey of almost 200 construction professionals for this white paper, 92% said that the education sector would be "extremely important" or "important" to their business over the next four years.

- The past 18 months has seen a growing acceptance of standardised design among local authorities and schools. Forty-six per cent of local authorities surveyed said they would consider buying pre-designed schools, compared with 18% in 2011.

- Twenty-three per cent of construction firms have increased the size of their education division over the past year, while 36% have kept it to the same scale, highlighting construction firms' perception of the sector as business-critical despite tough market conditions.

In a survey of local authorities for this white paper, 23% rated the condition of the schools estate in their area as extremely poor or very poor, with more than two-thirds of schools in need of refurbishment or renewal

### Wide-ranging overhaul

In an attempt to balance this clear need with its policy of reducing the amount spent on school building, the government in 2010 embarked on a wide-ranging overhaul of the processes and standards surrounding building work in the sector. This process began with the commissioning of a review into school building programmes by Sebastian James, group operations director at electronics retail company DSG International. When the James review was published in April 2011, it recommended a series of deep-rooted changes to the sector, including greatly reduced procurement times and a heavy use of standardised design in order to lower costs.

The government, while remaining ambivalent to some aspects of the report, strongly endorsed these two principles. Both are central to the procurement of the PSBP. Under this initiative, bidding processes are being reduced to around 11-12 months. Bidders on the PFI element of the programme, expected to come to market from spring 2013, will also be expected to use standardised designs and processes in whole or in part to meet a set of generic, standardised "output specifications" for school buildings issued by the government in October 2012. These include typical gross area reductions of around 15% for secondary schools and 5% for primary schools compared

with previous standards. They also specify that schools should be based on “simple, rectilinear forms”. The Education Funding Agency, the governmental delivery body now responsible for the school building programme, has also issued “baseline” sketch designs which indicate potential layouts that meet the criteria, although contractors are able to deviate from these.

Work on the PSBP has been slower than anticipated in coming to market, with the first contracts tendered in November as opposed to spring 2012 as originally expected. In addition, the PFI element of the programme - originally intended to be the funding route for the whole initiative until the Department for Education announced £400m of direct funding to fast-track 42 of the 261 schemes - is not expected to begin until spring this year. Delays have been caused partly by a wider government review of PFI which was published in December. However, the launch of the directly funded schemes, combined with the conclusion of the PFI review, should herald a significant uplift in opportunities in new-build schools work from 2013 onwards - albeit nothing approaching the scale of BSF.

#### Higher and further education

In the HEFE sector, too, there is a clear ongoing need for development work. The higher education (HE) estate is still suffering from a lack of investment throughout the 1980s and 90s. Although the amount spent by universities on their estates increased substantially during the 2000s, many universities are still in possession of 1960s and 70s buildings that are no longer fit for purpose. In addition, the introduction of variable, higher levels of tuition fees means that universities are facing more competition than ever to attract students, and almost universally regard the quality of their estates as an important factor in their appeal. A third major factor driving investment in university estates is sustainability, due to both government pressure to achieve ambitious carbon reduction targets across the sector as a whole, and an increasing awareness among clients of the benefits that sustainable development can bring to the whole-life

running costs of an estate.

The further education (FE) estate is suffering from under-investment to an even greater extent than its HE counterpart. The cancellation of the government’s Building Colleges for the Future programme in March 2009 left almost half of England’s FE estate without investment, even though much of it had been judged “no longer fit for modern educational purposes”, according to the government’s Public Accounts Committee. The government currently estimates that 34% of the country’s FE estate is “poor or unacceptable”.

Across the HEFE sector, £2.5bn of work was awarded in 2011; a drop from £3.2bn in 2010 and £4bn in 2009. Reductions have been caused partly by cuts to central government funding for building programmes, including that distributed through the Higher Education Funding Council for England, which is used in addition to private investment to fund estate improvements. In the case of the HE sector, a slowdown has also been caused by recent uncertainty around income levels from tuition fees, which universities are also using to fund development work. However, data-based research for this white paper suggests that the HEFE sector has levelled out in 2012: work awarded in the first three quarters totalled £1.84bn, compared with £1.82bn at the same point in 2011. A further boost was provided by the government’s autumn statement in December 2012, which announced £270m of extra capital funding for FE colleges. This will increase government’s planned spending in the sector between 2013 and 2015 by almost 50%.

#### A vital sector

The underlying need for development work in education, combined with signs that opportunities for work will increase from 2013 onwards, mean that, despite the reductions to overall market size, the sector as a whole is still considered extremely important to the business strategies of UK construction firms. In a survey of almost 200 professionals from construction firms for this white paper, 44% said the sector was “extremely important

Data-based research for this HEFE sector has levelled out in 2012: work awarded in the first three quarters totalled £1.84bn, compared with £1.82bn at the same point in 2011

- one of our biggest areas of focus”, with a further 48% saying it was “important”.

This is a slight increase on the degree of importance attached to the sector 18 months ago in Building’s first education white paper: then, a total of 87% of respondents described the sector as important or very important. This suggests that an already competitive market has become even more so as prospects have shown signs of improvement. The main area of focus for firms who responded to the survey was the PSBP, although there was marginal difference in the levels of importance attached to various school and HEFE building programmes. This implies that although the PSBP is likely to attract the most interest, the market will remain competitive across the board.

There is also evidence of encouraging progress made by both clients and construction firms towards adapting to the changed environment in school building. There has been a major shift over the last 18 months in schools’ and local authorities’ willingness to accept a greater degree of standardisation in the design of their school buildings. Forty-six per cent of local authorities surveyed for this research said they would consider buying pre-designed schools, compared with 18% who were prepared to consider this in 2011. There was a similar increase among school professionals, with 40% now prepared to consider pre-designed schools compared with 11% in 2011.

Construction firms now, on average, believe that the achievable cost of building both primary and secondary schools is slightly lower than they did 18 months ago. In terms of secondary schools, 48%

believe a cost of below £1500/m<sup>2</sup> (excluding landscaping, abnormals, furniture, ICT, overhead and profits) is possible, compared with 40% in 2011. The majority of firms believed that adopting greater levels of standardisation would be the most effective way of reducing costs still further.

Despite this, however, there remains marked scepticism over the achievability of the government's overall aim of saving 30% from the cost of school building compared with the BSF era: under half of all construction firms who responded (45%) believed the savings were achievable.

In addition, despite recent progress on initiatives such as the PSBP, firms, local authorities and schools remain unhappy about the government's management of current school building programmes. Almost 80% of construction firms said they were either dissatisfied or very dissatisfied, with the biggest area of complaint being a lack of clarity over timescales for work. Among schools and local authorities, there was a high level of concern over the impact of reduced opportunities for them to input into the design and construction process, with 83% of school professionals and 71% of local authority professionals marking this out as an area of concern.

This report provides an in-depth study of the current state of education building markets, including recent spending trends and the outlook to 2015. A detailed survey of local authorities' and schools' priorities in school buildings and attitudes towards design offer a guide to potential areas of opportunity, as do breakdowns of likely pupil place shortfalls in every local authority in England, updated since Building's 2011 white paper and extended until 2015-16. A survey of construction professionals' business strategies and their assessment of key cost questions provides an in-depth insight into how firms are responding to the current challenges in education building, while exclusive rankings of the most active firms in the education sector offer insight into the companies currently capitalising on opportunities in a market that remains a sought-after, but highly competitive, source of work.

## 3/THE CURRENT STATE OF THE SCHOOLS MARKET

### 3.1 BACKGROUND: CHANGES TO THE SCHOOL BUILDING ENVIRONMENT UNDER THE CURRENT GOVERNMENT

During the period 1997 to 2010, the amount spent on school building work by the government rose dramatically. Capital spending by the Department for Education, responsible for funding schools in England, rose from £600m in 1996-97 to a peak of £7.6bn in 2010-11. There were more than 20 funding streams for capital work, with the largest sums of money spent through the £55bn Building Schools for the Future (BSF) initiative, which was launched in 2003 with the aim of rebuilding or refurbishing all 3,500 secondary schools in England by 2020.

However, when the Conservative and Liberal Democrat coalition took office in May 2010, its immediate priority was to make drastic cuts to public spending in order to reduce the financial deficit that was facing the UK as a result of the international credit crisis and recession. One of the first targets of this spending reduction was capital spending on schools. In July 2010, education secretary Michael Gove froze all BSF projects that were not at financial close, with the exception of those in a repeat wave of investment that had been approved prior to 1 January 2010. This resulted in 735 projects being stopped entirely and a further 151 placed under review. Thirty-three of those projects under review were sample schemes that were restarted two months later, along with 44 academy projects. The remaining academy projects were required to cut costs by up to 40% and were then approved in February 2011. The Primary Capital Programme, which had been intended to spend £7bn renewing half of England's 17,000 primary schools by 2023, was also stopped. The Comprehensive Spending Review published in October 2010 detailed further deep cuts to education capital spending, showing a fall of 60% in funding from the government over the spending review period to 2014-15.

At the same time as cancelling BSF, Gove announced a wide-ranging review of

the school building programme and future procurement, chaired by Sebastian James, the group operations director of electronics retail company DSG International. This review was aimed at analysing problems with the current system and finding a way of procuring schools more cost-effectively and efficiently. It was also to recommend changes to the way capital funding was allocated and targeted.

James published his findings in April 2011. He made 16 recommendations aimed at reducing the cost of school building work and improving its efficiency, saying that it would be possible to cut the overall cost of school building programmes by 30% if changes were made to create a more streamlined, efficient process. His key recommendations included:

- Allocation of capital investment should focus on the need for high-quality school places and the condition of facilities
- A powerful central delivery body should be established to procure and manage all projects above a certain threshold
- A suite of standardised drawings and specifications should be developed that can easily be applied across a wide range of educational facilities
- School premises regulations should be simplified and the bureaucracy around BREEAM assessments reduced
- There should be a central database of building condition, with independent surveys carried out on a rolling 20% sample of the school estate each year
- Capital funds should be apportioned as a single budget for each local area. A local process, led by the local authority, should develop a prioritisation plan for these funds that then goes through a light-touch appraisal by a central body. A plan of work should then be developed that would allow national-scale benefits to be identified.

- The central body should put in place a small number of new national procurement contracts.

The government's response to James' recommendations was released in July 2011. It positioned itself as being positive overall towards the recommendations, although in reality it then moved to adopt some of them much more quickly than others, and some, such as the idea of local authorities distributing funds from central government to various bodies such as academy trusts and schools in their area, have not been followed through. The major changes that have been enacted, or are in the process of being enacted, since the government's response are as follows.

#### 3.1.1 THE EDUCATION FUNDING AGENCY

In April 2012 the government replaced former delivery body Partnerships for Schools (PfS) with a new Education Funding Agency (EFA). This also included the functions of the Young People's Learning Agency (YPLA), which was previously responsible for funding 16-19 education and the creation of academies. The EFA manages both revenue and capital funding for education. The principle difference between it and PfS is that it reports directly to the DfE, rather than its own board, meaning that the government has more direct control over its activities.

The chief executive of the EFA is Peter Lauener, the former chief executive of the YPLA. In February 2012, Mike Green, who formerly ran the property division at pharmaceutical retailer Alliance Boots under the title head of storecare, was appointed director of capital.

The EFA is now responsible for channelling all of the government's capital funding for schools. It is directly running the procurement of the Priority Schools Building Programme (PSBP, see section 4) and has responsibility for managing the existing contractors' framework. It will also be responsible for its reprocurement.

### 3.1.2 ALLOCATION OF FUNDING

The government endorsed the principle of allocating funding according to greatest need for pupil places and worst building condition. It used building condition as the method of prioritising schools for inclusion in the PSBP, with applications having to be supported by a building condition survey and data supplied on work needed under three categories: Priority 1 (urgent work), Priority 2 (work needed within two years) and Priority 3 (work needed within three to five years).

### 3.1.3 BUILDING CONDITION SURVEY

The government accepted James' recommendation that a national school building condition survey be carried out, which will be used to inform future capital spending allocations. The initiative, known as the Property Data Survey Programme, is being managed by the EFA, and will cover up to 23,000 education establishments, including local authority maintained schools and academies. Three consultants - Davis Langdon (part of AECOM), Capita Symonds and EC Harris - were appointed in March 2012 to carry out the survey on the basis of regional lots, which are listed below.

- North-west: Davis Langdon
- North-east: Capita Symonds
- Yorkshire & the Humber: Capita Symonds
- West Midlands: Davis Langdon
- East Midlands: Davis Langdon
- East of England: EC Harris
- South-west: Capita Symonds
- South-east: EC Harris
- London: EC Harris

The first phase of surveying work started in schools, academies and colleges in June 2012. The final phase is due to finish in late summer or early autumn 2013.

### 3.1.4 STANDARDISED DESIGNS AND SPECIFICATIONS

The EFA, with input from design professionals in the sector, has released an Output Specification detailing design criteria and standards for schools in the PFI

element of the PSBP. It has also issued a set of "baseline designs" - 1:200 floorplans that give indicative layouts that could be used to meet its specifications, although contractors and their design teams are able to propose alternative solutions. These designs and specifications are covered in more detail in section 4. The EFA has explicitly stated that schools built under the PFI element of the PSBP should have standardised elements to increase the efficiency of their construction and lower costs, although this does not have to equate to a fully standardised school.

### 3.1.5 REDUCED PROCUREMENT TIMESCALES

The government trialled reduced procurement processes on Campsmount school in Doncaster, which it used as a pilot for some of James' reforms. This scheme, which opened to pupils in April 2012, was procured in under half the time of previous typical capital-funded projects, with a timeframe of 21 weeks compared with 48. These reforms are now being implemented across other capital-funded projects. In addition, the government's reformed PFI model, PF2, which will be used to procure the bulk of the PSBP, envisages a typical reduced procurement time of one year. More detail on both of these areas of reform is given in section 4.

### 3.1.6 REGULATORY CHANGES AND SUSTAINABILITY

The government has accepted the need to revise regulations and guidance covering school premises. It has already issued a draft replacement for guidance on acoustics, and will publish changes to other Building Bulletins governing schools throughout 2013 and 2014. Some aspects of current standards have already been superseded by requirements under the output specification for the PSBP, most notably area guidelines. The minimum gross area requirements under the Output Specification are on average around 15% smaller than Building Bulletin standards for secondary schools and 5% smaller for primary schools.

The government's position on sustainability measurement has remained

**The Primary Capital Programme was only rolled out nationally in 2009, so had even less of an impact on the existing estate: as of August 2010, just 65 new builds and 128 major refurbishments had been completed**

in doubt for much of the last two years, as officials have considered whether to move away from BREEAM requirements. Under the Priority Schools Output Specification, it is stated that schools should achieve BREEAM "very good" or equivalent - but it is not insisting on BREEAM ratings specifically.

## 3.2 THE NEED FOR CONTINUING INVESTMENT IN SCHOOL BUILDINGS

The cancellation of the BSF programme in June 2010, even taking into account those schools which were told they could continue with projects, left two-thirds of the secondary school estate in England without investment.

The implications of this for building condition are exacerbated by the fact that the method used to prioritise schools for inclusion in BSF did not necessarily mean that those buildings in the worst condition had received funding before the programme was cancelled - investment was prioritised on the level of deprivation in the local area, and the attainment of pupils (the lower the attainment, the higher the level of priority). James said in his review that "there is a poor correlation overall between the condition of schools and the order in which they were refurbished or rebuilt".

The Primary Capital Programme was only rolled out nationally in 2009, so had even less of an impact on the existing estate: as of August 2010, just 65 new builds and 128 major refurbishments had been completed.

Until the EFA's property data survey programme is complete, it is difficult to

ascertain a true picture of the condition of either the primary or secondary school estate as there has not been a central method of collecting data on building condition in place since 2005. However, the high number of applications from schools for the PSBP, which saw 587 schools argue that their condition was so poor that they warranted inclusion, is indicative of the scale of work needed.

In addition, anecdotal evidence from schools, local authorities, parents and industry professionals suggests that large proportions of the estate are in poor repair or are unsuitable for purpose. In a survey of local authorities for this white paper, 23% rated the condition of the schools estate in their area as extremely poor or very poor, with more than two-thirds of schools in need of refurbishment or renewal (figure 1). A further 44% said that around half of the schools in their area were in need of refurbishment or renewal, rating their estate as “unsatisfactory.” Further, James estimated subsequent to his review that the cost of meeting demand for basic repairs and maintenance could reach £22bn.

In addition to the condition of the school estate, another major driver of the need for investment is the shortage of pupil places. Data from the DfE published in 2012 indicated that almost 800,000 additional children aged 11 or under would be in state

**In a survey of local authorities for this white paper, 23% rated the condition of the schools estate in their area as extremely poor or very poor**

education by 2020.

The problem is particularly pressing at primary level: an Office of Government Commerce report prepared in 2010 said that 60,000 extra primary school places were needed urgently to cope with a rising birth rate and a trend for parents affected by the economic downturn to choose state rather than private education. The number of children in English primaries is expected to rise from 3.9 million as of September 2010 to more than 4.5 million in 2018.

Regionally, the problem is inevitably worse in areas of high population growth. The population aged between five and 10 is expected to rise by 12% between 2009 and 2014, including a 16% rise in London.

### 3.3 FUNDING FOR SCHOOL BUILDING WORK 2013-15

#### 3.3.1 DIRECT CAPITAL FUNDING BREAKDOWNS FOR ENGLAND

The government’s last Comprehensive Spending Review, published in October 2010, showed a steady decrease in capital spending allocations to the DfE from a 2010-11 peak of £7.6bn. The allocations announced at that time were:

2010-11	£7.6bn
2011-12	£4.9bn
2012-13	£4.2bn
2013-14	£3.3bn
2014-15	£3.4bn

Since the review’s publication, however, the government has allocated some additional spend and reprofiled some of its existing allocations, meaning that the amounts allocated for 2012-15 are now as follows:

2012-13	£4.5bn
2013-14	£4bn
2014-15	£4.5bn

[source: DfE]

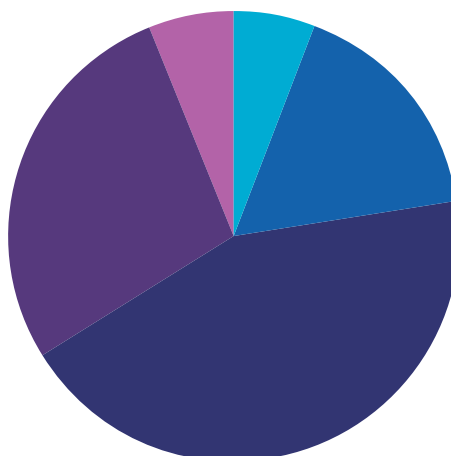
The direct funding from the government for 2012-13 includes:

- £1.4bn allocated to local authorities to address basic needs in their area across any publicly funded schools (which could include academies and free schools, and includes £600m of additional funding announced in the 2011 autumn statement)
- £636m allocated to local authorities for maintenance capital
- £276m of maintenance capital for academies
- £200m devolved formula capital for schools (nursery, primary or secondary, to address priority needs on building work or ICT)
- £107m for 16-19 provision (maintenance, devolved formula capital and basic need funding) and £174m of voluntary aided programme capital to support maintenance in voluntary aided schools.

Directly funded programmes for 2013-14

#### [1] HOW WOULD YOU RATE THE CONDITION OF THE SCHOOL ESTATE IN YOUR LOCAL AUTHORITY AREA?

- Extremely poor - Almost all schools are in poor state of repair and need urgent work 6%
- Very poor - More than two-thirds of schools in need of some refurbishment, some with major work required 17%
- Unsatisfactory - Around half of the schools are in need of refurbishment 44%
- Good - Up to a third of buildings need some refurbishment 28%
- Excellent - No significant refurbishment required 6%





will include elements of the PSBP and a continuation of the above programmes. The latest details on funding allocated for the various programmes is as follows:

#### Priority Schools Building Programme - directly funded schools

Forty-two of the 261 primary and secondary schools to be included in the PSBP are to be directly funded, in an element of the programme worth £400m. The schemes will be grouped in eight batches. Procurement processes are already under way for the first two batches - North-east and Midlands 1 - and the remainder of the batches - London, North-west, South, East, Midlands 2 and North-west 2 - are expected to come to market in January and February 2013. The first three batches to come to market are worth between £136m and £154m, broken down as: North-east £60m-£64m, Midlands £32m-£36m, London £44m-54m. More detail on the expected breakdown of funding between the remaining batches is given in section 4.

#### Basic need

Allocations for basic need funding, which is designed to support the need for extra pupil places, for 2013-14 are expected to be published in January 2013. Lists of local authorities with the greatest shortage of places - a measure used to inform funding allocations - are given in section 9, appendices G-J.

#### Academies Capital Maintenance Fund

The government is aiming to inform academies of their 2013-14 allocations under the Academies Capital Maintenance Fund in April 2013. The final applications deadline is February 2013, with an earlier deadline for academies that converted before September 2012.

#### Sixth Form College (SFC) Building Condition Improvement Fund (BCIF)

The fund is aimed at improving the buildings of the sixth-form colleges judged in the worst condition, and those where pressure on space due to a college's popularity (as opposed to demographic pressures) is greatest. The DfE is expected to announce the total amount of

funding for the BCIF in 2013-14 in January 2013 with individual allocations to colleges announced by the EFA, which will manage the programme, in March. The deadline for applications from sixth-form colleges is 31 January 2013. Colleges will be expected to start projects early in the financial year, with funds to be spent by the end of March 2014.

#### 16-19 Demographic Growth Fund

This funding is to support expansion at sixth-form colleges that is necessary due to population growth or increasing participation. Further announcements on the scope of the programme are expected in early 2013.

#### 3.3.2 PF2 FUNDING

PF2, the government's revamped form of PFI, will be used to fund £1.75bn of schools construction work under the PSBP between 2013 and 2015-16. This is slightly below the £2bn initially announced by the government, which the DfE claims is the result of the original figure being an estimated value. The PFI element will fund 219 of the 261 schools included in the overall programme, which includes primary, secondary and special educational needs (SEN) schools. The government will only start paying towards these schools when the first wave is occupied in 2014-15, meaning the bulk of the money comes in addition to the annual governmental settlements outlined in section 4.1.

#### 3.3.3 OTHER FUNDING METHODS

With reductions to public sector funding, some schools and local authorities have established alternative methods of funding school development. These include raising funds directly from land receipts - a model being used by Liverpool council alongside public sector funding to finance a £169m schools development programme.

Another alternative method is being offered by Cornerstone, a venture set up by Tim Byles, former chief executive of PFS. The venture uses funds from the private sector to buy surplus public sector real estate assets and develop them for community

#### PF2, the government's revamped form of PFI, will be used to fund £1.75bn of schools construction work under the PSBP between 2013 and 2015

purposes, including for use as schools. It operates as a mutual, returning profit to private sector investors and the third sector. The organisation has recently signed its first schools-related deal with Enfield council, securing an agreement (subject to plans being ratified) to deliver a £22m building programme which will expand 11 primary schools, creating 2,400 extra places.

#### 3.3.4 FUNDING SETTLEMENTS FOR SCHOOLS IN SCOTLAND AND WALES 2013-15

School building programmes in Scotland and Wales are financed separately to the DfE capital programmes, which only cover schools in England.

The Scottish government is part way through a £1.25bn PPP school building programme, which was launched in June 2009 and is due to run until March 2018. The programme follows the Non Profit Distributing model developed by the Scottish government as an alternative to standard PFI, and is managed by the Scottish Futures Trust. The programme was originally intended to cover the rebuilding or refurbishment of 55 primary and secondary schools, but in September 2012 the Scottish government announced that an extra 12 schools would be built, taking the total to 67. The additional schools will be funded by an extra £80m brought forward following savings made by the Scottish Futures Trust. The list of the final 30 schools to be included in the programme was announced in September 2012.

The Welsh government is to carry out a £1.4bn school building programme beginning

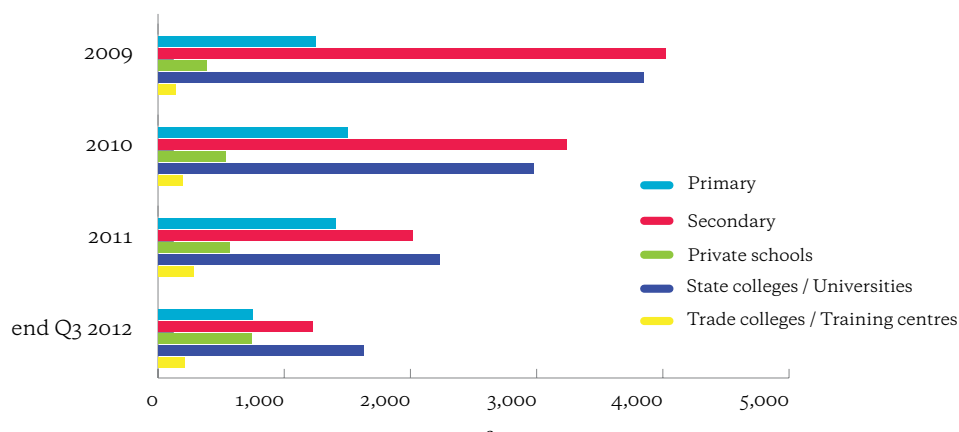
in 2014-15 and running for seven years. The government will provide £700m of capital funding, with local authorities funding the remainder. The programme, called 21st Century Schools, was confirmed in December 2011 after the Welsh assembly had to scale back earlier plans for a £4bn programme due to lack of funds. The investment will follow a Transitional Funding Programme which is currently under way and worth £415m in capital investment from the Welsh government. Initial indications of funding allocations, which are still subject to review, have been provided to all 22 councils to be included in the programme, with Rhondda Cynon Taff council having the highest estimated programme cost at £160m.

### 3.4 RECENT SECTOR AND REGIONAL SPENDING TRENDS

Before spending cuts announced in 2010 began to hit the education sector, secondary schools offered the biggest market for construction work, with £4bn of contracts being awarded in 2009 and £3.2bn in 2010. Unsurprisingly this has been the market most affected by cuts, with the market halving in size between 2009 and 2011, when £2bn of work was awarded. Spending on primary schools has also declined over the period, but by a smaller degree, and as such the gap between spending on primary and secondary schools has narrowed significantly over the period - the difference in value between the two markets in 2010 was £1.7bn, which reduced to £600m in 2011 and £450m by the third quarter (Q3) of 2012 (see figure 2).

Another shift in market dynamics over the last two years has been that the colleges and universities sector in 2011 overtook secondary schools as the area of most work in education, with £2.2bn of work awarded in universities and state colleges compared with £2.0bn in secondary education. This trend has continued into 2012, with spending at the end of Q3 standing at £1.6bn on colleges and universities and £1.2bn on secondary schools. The shift has happened despite the impact of reduced spending on colleges and

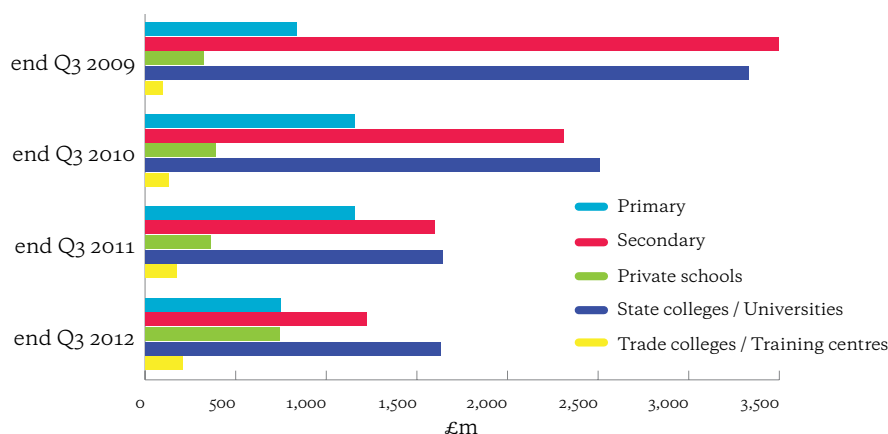
[2] VALUE OF CONTRACTS AWARDED BY SECTOR, 2009-Q3 2012



	Primary (£)	Secondary (£)	Private schools (£)	State colleges / Universities (£)	Trade colleges / Training centres (£)
2009	1,245,875,000	4,021,783,000	380,915,000	3,849,105,000	139,123,780
2010	1,497,945,416	3,236,434,000	534,669,500	2,976,289,500	193,507,708
2011	1,403,938,927	2,020,117,500	569,556,350	2,228,331,028	282,757,000
end Q3 2012	746,895,848	1,220,748,250	740,428,578	1,628,374,500	209,653,500

Source: Barbour ABI

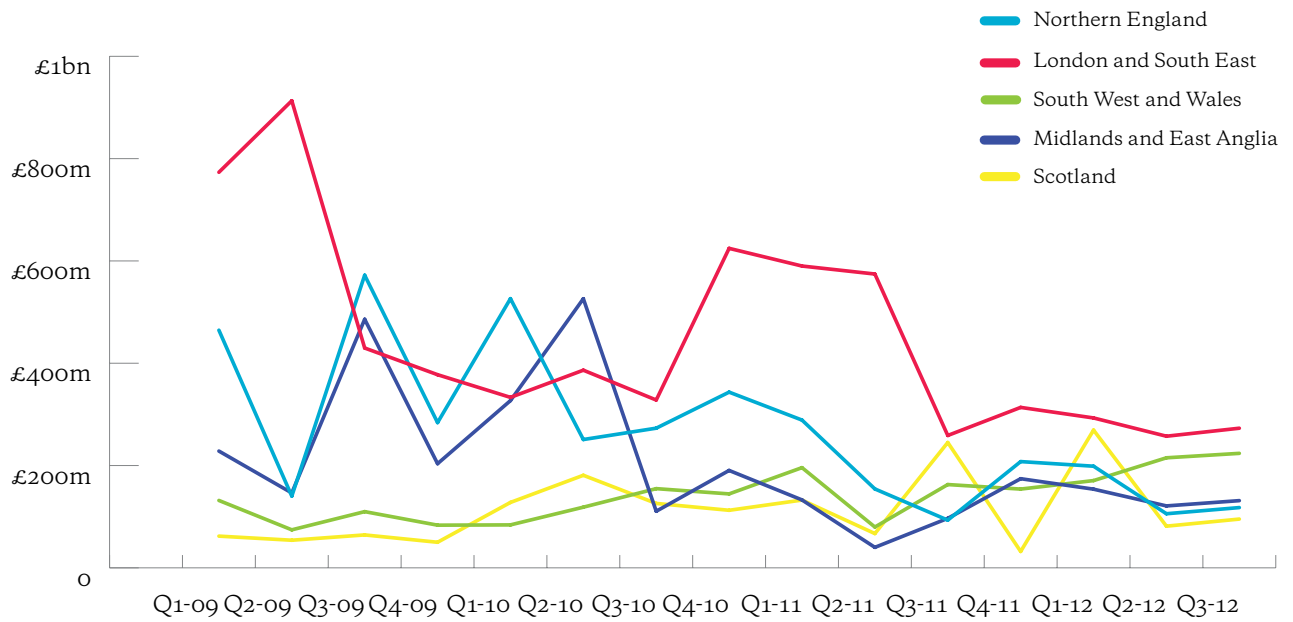
[3] VALUE OF CONTRACTS AWARDED IN FIRST THREE QUARTERS, 2009-12



	Primary (£)	Secondary (£)	Private schools (£)	State colleges / Universities (£)	Trade colleges / Training centres (£)
end Q3 2009	833,635,000	3,495,988,000	320,415,000	3,332,605,000	96,700,000
end Q3 2010	1,155,934,916	2,310,399,000	387,179,500	2,509,022,000	131,507,708
end Q3 2011	1,154,770,427	1,596,767,500	360,505,000	1,642,058,528	174,077,000
end Q3 2012	746,895,848	1,220,748,250	740,428,578	1,628,374,500	209,653,500

Source: Barbour ABI

[4] TOTAL SCHOOLS CONTRACTS AWARDED BY REGION, QUARTERLY BREAKDOWN 2009-Q3 2012



London and South-east		Northern England		Midlands and East Anglia		South-west and Wales		Scotland	
Quarter	Value (£)	Quarter	Value (£)	Quarter	Value (£)	Quarter	Value (£)	Quarter	Value (£)
Q1 2009	773,335,000	Q1 2009	464,585,000	Q1 2009	228,280,000	Q1 2009	131,750,000	Q1 2009	62,000,000
Q2 2009	913,150,000	Q2 2009	140,230,000	Q2 2009	146,400,000	Q2 2009	74,300,000	Q2 2009	53,960,000
Q3 2009	429,760,000	Q3 2009	572,090,000	Q3 2009	485,960,000	Q3 2009	109,888,000	Q3 2009	64,350,000
Q4 2009	377,600,000	Q4 2009	283,910,000	Q4 2009	203,615,000	Q4 2009	83,415,000	Q4 2009	49,995,000
Q1 2010	333,255,000	Q1 2010	526,270,000	Q1 2010	326,900,000	Q1 2010	83,955,000	Q1 2010	127,883,000
Q2 2010	386,400,416	Q2 2010	250,840,000	Q2 2010	526,103,000	Q2 2010	118,580,000	Q2 2010	180,940,000
Q3 2010	328,052,500	Q3 2010	273,020,000	Q3 2010	110,587,500	Q3 2010	154,827,000	Q3 2010	125,900,000
Q4 2010	624,590,500	Q4 2010	343,505,000	Q4 2010	190,400,000	Q4 2010	144,540,000	Q4 2010	112,500,000
Q1 2011	590,028,000	Q1 2011	288,880,000	Q1 2011	132,776,500	Q1 2011	195,877,500	Q1 2011	132,500,000
Q2 2011	574,394,500	Q2 2011	154,227,500	Q2 2011	40,022,500	Q2 2011	79,750,000	Q2 2011	66,972,500
Q3 2011	258,774,427	Q3 2011	93,250,000	Q3 2011	96,712,000	Q3 2011	162,817,500	Q3 2011	245,060,000
Q4 2011	313,648,100	Q4 2011	207,699,250	Q4 2011	174,267,500	Q4 2011	153,955,000	Q4 2011	32,000,000
Q1 2012	293,020,848	Q1 2012	198,684,500	Q1 2012	153,806,000	Q1 2012	170,575,000	Q1 2012	269,282,500
Q2 2012	257,310,600	Q2 2012	105,756,250	Q2 2012	121,050,000	Q2 2012	215,108,750	Q2 2012	81,462,500
Q3 2012	272,951,978	Q3 2012	117,799,750	Q3 2012	131,375,000	Q3 2012	223,814,000	Q3 2012	95,325,000

Source: Barbour ABI

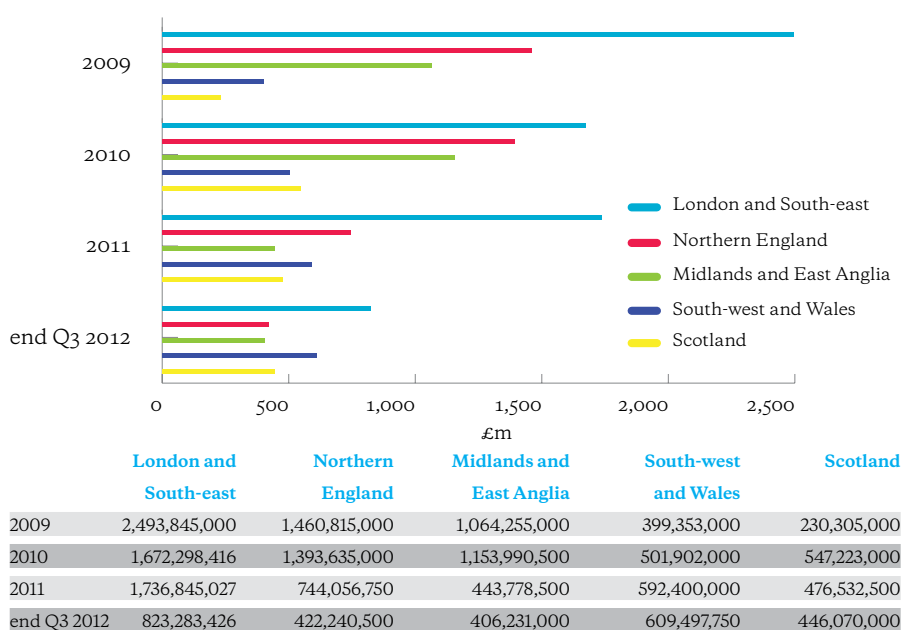
universities, which has seen that market reduce from £3.8bn in 2009 to £2.2bn in 2011 (for more information on the HEFE sector see section 7).

Within the schools sector, the decline in spending on primary schools has only begun to be felt during 2012. The market was broadly flat between 2010 and 2011; however, at the Q3 point in 2012, spending was at £750m lower than at the same point in either of those two years (it was £1.2bn at Q3 in both 2010 and 2011). By contrast, the pace of decline in secondary school construction has slowed in 2012. At Q3 in 2012, £1.2bn of work had been awarded in the secondary schools sector, which was £400m below levels at the same point in 2011. However, this was a smaller gap than between the Q3 points in 2010 and 2011, which was £600m (see figure 3).

Since 2009, the schools market regionally has been dominated by work in London and the South-east. The region has accounted for more work than any other in each of the past three years, and as of Q3 2012 had accounted for almost double the amount of work over the year to date than any other region. At that point, £832m of schools work had been awarded in London and the South-east, compared with £422m in northern England (the next highest English region) and £446m in Scotland. Regional data also shows that the gap between the amount of schools work awarded in London and the South-east and the other regions has widened since spending cuts took effect: in 2010, there was £300m difference between the amount of work awarded in London and the South-east and the North, but in 2011 this gap was £1bn. By 3Q 2012 the gap had narrowed slightly but at £800m was still vastly greater than in 2010 (figure 4).

However, despite the gap in value of work between London and the South-east and elsewhere, the market in the region was still in decline in 2012: work awarded by the end of Q3 totalled £823m, compared with £1.4bn by the same point in 2011. By contrast, there had been more work awarded at this point in northern England than at the same point in 2011, with contract awards totalling

[5] SCHOOLS CONTRACTS AWARDED BY REGION BY VALUE, 2009-Q3 2012



Source: Barbour ABI

£536m and £422m respectively. Northern England was the only regional market to have experienced an upturn by this point in 2012, with the Scottish market remaining flat and all others continuing to decline (figure 5).

### 3.5 MARKET OPPORTUNITIES AND CHALLENGES BY SCHOOL TYPE AND PROGRAMME

#### 3.5.1 Primary Schools

The pressure on primary school places means that, although the market has seen some decline since public spending cuts have taken effect, particularly over 2012, it is unlikely to drop significantly below current levels. The government forecasts that the number of children needing primary school places will increase by around 400,000 from current levels by 2014-15. In its autumn statement in 2011, the government announced an additional £500m to fund the creation of extra primary school places, which was allocated in April 2012. Primary schools will also account for a large proportion of £800m basic need funding announced for 2012-13, to be distributed by local authorities.

In addition to funds for projects to create additional primary places, primary school new-builds or large-scale refurbishments will also be funded under the PSBP in order to address poor building condition. One hundred and thirty nine of the 261 schools to be included in the PSBP until 2014-15 are primaries. These schools will be grouped and procured in batches alongside other projects (see section 4).

Primary school work that is not procured through the PSBP may be procured through open tender or through local or regional frameworks, meaning the market is accessible to SMEs. Although projects individually tend to be of a small scale, with new builds costing around £3m, there are numerous examples of local authorities packaging work together in order to increase economies of scale, thereby making schemes more attractive to larger companies.

#### 3.5.2 SECONDARY SCHOOLS

The main new-build construction programme for secondary schools is now the PSBP, with secondary schools making up 104 of the 261 schools included. This programme is discussed in detail in section 4. There is also substantial scope for work on secondary schools through free schools and academy programmes (see below).

Funding for secondary schools' maintenance and refurbishments is supplied through devolved formula capital and maintenance funding allocated to local authorities from the EFA. Work funded through these routes is procured directly by local authorities, often through local maintenance or minor works frameworks.

#### 3.5.3 ACADEMIES

There are two types of academy - sponsored academies, which are opened with the backing of a sponsor organisation or individual, and "converter academies", which are existing schools that free themselves from local authority control by converting to academy status. Academies can be primary or secondary schools. As of 1 December 2012 there were 2,543 academies open in England. A further 87 applications to become converter academies were received by the DfE in December 2012 alone.

Sponsored academies, which are intended to turn around underperforming schools, are most likely to involve construction work. Although there is no longer an explicit link made by the government between academy status and substantial capital investment, there is a trend for sponsored academies to seek funding from various government streams to reflect their new status.

Some of the funding for new build or major refurbishment for academies is now channelled through the PSBP. The last group of academies to receive the go-ahead for major projects prior to the launch of this programme was a group of 75 that had schemes stopped when BSF was cancelled but were then given approval by government in February 2011 to go ahead with scaled-back projects worth a total of £800m. These have

now all been procured by the EFA through its contractors framework or are included in existing procurements, so there are none left to come to market.

However, there will be large-scale standalone academies projects that are funded and procured separately to the PSBP. In the December 2012 autumn statement, chancellor George Osborne announced £980m of spending on new academies and free schools over the next two years. The government has not yet announced details of how these projects will be procured, but it is likely that a substantial amount of work will continue to go through the EFA's contractors' framework and its successor arrangements (see below), with architects appointed as part of contractor teams.

This framework is divided into north and south regions, and currently includes 15 companies: Apollo (south only), Balfour Beatty, BAM, Bovis Lend Lease, Carillion, Clugston (north only), Interserve, Kier, Leadbitter (south only), Sir Robert McAlpine, Vinci (north only), Wates and Willmott Dixon. However, it is due to expire in November, and the EFA will be procuring a new framework in 2013, with the process likely to begin in the spring. The form of the new framework has not currently been decided, but potential options include a regional split, or a split into major and minor projects. The replacement arrangement will be procured through OJEU.

The DfE operates consultancy frameworks for project management and education services, which groups launching academies are able to use for support in establishing the schools. There are 12 firms on each framework:

#### Project management

- Appleyards
- Mouchel Management Consulting
- Cambridge Education
- Novatia
- Capita Symonds
- PKF
- Deloitte
- Place
- EC Harris
- Tribal Education

- Edison Learning
- White Consultants

#### Educational Services

- Appleyards
- Mouchel Management Consulting
- Babcock 4S
- Novatia
- Cambridge Education
- PKF
- Edison Learning
- Prospects Services
- Education London
- Tribal Education
- Gleeds Management Services
- White Consultants.

Consultants for capital related work managed by the Education Funding Agency are procured through Government Procurement Service Frameworks or directly from the market.

In addition to new build and major refurbishment work, there are four funds that academies are eligible for to finance smaller scale projects: the academies capital maintenance fund, devolved formula capital, the 16-19 Demographic Growth Capital Fund and basic need funding.

The academies capital maintenance fund (ACME) for 2012-13 attracted bids for projects totalling projects, totaling £1.16bn, from 1,071 academies, which far exceeded the £276m available for the fund. Following the assessment process, almost £250m was allocated to 773 projects in 571 academies. The second application round has now closed. Almost 950 applications were received, requesting over £150m. The EFA expects to allocate £40m through this round on small-scale projects to complete by 31 March 2013. The final deadline for applications for the initial round of the 2013-14 fund is in February 2013, with allocations expected to be awarded in April. The government has not yet finalised how much funding is available, but it is expected to exceed the £276m available for 2012-13.

Work under the ACME is procured directly by academies.

#### 3.5.4 FREE SCHOOLS

Free schools - state-funded primary or secondary schools with academy status, which are free from local authority control - are a mainstay of the current government's policy on education. The first 24 free schools opened in September 2011, with a further 55 opening in September 2012. The government has approved a further 102 schools to open from 2013 onwards, and has ambitions to create hundreds more by the end of this comprehensive spending review period.

The vast majority of free schools created will require the creation of premises, as existing maintained schools are unable to apply to be free schools. This means that the only schools which will not require new sites are those that make arrangements to share premises with other schools, which is expected to apply in only a small minority of cases.

The government originally envisaged that the vast majority of free school developments would be created from the conversion of existing premises - either existing schools or other buildings - with a small number of new build. However, a shortage of suitable sites found so far means that the new-build element is likely to be greater than originally envisaged. The free school building programme will be supported by £980m of capital funding announced by the government in its autumn statement for the creation of new free schools and academies between 2013 and 2015.

Work for contractors on free schools is currently procured through both the EFA's contractor framework (due to be retendered in 2013, see section 4.2) and alternative arrangements, such as regional frameworks including Scape. Consultants for support in setting up schools can be appointed through the government's project management and education services framework, or through alternative arrangements.

The biggest risk to the free school programme remains a shortage of available sites. In London, mayor Boris Johnson is

'The EFA has been working very hard to identify suitable sites, but we need to be more creative about where free schools can be set up - including building multistorey schools rather than just having traditional two or three-storey blocks'

attempting to alleviate this problem by setting up a dedicated body to search for sites, called the London Schools Network.

#### 3.5.5 INTERVIEW: NATALIE EVANS, DIRECTOR, NEW SCHOOLS NETWORK

The New Schools Network provides advice and guidance on how to set up free schools. As part of its work, it reviews draft applications from groups wanting to set up free schools before they are sent to the Department for Education.

"So far, there are nearly 200 free schools that have either opened or in the pipeline to open. We were absolutely delighted that the chancellor announced additional funding for 100 more free schools and academies on top of the 100 we expect to be approved in this application round. By the time of the general election in 2015, we would therefore expect to see around 400 new free schools approved to open across the country. That all adds up to around 200,000 additional school places, which is extremely welcome news given the crisis of places that we see in many parts of the country. We want to see hundreds of free schools set up in areas where they are wanted and needed by parents.

"It is undoubtedly true that the challenges around finding sites for new free schools have been the single biggest brake on the progress of the free schools movement. That said, the pace of the programme has significantly outstripped that of academies when they were first introduced under the Labour government; in the first three years of academies, only 17 schools had opened - in the same timeframe, we already have around

**The biggest lesson that construction firms can learn from work carried out on free schools so far is that pace is of absolute paramount importance**

200 free schools.

“The EFA has been working very hard to identify suitable sites, but we need to be more creative about where free schools can be set up - including building multi storey schools rather than just having traditional two or three-storey blocks. We should also look to learn from what has worked with the charter schools in the US - there, many charter schools open in existing schools where they are under roll and have surplus space. This is a much more efficient use of publicly owned property and circumvents all the challenges around planning permissions and change of use. Yes, there will be other issues to consider, such as how the two schools co-exist, but the US experience shows us that these things need not be insurmountable.

“The availability of sites for free schools is a major problem and one that we need to think more creatively about. As well as different types of building, policymakers should also consider looking once again at the rules that currently prevent schools from borrowing. Addressing this issue would help free up the bottleneck that the lack of sites has created. However, Mike Green and his team at the EFA are working extremely hard to ensure that all free schools open on time. The news that the London mayor’s office will also be getting involved in helping to find sites is also welcome as the challenges in the capital have been particularly acute.

“In the current economic climate, ensuring value for money is crucial when deciding on suitable premises for a free school. In some cases a new build may be appropriate, but in others it will be a far better use of taxpayers’ money to renovate existing buildings - such as Wapping High School, which will be moving into a previously commercially

owned building.

“The biggest lesson that construction firms can learn from work carried out on free schools so far is pace is of absolute paramount importance. Free schools are being set up in areas where parents want an alternative to what is currently on offer, so once a school has been approved, getting it open in time for the start of the next academic year - even if that is in temporary accommodation - is key so that local families can benefit as soon as possible.”

### 3.5.6 UNIVERSITY TECHNICAL COLLEGES AND STUDIO SCHOOLS

University technical colleges (UTCs) and studio schools are types of free school. UTCs are learning environments for students aged 14 to 19, which are sponsored by universities and specialise in teaching technical subjects through combining practical and academic learning. The universities are funded by government as free schools, and construction work is currently procured through the academies framework. A replacement framework for this arrangement is due to be tendered in 2013.

However, officials are examining options for freeing up this procurement process, which could potentially open up additional work for construction firms and designers with education expertise and relationships with the sponsor universities. The government has currently committed to funding 34 UTCs; however, it aims to expand the programme to create at least 100 institutions over the next five years.

The process for institutions to apply for the next round of funding is open, with interviews set for January and February and decisions on a new round of UTCs due by the end of March 2013.

Studio schools are state schools for 14-19 year olds that offer academic and vocational qualifications through “enterprise projects” and practical work with local employers, with each school having a group of business partners connected to a particular industry sector. Students spend part of their week working in these businesses. Schools typically cater for around 300 pupils.

The first two studio schools - in Luton and Huddersfield - opened in September 2010. In July 2012, the government approved 15 new schools. It expects 30 studio schools to be open by September 2013, and has said it wishes to see “many more” around the country. Some studio schools are expected to be procured through the contractors framework and successor arrangements, although some may be procured through other mechanisms such as regional frameworks.

## 4/THE PRIORITY SCHOOLS BUILDING PROGRAMME IN DEPTH

### 4.1 SCHOOLS FOR INCLUSION

In total, 261 schools will be included in the Priority Schools Building Programme (PSBP) upto and including 2015; 42 of which will be funded by capital grant and the remainder through PF2, the government's revised form of PFI. A full list of the schemes to be included is in section 9, appendix K. The inclusion of further projects in the programme will be subject to future spending review decisions.

The schools to be funded by capital grant have been grouped into eight regional batches, as follows:

- North-east: Durham, East Riding, Gateshead, Sheffield, Stockton, Sunderland (nine schools, value: £60m-64m)
  - Midlands 1: Coventry (six schools, value: £32m-36m)
  - London: Barnet, Greenwich, Lambeth, Newham, Waltham Forest (five schools, value: £44m-54m)
  - North-west 1: Blackpool, Cheshire West, Halton, Manchester, Tameside (anticipated value: £42m; anticipated number of schools: 8)
  - South: Devon, Isle of Wight, Kent, Poole, Southampton (anticipated value: £32-41m; anticipated number of schools: 8-10)
  - East: Cambridgeshire, Essex, Hertfordshire (anticipated value: £23m; anticipated number of schools: 3)
  - Midlands 2 - Birmingham, Derby, Nottinghamshire (anticipated value: £28-31m; anticipated number of schools: 4-5)
  - North-west 2 - Liverpool, St Helens, Wirral (anticipated value: £22-28m; anticipated number of schools: 4-5).
- (\*Where information is marked "anticipated" this has not yet been confirmed).

### 4.2 PROCUREMENT – DIRECTLY FUNDED SCHOOLS

The directly funded schools, which have been grouped together on a regional basis,

are being procured through the Education Funding Agency's (EFA's) contractor framework. This framework is split into two regions: north and south. The companies on the framework are: Apollo (south only), Balfour Beatty, BAM, Bovis Lend Lease, Carillion, Clugston (north only), Interserve, Kier, Leadbitter (south only), Rydon (south only), Shepherd (north only), Sir Robert McAlpine, Vinci (north only), Wates and Willmott Dixon.

The first two batches of directly procured schools - the North-east and Midlands - reached invitation to tender (ITT) stage in November 2012, after bidders' days were held in October. Sir Robert McAlpine and Bam were shortlisted for the North-east, and Wates and BAM for Coventry. Contract awards for both batches are expected in late January 2013.

The bidders' day for the London batch was held in late 2012 with preliminary invitation to tender (PITT) stage expected in January. The Midlands 2 and East batches are also expected to reach PITT stage in January 2013, with North-west 1, North-west 2, and the South reaching this stage in January or February 2013.

The capital-funded schools will follow a shortened procurement process designed to speed up projects. The intended timeframes are approximately: a week's notice of a bidders' day, two-three-week PITT stage, one-week evaluation to select two bidders, six-week ITT stage, two-four-week bid evaluation, at the end of which a selected panel member is appointed, then a maximum of three months until financial close.

Contractors and their design teams are being asked to bid on the basis of one sample school (usually a secondary), but the design must be able to be adapted for the other schools in the batch.

### 4.3 PROCUREMENT – PF2 FUNDED SCHOOLS

The PF2-funded schools will also be

Procurement of the first two batches of PF2-funded schools is expected to begin next spring, with these expected to cover Luton and Hertfordshire and the North-east

procured in batches. Groupings for the whole programme are yet to be confirmed, but it is expected that all batches will be procured on a regional basis. It is currently expected that six batches will be procured in 2013, six in 2014, and six in 2015. However, there is a possibility that the programme could be accelerated.

Procurement of the first two batches is expected to begin this spring, with these expected to cover Luton and Hertfordshire and the North-east. A third batch, which is likely to cover the North-west, is expected to follow slightly later, with at least three more batches procured later in the year.

The batches of schools will be procured through OJEU, using reduced timescales put forward by the government under its new PF2 model. Contracts will be expected to be signed within one year of the OJEU notice, with the procurement process being cancelled if it runs for more than 18 months. There is expected to be an ITT stage of around three months, with a two-month evaluation period, followed by a period of around six months to reach financial close.

Contractors will be asked to bid on the basis of one or two sample schools, depending on the mix of schools in the batch. A batch with primary and secondary schools will have a sample school of each; batches with only secondary, for example, will require a secondary sample school.

Under the new form of PFI contracts,



contractors will be responsible only for construction and hard facilities management (FM) services, not soft FM services as has been the case under previous PFI deals.

#### 4.4 DESIGN

Since the publication in 2011 of Sebastian James' review into the future of schools procurement, the government has supported the use of a standardised approach to school design as a means of achieving cost savings. In October 2012, the EFA published two key documents - a Generic Design Brief and "baseline design guidance" - for schools to be built under the PSBP. Both documents apply to the PFI element of the programme and do not directly apply to capital funding schools, although Mike Green, the EFA's director of capital, has said he expects bidders on those projects to follow "the direction of travel" of the new design requirements.

Contractors must include three key pieces of information in relation to the design brief when submitting proposals:

- A Contractor's Schedule of Accommodation, showing proposed spaces
- A Contractor's Area Data Sheet, showing any derogations or proposals that are different from those set out in the Facilities Output Specification
- Contractor's FF&E layouts.

##### 4.4.1 THE GENERIC DESIGN BRIEF

This document gives a series of design requirements for schools to be built under the PFI element of the PSBP. For each project, it will be combined with school-specific briefs, detailing particular requirements of schools in the PFI batch, to form a Facilities Output Specification. School-specific schedules of accommodation, detailing the spaces required by each school, will form part of this Output Specification. In the event of any inconsistencies between the Generic Design Brief and the School-Specific Brief, the

School-Specific Brief will take precedence.

Key elements of the Generic Design Brief include:

- Schools should be based on "simple rectilinear forms"
- Schools must have a lifespan of 60 years or more
- Schools should meet BREEAM "very good" standard or equivalent
- Schools must comply with Part M disability regulations
- Acoustic standards must meet those in the EFA's draft Acoustic Design of Schools - Performance Standards for Schools (published 2012) which takes precedence over BB93 2003; in the interim contractors should follow the standards in "Acoustic Performance Standards for the Priority Schools Building Programme" which forms an appendix to the EFA's Generic Design Brief.
- Schools should aim to have a minimum Display Energy Certificate rating of C. If the use of legacy equipment prevents this, there should be a plan for future improvement through energy efficiency measures
- Overall gross area to be reduced on average by 15% in secondary schools and 5% in primary schools from Building Bulletin standards.
- Contractors are expected to meet a base cost per square metre of £1,465, although this is adjusted regionally according to a schedule of location factors.

##### 4.4.2 BASELINE DESIGN GUIDANCE

Alongside its Generic Design Brief, the EFA has published indicative sketch designs, developed to RIBA stage C, for two mainstream secondary schools catering for 1,200 pupils and a mainstream primary school catering for 420 pupils. The designs meet the requirements of the Generic Design Brief. One of the secondary school designs is based around a single block; the other takes a kit of parts approach. These designs are available from the Department for Education (DfE) website. The EFA has said it expects to

evolve the designs as the PSBP progresses, to reflect best practice. These designs are intended as examples to show how the EFA's Output Specification and cost criteria can be met, rather than fixed templates that designers must follow.

##### 4.4.3 LEVEL OF STANDARDISATION REQUIRED

The designs put forward by contractors and their design teams for the first schools in a batch must be "capable of being replicated for subsequent schools in the batch ...without the need for whole new designs", according to the EFA.

However, the EFA is flexible on the type of approach used to achieve this standardisation - it does not require exact replication of the schools. Approaches considered acceptable include: entire standardised schools or parts of schools; a kit of parts approach with standardised components; standardised dimensions and grids; standardised approaches to procurement including FF&E; and a common supply chain.

##### 4.4.4 SCOPE FOR FLEXIBILITY AROUND THE DESIGN GUIDANCE

The Output Specification allows for the possibility of lower performance standards to be applied to refurbished or retained buildings than to new build, both in terms of area and lower statutory requirements for refurbishment work in areas such as energy performance. Contractors and design teams are permitted to suggest further changes to non-statutory requirements in refurbishment projects on the basis of cost grounds that would mean the standards applied were lower than for new-build projects. However, contractors and designers will be expected to show how, even if it is uneconomic to refurbish to new-build standards at the outset of a project, those standards could be achieved as building elements are replaced over the lifetime of a project. Contractors are also permitted to suggest derogations

from the output specification if they can demonstrate they would provide better value for money, though the EFA will also require a compliant bid to be submitted.

#### 4.5 FUTURE CHANGES TO REGULATIONS IN 2013-2014

Several of the Building Bulletins, which advise on meeting the requirements of the premises regulations for schools, are being revised over the coming two years. BB101 (on ventilation) and BB100 (on fire safety design) are both currently being revised, and contractors will be expected to follow new forms of the guidance being issued in 2013. BB93 (acoustic design) is being reviewed and revised guidance, Acoustic Design of Schools - Performance Standards for Schools, is in draft form. Interim guidance has been published as part of the Generic Design Brief, and contractors should follow this rather than BB93. Updated versions of several other forms of schools guidance, including BB98 and BB99 will be issued in 2013 and 2014, which will take precedence over current forms of guidance.

## 5/UNDERSTANDING THE NEEDS OF SCHOOLS AND LOCAL AUTHORITIES

### 5.1 SCHOOL PLACE SHORTAGES

The latest data from the Department for Education (DfE), collected in 2011, shows that of 16,873 state-funded primary schools, 3,438 (20.4%) were full or had pupils in excess of school capacity. Of the 3,300 state-funded secondary schools, 837 schools (25.4%) were full or had pupils in excess of school capacity. However, the pressure on school places varies dramatically between local authority areas, as a result of the

impacts of migration and population growth in different locations. In line with this, some local authorities have a shortfall of places, and some have a surplus.

The following tables show the local authorities with the highest gap between current pupil places at primary level and the projected number of children of primary school age in the area by 2013/14, and for secondary pupils in 2015/16.

Full tables showing the forecast numbers of pupils at primary and secondary level

for every local authority in England, and the gap between these and current provision of places, are given in the appendixes.

\*For methodology, see section 8.3

#### [1] PUPIL PLACE FORECASTS IN PRIMARY SCHOOLS 2013-14 (RANKED BY GREATEST SHORTFALL)\*

	Local authority	No of places	Forecast pupil nos		Calculated shortfall
		May 2011	2012/13	2013/14	2013/14
1	Brent	23,013	26,846	27,883	4,870
2	Central Bedfordshire	18,007	21,764	22,447	4,440
3	Waltham Forest	20,551	23,942	24,951	4,400
4	Barking and Dagenham	19,615	22,219	23,877	4,262
5	Northumberland	19,011	22,821	23,095	4,084
6	Bristol, City of	29,724	31,508	33,318	3,594
7	Bedford	10,231	13,218	13,641	3,410
8	Newham	29,184	31,191	32,577	3,393
9	Lewisham	21,015	23,196	24,282	3,267
10	Hounslow	18,473	19,950	21,033	2,560

#### [2] PUPIL PLACE FORECASTS IN SECONDARY SCHOOLS 2015-16 (RANKED BY GREATEST SHORTFALL)\*

	Local authority	No of places	Forecast pupil nos			Shortfall	
		May 2011	2012/13	2013/14	2014/15	2015/16	2015/16
1	Hammersmith and Fulham	7,676	9,145	9,362	9,570	9,860	2,184
2	Redbridge	21,774	23,080	22,565	23,122	23,672	1,898
3	Milton Keynes	19,139	17,961	18,553	19,351	20,351	1,212
4	Barking and Dagenham	14,522	14,128	14,545	15,012	15,639	1,117
5	Haringey	14,651	13,575	14,309	15,615	15,740	1,089
6	Tower Hamlets	15,410	15,008	15,262	15,705	16,304	894
7	Wokingham	10,278	10,257	10,441	10,770	11,136	858
8	Waltham Forest	14,745	14,717	14,802	15,088	15,523	778
9	Slough	10,807	10,550	10,762	11,040	11,350	543
10	Brent	20,767	19,846	20,037	20,524	21,244	477

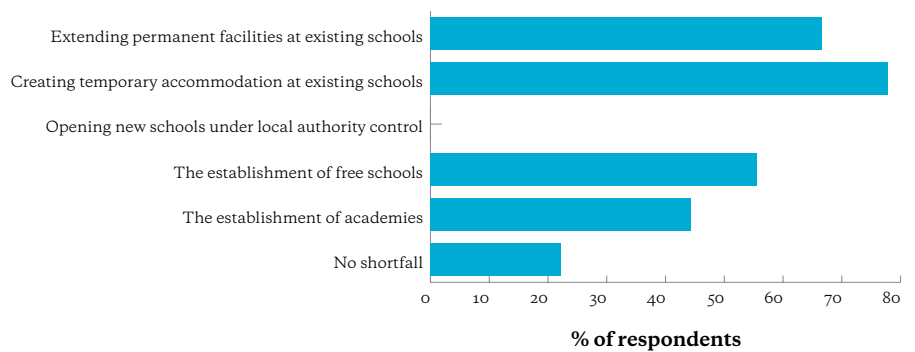
Source: School Capacity Survey and School Census, DfE

## 5.2 CLIENTS' SURVEY RESPONSES

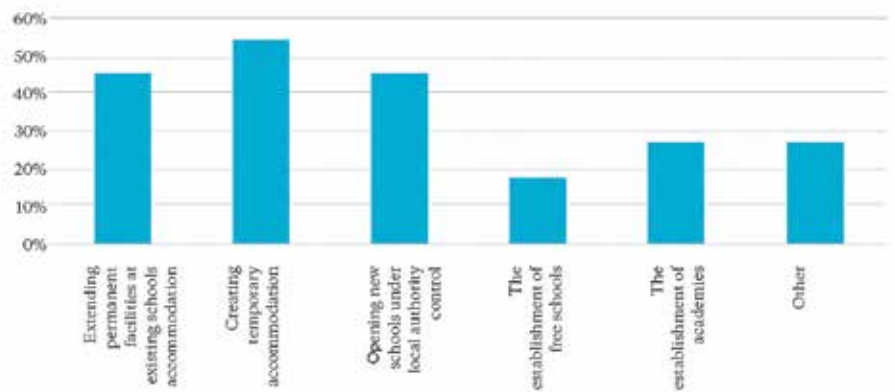
### 5.2.1 ADDRESSING SHORT-TERM NEED

The need to address pressing place shortages has led to increasingly high demand for extensions to existing schools. In a survey of local authorities for this white paper, 78% said that they expected to create temporary accommodation at existing schools to help meet a shortfall in places, while 67% said they expected to extend permanent facilities at existing schools (figure 3). Demand for both types of facility has risen since 2011, when 54% said they expected to create temporary accommodation and 45% said they expected to extend existing permanent facilities. The proportion of respondents expecting to meet shortfalls by establishing free schools or academies was lower at 56% and 45% respectively - but both were more popular options now than in 2011. Reflecting government policy, there was a strong shift away from the use of new schools under local authority control to address place shortages - no respondents to this white paper survey said they expected to use this method, compared with 45% in 2011 (figure 4).

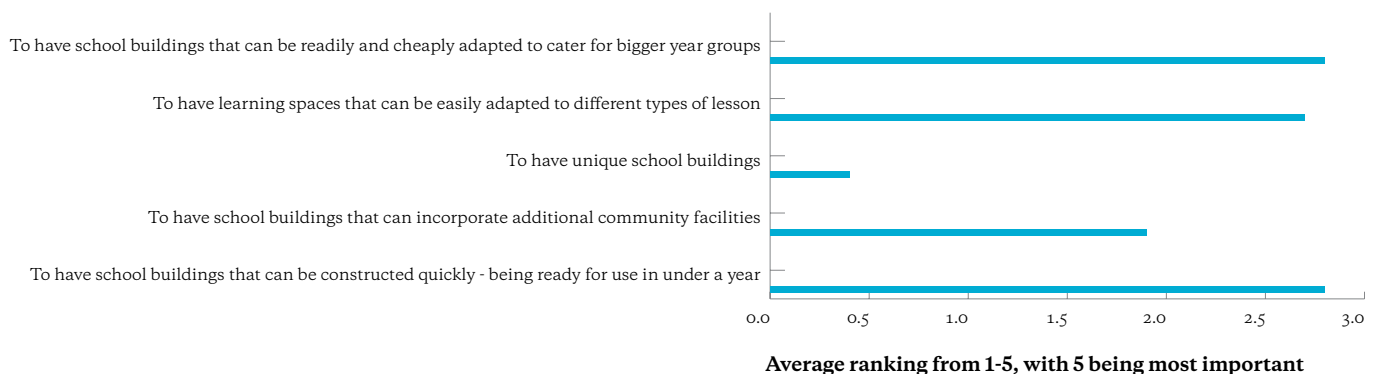
[3] HOW DO YOU EXPECT TO ADDRESS ANY SHORTFALL IN PLACES?



[4] RESPONSES TO THE SAME QUESTION [3] IN 2011 SURVEY



[5] RANK THE FOLLOWING IN ORDER OF IMPORTANCE TO YOU IN SCHOOL BUILDINGS (LOCAL AUTHORITY RESPONDENTS ONLY):



## 5.2.2 ATTITUDES TOWARDS DESIGN

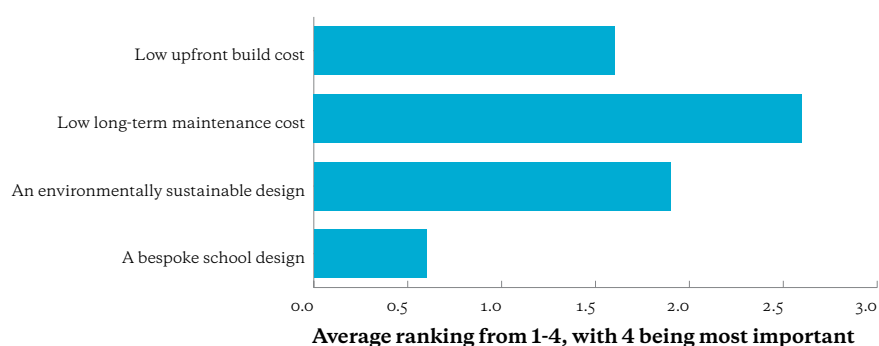
A major shift in attitude that has occurred over the last 18 months is local authorities' and schools' willingness to consider using fully standardised schools. Forty-six per cent of local authorities surveyed for this research said they would consider buying pre-designed schools, compared with 18% who were prepared to consider this in 2011. The increase was similarly striking among schools, with 40% now prepared to consider pre-designed projects compared with 11% in 2011. No local authorities or schools surveyed said they would only consider a bespoke design, compared with 26% of school professionals surveyed in 2011 who said they would only consider a fully bespoke school (no local authorities said they would only consider bespoke options at that time).

This shift suggests that local authorities and schools are now more engaged with, and realistic about, the government's strategy for school building and the likely level of available funding than they were 18 months ago.

The lack of importance placed on bespoke design was reflected when local authorities were asked to rank their design priorities in school buildings (figure 5). Having unique school buildings received the lowest average ranking, scoring 0.4 out of 5 (where 5 is the most important). The highest priorities for local authorities were jointly having school buildings that can be readily and cheaply adapted to cater for different year groups, and having school buildings that can be

No local authorities or schools surveyed said they would only consider a bespoke design, compared with 26% of school professionals surveyed in 2011 who said they would only consider a fully bespoke school

[6] RANK THE FOLLOWING IN ORDER OF IMPORTANCE TO YOU IN SCHOOL BUILDINGS (LOCAL AUTHORITY RESPONDENTS ONLY):



constructed quickly and be ready for use in under a year: both options scored 2.82 out of 5. This reflects the pressure created by rising pupil numbers, with the urgency to generate extra places now greater than it was 18 months ago. At that time, having buildings that could be easily adapted to different types of lesson and having schools that could incorporate additional community facilities were both seen as more valuable to local authorities than options that would enable them to quickly meet demand for pupil places.

Despite the desire to create additional space, however, local authorities are highly concerned about the long-term maintenance cost of buildings (figure 6). Having a low long-term maintenance cost was seen as a higher priority than low upfront build cost, with the two options receiving average rankings of 2.6 out of 4 and 1.6 out of 4 respectively (where 4 is the highest). An environmentally sustainable design was the second highest priority after low long-term maintenance cost, indicating an appreciation from local authorities of the connection between the two factors.

Like local authorities, schools rated a bespoke design as of lower importance than all other detailed design factors of a building from the options presented (figure

7). The highest priorities, however, differed between schools and local authorities, with school professionals viewing it as more important to have learning spaces that can be easily adapted to different types of lesson than having buildings that can either be constructed quickly or be readily and quickly adapted to cater for different sized groups. This is reflective of the fact that school professionals are far more directly impacted by the adaptability of space to different types of lessons than those working in local authorities. But it may also suggest a need for concern over the more engagement of school professionals in projects, as their views on the relative importance of design features differs from those who do not use the buildings directly.

In terms of more overarching construction, however, school professionals agreed with counterparts in local authorities that a low long-term maintenance cost was the highest priority (scoring an average of 3 out of 4), with an environmentally sustainable design considered the second highest priority (rating of 2.5), followed by low upfront build cost (1.67) and, finally, a bespoke design (1.33) - figure 8.

### 5.2.3 PREFERRED PROCUREMENT ROUTES

The majority of local authorities expect that government frameworks will be used to procure future school building work in their area: 46% of respondents said they expect the majority of work to be procured through these routes and a further 27% expect some work to be procured through them. This indicates a greater acceptance of the role of government-led frameworks than in 2011, when just 10% said they expected to procure the majority of work through this route.

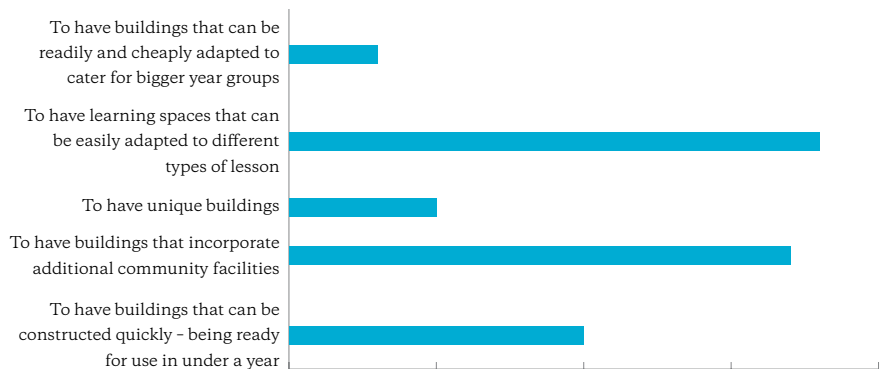
However, no local authorities said that they would exclusively use government frameworks for work, indicating instead that they would seek to use local frameworks or existing supplier arrangements (46% for smaller work and routine maintenance only, and 27% for work that included major projects). A further 27% indicated that they would prefer not to use the government's frameworks, indicating that there is still a sizeable amount of support for carrying out independent procurement where possible (figure 9).

Local authorities are clearly aware of the benefits of procuring jointly with other local authorities. Thirty-seven per cent of respondents said they were already involved in or were in discussion over joint procurement for education buildings, and a further 37% said they would consider partnering with neighbouring authorities to procure work but had not yet begun talks with potential partners. Just 9% said they would not consider joint procurement. This pattern indicates that local authority-led work could increasingly be bundled into larger packages or frameworks across regions, in line with the model being used by the Education Funding Agency to procure the Priority Schools Building Programme (PSBP).

### 5.2.4 FINANCING

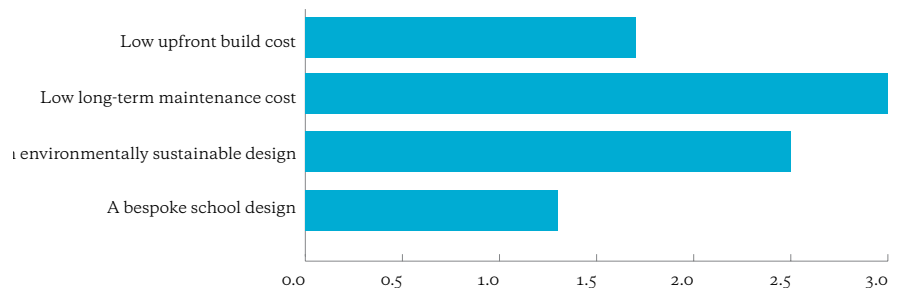
Although central government funding remains the main financing method for improvements to school buildings, the constraints on public funding together with the urgent need for building condition improvement and expansion in many schools

#### [7] RANK THE FOLLOWING IN ORDER OF IMPORTANCE TO YOU IN SCHOOL/COLLEGE BUILDINGS (SCHOOL RESPONDENTS ONLY):



Average ranking from 1-5, with 5 being most important

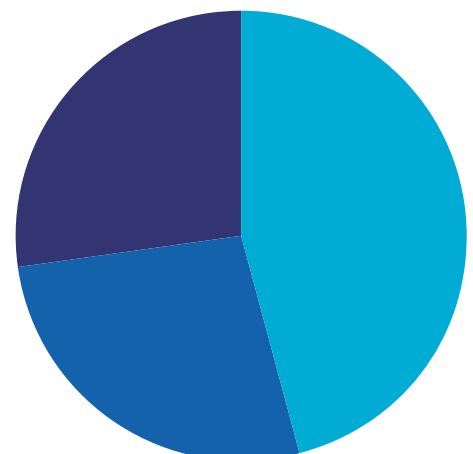
#### [8] RANK THE FOLLOWING IN ORDER OF IMPORTANCE TO YOU IN SCHOOL BUILDINGS (SCHOOL RESPONDENTS ONLY):



Average ranking from 1-4, with 4 being most important

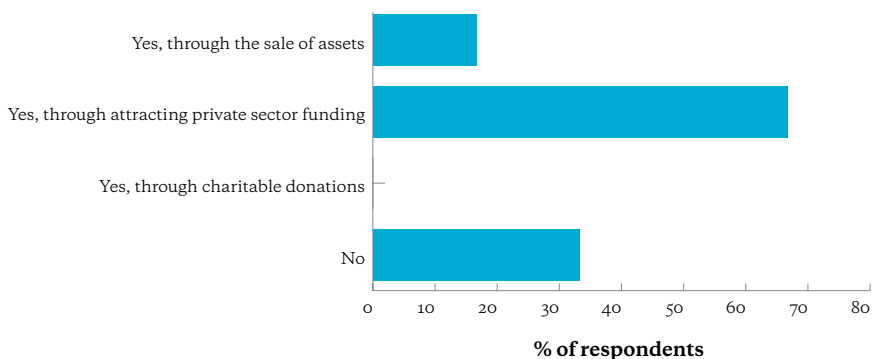
#### [9] HOW DO YOU EXPECT YOUR FUTURE PROCUREMENT TO WORK?

- All building/maintenance work through the government's national and regional frameworks 0%
- Most work through government frameworks but also local arrangements for smaller work 46%
- Some work through government frameworks but also local arrangements, including for major projects 27%
- No use of government frameworks 27%



means that there is a growing argument for schools to look to alternative forms of finance to fund projects. Sixty-seven per cent of schools questioned said they were considering trying to attract private sector funding for buildings, and 17% said they would look to supplement government funds through money generated from the sale of assets. However, 33% said they were not looking to other forms of funding, underlining the considerable reliance on central funding streams (figure 10).

[10] ARE YOU CONSIDERING RAISING FINANCE FOR SCHOOL BUILDINGS THROUGH MEANS OTHER THAN GOVERNMENT FUNDING?

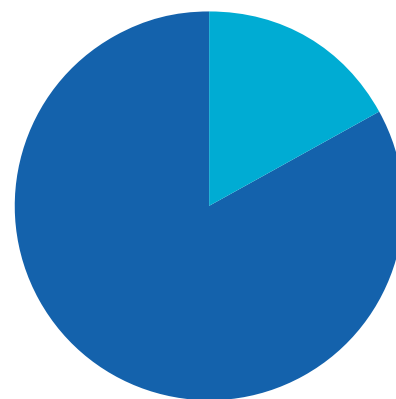


5.2.5 ENGAGEMENT WITH SUPPLY CHAINS

One of the most controversial aspects of the government's condensed procurement process for school building under the PSBP is the reduction in opportunity for detailed consultation with school staff and pupils over design. The survey responses for this white paper showed that this was an area of major concern among school professionals: 83% said they believed school buildings would suffer without as much direct input from end users (figure 11).

[11] TO SPEED UP PROCUREMENT, THE GOVERNMENT HAS RECOMMENDED LESS DETAILED CONSULTATION WITH STAFF AND PUPILS OVER SCHOOL DESIGN. DO YOU THINK THIS IS:

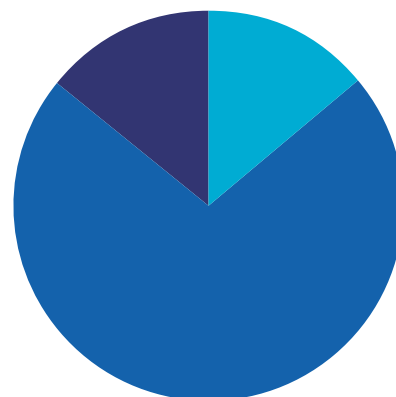
Positive	17%
Negative	83%
Don't know	0%



There was a similar level of concern about reduced engagement among local authority professionals, with 71% believing they would not have a satisfactory level of input into the selection of construction companies and school designs under the PSBP (figure 12).

[12] WILL YOU (LOCAL AUTHORITIES) HAVE A SATISFACTORY LEVEL OF INPUT IN TO THE SELECTION OF CONSTRUCTION COMPANIES AND SCHOOL DESIGNS UNDER THE PSBP?

Yes, I am totally satisfied with the level of input	14%
I believe we will have an acceptable level of input, although I would ideally have liked more	0%
No, I do not believe we will have a satisfactory level of input	71%
Don't know	14%



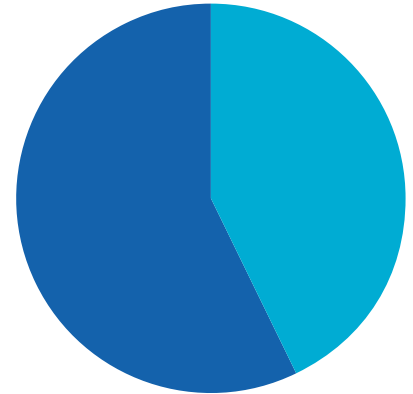
5.2.6 ATTITUDES TOWARDS GOVERNMENT POLICY

There is worrying evidence of a lack of understanding among local authorities about the detail of the PSBP, the government’s major school building initiative. Fifty-seven per cent of respondents said they were not clear about how procurement would work under the programme, compared with 43% who said that they were clear on the issue (figure 13). This is likely to be partly reflective of confusion around reforms to PFI, which were not released until December 2012 and are still being absorbed by local authorities.

Local authorities are pessimistic about whether the government’s policies on school building will be able to deliver the needed improvements to the country’s school estate. Fifty-five per cent of respondents said they were “not very confident” that the policies would deliver the necessary improvements, while 18% said they did not believe that they would. Just 9% said they felt “fairly confident”, while no respondents said they were very confident (figure 14). Frustration over government policy was also strong among school professionals, with 49% saying they felt the government’s handling of the school building programme was unsatisfactory (figure 15).

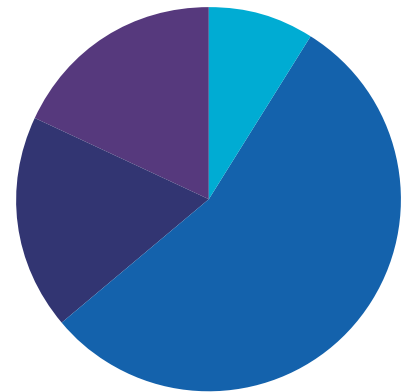
[13] ARE YOU CLEAR ABOUT HOW PROCUREMENT WILL WORK UNDER THE PSBP?

■ Yes	43%
■ No	57%



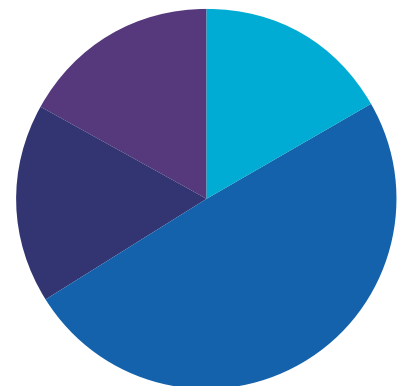
[14] HOW CONFIDENT ARE YOU (LOCAL AUTHORITY RESPONDENTS) THAT THE GOVERNMENT'S POLICIES WILL BRING ABOUT THE NECESSARY IMPROVEMENTS TO THE UK SCHOOL ESTATE?

Very confident	0%
■ Fairly confident	9%
■ Not very confident	55%
■ I do not believe they will lead to the necessary improvements	18%
■ Don't know	18%



[15] WHAT IS YOUR VIEW (SCHOOL RESPONDENTS) OF THE GOVERNMENT'S HANDLING OF THE SCHOOL BUILDING PROGRAMME?

Excellent	0%
Good	0%
■ Satisfactory	17%
■ Unsatisfactory	49%
■ Poor	17%
■ Very poor	17%





## 6/ DESIGN AND CONSTRUCTION SOLUTIONS

### 6.1 RANKINGS OF THE MOST ACTIVE CONSTRUCTION COMPANIES

The data below, provided by Barbour ABI, shows the 10 firms in each discipline (architects, consultants and contractors) that have been most active in the schools sector over the past year, ranked by number of new-build contract wins. The second set of tables in each discipline shows the top 10 firms that have been most active across all education, also taking into account the colleges and universities sector. The top 50 firms in each category are supplied in the appendixes.

For methodology, see section 8.2.

#### [1] MOST ACTIVE ARCHITECTS IN THE SCHOOLS SECTOR 2012\*

Ranking	Company	Projects of schemes appointed on	Value (£)
1	NPS Property Consultants	41	85,306,228
2	WS Atkins	22	64,853,000
3	Mace	16	33,271,500
4	Hampshire County Council	14	34,850,000
5	Mouchel Group	13	25,547,000
6	Capita Group	13	33,247,500
7=	Jacobs	12	16,005,000
7=	Aedas	12	62,720,000
9	EC Harris	10	25,400,000
10=	Architect Design Partnership	9	22,784,348
10=	Jestico Whiles & Associates	9	112,060,000
10=	Watts & Partners	9	5,780,000

#### [2] MOST ACTIVE CONSULTANTS IN THE SCHOOLS SECTOR 2012

Ranking	Company	Projects of schemes appointed on	Value (£)
1	NPS Property Consultants	40	176,628,684
2	Mace	26	119,621,500
3	Turner & Townsend	22	61,998,000
4	WS Atkins	21	173,897,500
5	Gardiner & Theobald	18	134,550,000
6=	Ramboll UK	17	228,000,000
6=	AECOM	17	128,370,000
8=	EC Harris	16	85,100,000
8=	Jacobs	16	54,730,000
10=	Capita Group	15	103,752,500
10=	Mouchel Group	15	79,347,000
10=	Curtins Consulting	15	161,526,000

[3] MOST ACTIVE CONTRACTORS IN THE SCHOOLS SECTOR 2012

Ranking	Company	Projects of schemes appointed on	Value(£)
1	Morgan Sindall	41	127,885,000
2	Kier Construction	39	280,355,000
3	Willmott Dixon Construction	34	196,901,500
4	Mansell	24	76,316,848
5	BAM Construction	19	260,655,000
6=	Balfour Beatty	18	165,487,500
6=	Carillion	18	150,820,000
6=	ISG	18	37,262,750
9	Lakehouse Contracts	15	17,614,000
10	Wates Construction	14	89,130,000

[4] MOST ACTIVE ARCHITECTS IN ALL EDUCATION 2012

Ranking	Company	Projects of schemes appointed on	Value(£)
1	NPS Property Consultants	46	92,456,228
2	WS Atkins	27	70,263,000
3	The Bond Bryan Partnership	19	209,660,000
4	Capita Group	18	54,247,500
5=	Hampshire County Council	17	36,750,000
5=	Aedas	17	105,320,000
7	Mace	16	33,271,500
8	Ingenium Archial	15	99,350,000
9	Mouchel Group	14	30,547,000
10=	Jacobs	13	17,505,000
10=	Architect Design Partnership	13	62,984,348
10=	Building Design Partnership	13	221,000,000
10=	EC Harris	13	53,800,000

[5] MOST ACTIVE CONSULTANTS IN ALL EDUCATION 2012

Ranking	Company	Projects of schemes appointed on	Value(£)
1	Turner & Townsend	70	427,748,000
2	NPS Property Consultants	46	186,828,684
3	Gardiner & Theobald	45	553,800,000
4	Ramboll UK	38	631,400,000
5	AECOM	37	543,370,000
6	Davis Langdon	35	348,270,000
7	Gleeds	33	113,385,000
8	WS Atkins	28	247,647,500
9	Mace	27	122,921,500
10	Capita Group	26	299,802,500

[6] MOST ACTIVE CONTRACTORS IN ALL EDUCATION 2012

Ranking	Company	Projects of schemes appointed on	Value(£)
1	Morgan Sindall	59	221,662,500
2	Kier Construction	55	404,980,000
3	Willmott Dixon Construction	44	278,751,500
4	Mansell	43	141,295,348
5=	BAM Construction	31	483,625,000
5=	Balfour Beatty	31	260,137,500
7	ISG	29	58,392,750
8	Interserve	24	136,085,000
9	Carillion	21	207,600,000
10	Wates Construction	20	149,247,500

Source for all rankings: Barbour ABI

## 6.2 SURVEY RESPONSES

### 6.2.1 MARKET CONFIDENCE AND BUSINESS STRATEGY

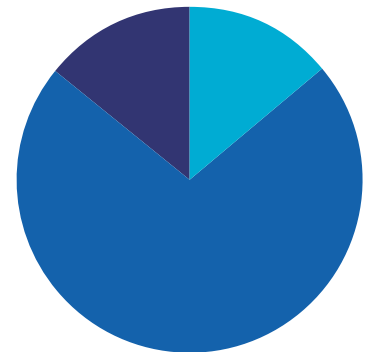
Despite the cuts to education funding and market size, construction firms still identify the area as a priority in terms of business opportunity over the next four years. Forty-four per cent of firms surveyed for this white paper said that the sector was “extremely important - it is one of our biggest areas of focus”, with a further 48% saying it was “important” and they were targeting significant workload in the area. Just 7% said they did not consider the sector important to their business (figure 7). Construction companies consider the sector to be even more important than they did 18 months ago: 92% of respondents in total for this white paper said the market was either important or very important, compared with 87% in the survey for Building’s July 2011 education white paper.

The Priority Schools Building Programme was identified as the biggest area of opportunity when firms were asked to rank different areas of education work in order of priority to their business, scoring an average rating of 3.49 (out of 5, where 5 is the most important). Secondary and primary schools outside of the programme also scored highly, with ratings of 3.19 and 3.18 respectively, as did higher education with 3.02. The lowest ranked area of opportunity was free schools, which scored 2.51. However, the marginal difference between the various programmes indicates that the whole sector remains highly competitive (figure 8).

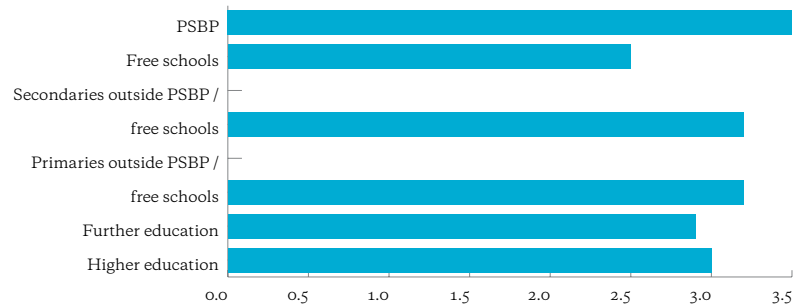
The increased importance placed by businesses on the education sector was also reflected in the proportion of companies that said they would bid for future national frameworks for schools work - 60% of respondents said they would do so, with 15% saying they would not and 25% undecided (figure 9). In 2011, 52% of respondents said they would bid, with 24% saying they would not and 24% undecided.

### [7] HOW IMPORTANT DO YOU EXPECT THE UK EDUCATION SECTOR TO BE TO YOUR BUSINESS OVER THE NEXT FOUR YEARS?

Extremely important	44%
Important	48%
Of interest	7%
Not important	1%



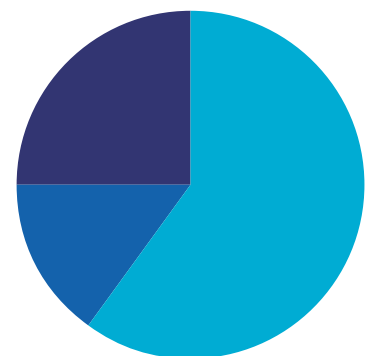
### [8] WHICH ARE THE AREAS OF PRIORITY FOR YOUR COMPANY IN EDUCATION WORK?



Average ranking from 1-6, with 6 the biggest area of opportunity

### [9] WOULD YOUR COMPANY BID FOR FUTURE NATIONAL FRAMEWORKS FOR SCHOOLS WORK?

Yes	60%
No	15%
Undecided	25%



The highest proportion of respondents - 36% - said they had not altered the size of their education business over the past year, reflecting the fact that the sector has consistently been considered a high priority for construction firms even during an era of reduced spending. Of the firms that had changed the size of their division, there was an even split between those who had increased its size (23%), and those who had decreased or disbanded (23% when these two options are combined). Only a fraction of this latter 23% - 3% of the overall number of respondents - had disbanded the division, and all of those said they were continuing to pursue education projects (figure 10).

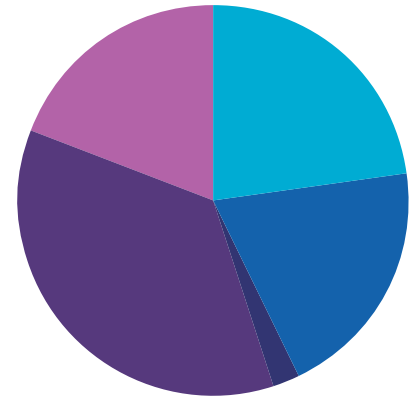
#### 6.2.2 TARGETED COSTS

There has been a slight drop in confidence among construction firms over the achievability of the government's targeted cost savings over the past 18 months. In July 2011, just over half (51%) of respondents believed that the government's target of saving 30% of the cost of building schools, compared with the Building Schools for the Future era, was achievable; however, in the survey for this year's white paper that figure had dropped to 45%. The percentage of respondents who did not believe the savings could be achieved remained broadly flat (34% in 2011 and 33% this year). Twenty-two per cent responded that they did not know, compared with 15% last year (figure 11).

In terms of the achievable cost of building for secondary schools, the estimates given by construction companies were, encouragingly, slightly lower than firms believed possible 18 months ago, when design work on more efficient school buildings was at an earlier stage. A total of 48% of respondents believed that an eight-form secondary school could have an achievable outturn cost of below £1,500/m<sup>2</sup> (excluding landscaping, abnormals, furniture, ICT, overhead and profits), compared with 40% in 2011. Thirty-two per cent of all respondents believed that

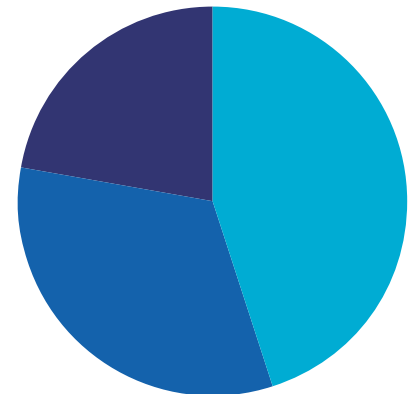
#### [10] HAS YOUR COMPANY MADE CHANGES TO THE SIZE OF ITS EDUCATION DIVISION OVER THE PAST YEAR?

■ Yes, we have increased the size of our education division	23%
■ Yes, we have decreased the size of our education division	20%
■ Yes, we have disbanded our formal education division but are still pursuing education projects	3%
■ No change	36%
■ We do not have an education division	19%



#### [11] DO YOU THINK THAT THE GOVERNMENT'S TARGET OF SAVING 30% FROM THE OVERALL COST OF BUILDING SCHOOLS IS ACHIEVABLE?

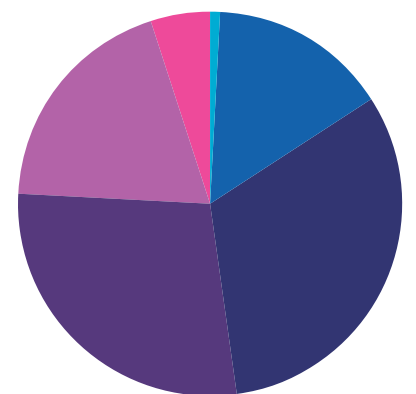
■ Yes	45%
■ No	33%
■ Don't know	22%



#### [12] WHAT DO YOU THINK IS AN ACHIEVABLE OUTTURN COST PER M<sup>2</sup> FOR AN EIGHT-FORM ENTRY SECONDARY SCHOOL\*?

■ Less than £1,000	1%
■ £1,000-1,250	15%
■ £1,251-1,500	32%
■ £1,501-1,750	28%
■ £1,751-2,000	19%
■ £2,001-2,500	5%

\* Excluding landscaping, abnormals, furniture, ICT, overhead and profit



an achievable outturn cost was between £1,251/m<sup>2</sup> and £1,500/m<sup>2</sup>, whereas in 2011 this level and £1,501-1,750/m<sup>2</sup> were equally the most popular, both with 32%. In this year's research, the percentage of respondents believing that £1,501-1,750/m<sup>2</sup> was the lowest achievable outturn cost had dropped to 27% (figures 12 and 13).

However, despite this slight lowering of the cost per square metre of secondary schools, respondents' view on the achievable overall build cost remained broadly in line with estimates given in 2011. The largest group of respondents (25%) again believed that the lowest achievable build cost for an eight-form secondary school was between £12.6m and £15m (26% selected this band in 2011, when it was again the most popular estimate). Overall, 47% of respondents believed an eight-form secondary school could be built for £15m or less, roughly the same percentage as in 2011, 48% (figures 14 and 15).

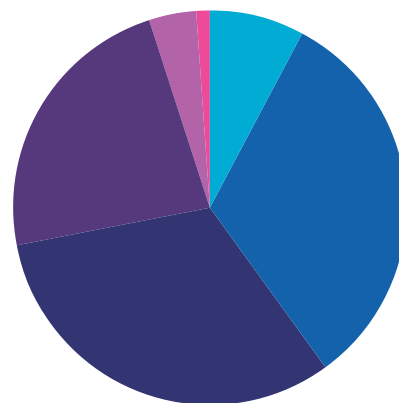
The most commonly given estimate on the build cost of primary schools was slightly lower than in 2011. The highest number of respondents (35%) believed that a two-form-entry primary school could be built for £3m-4m; whereas in 2011 the highest number (36%) believed it could be built for £4.1m-5m. However, overall there was a drop in the percentage who believed a school could be built for below £5m (72% in 2011, 61% in this research), reflecting a greater spread of views among respondents and specifically an increase in the number of respondents who believed £5.1m-6m to be the lowest achievable build cost (figures 16 and 17).

### 6.2.3 DESIGN STRATEGY

Half of the firms that responded to the survey (50%) are currently working up standardised design concepts, with the vast majority of these (and 38% of the total number of respondents) doing so in partnership with other firms. This is a slight increase on 2011, when 48% said they were working up standardised design concepts, with 34% doing so in partnership with other firms. Of the 50% that said they were not working up concepts, 54% (and 27% of the total number

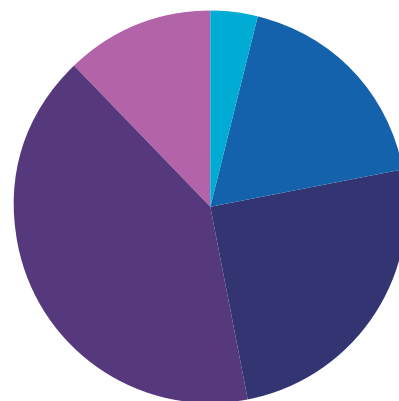
[13] RESPONSES TO THE SAME QUESTION [12] IN 2011 SURVEY

■ £1,000-1,250	8%
■ £1,251-1,500	32%
■ £1,501-1,750	32%
■ £1,751-2,000	23%
■ £2,001-2,500	4%
■ More than £2,500	1%



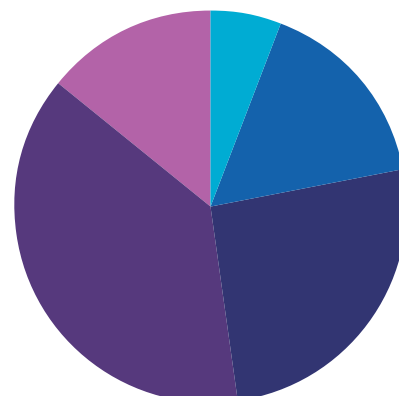
[14] WHAT OVERALL BUILD COST DO YOU THINK IS ACHIEVABLE FOR AN EIGHT-FORM ENTRY SECONDARY?

■ Less than £10m	4%
■ £10m-12.5m	18%
■ £12.6-15m	25%
■ £15.1-20m	41%
■ More than £20m	12%



[15] RESPONSES TO THE SAME QUESTION [14] IN 2011 SURVEY

■ Less than £10m	6%
■ £10m-12.5m	16%
■ £12.6-15m	26%
■ £15.1-20m	38%
■ More than £20m	14%



doing so (figure 18).

Construction firms' views on where the most significant savings to the cost of school buildings could be made remained broadly consistent with those expressed in 2011. Firms believed the biggest savings could be found by reducing design costs through greater use of standardisation - this scored an average ranking of 1.92 out of 4, where 4 is the most significant. Reducing procurement costs was the second highest area identified, with an average ranking of 1.89, while the greater use of offsite construction scored 1.74 and reducing sustainability measures scored the lowest at 1.17 (figure 19). This was the same order of preference as in 2011, although there was less marked difference in weighting between the various options among this year's respondents.

#### 6.2.4 ATTITUDES TOWARDS GOVERNMENT POLICY

Despite recent progress on initiatives such as the Priority Schools Building Programme, construction firms remain unhappy about the government's management of current school building programmes. Almost 80% of respondents said they were either dissatisfied or very dissatisfied over the issue, with 20% saying they were satisfied and 1% very satisfied (figure 20).

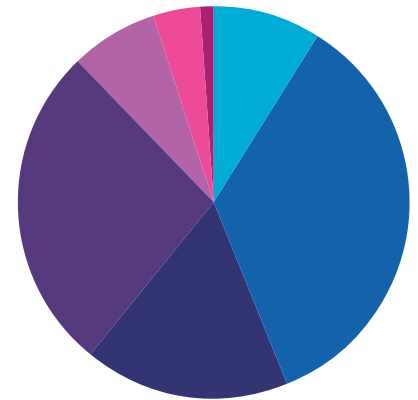
However, the perception among construction firms is that the government has improved its communication over the future of the school building programme - although it is still generally regarded as poor. Forty-six per cent of respondents rated the government's communication as poor and 16% as extremely poor, while 34% regarded it as fair and 4% good. No respondents rated it as excellent (figure 21). This compares to 54% who, in 2011, rated it as poor, 19% extremely poor, 22% fair and 5% good.

The aspect of school building programmes that most respondents were uncertain about was timescales, with 64% saying they were unclear on the issue. This was closely followed by procurement routes (63%), design standards (55%) and funding (51%), with 41% being unclear on bid criteria. Just 11% of respondents said they were clear on all of the above aspects (figure 22).

#### [16] WHAT OVERALL BUILD COST DO YOU THINK IS ACHIEVABLE FOR A TWO-FORM ENTRY PRIMARY SCHOOL\*?

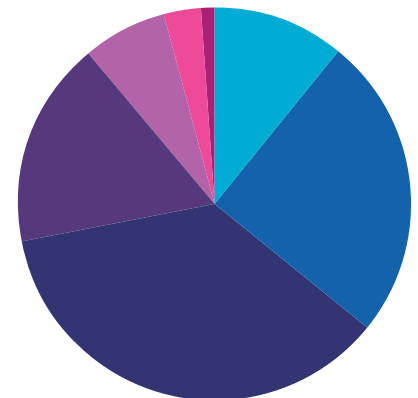
■ Less than £3m	9%
■ £3m-4m	35%
■ £4.1m-5m	17%
■ £5.1m-6m	27%
■ £6.1m-7m	7%
■ £7.1m-8m	4%
■ More than £8m	1%

\* Excluding landscaping, abnormals, furniture, ICT, overhead and profit



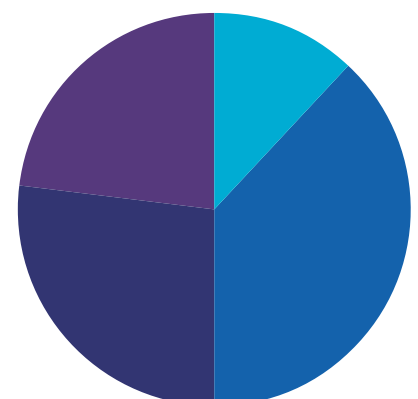
#### [17] RESPONSES TO THE SAME QUESTION [16] IN 2011 SURVEY

■ Less than £3m	11%
■ £3m-4m	25%
■ £4.1m-5m	36%
■ £5.1m-6m	17%
■ £6.1m-7m	7%
■ £7.1m-8m	3%
■ More than £8m	1%

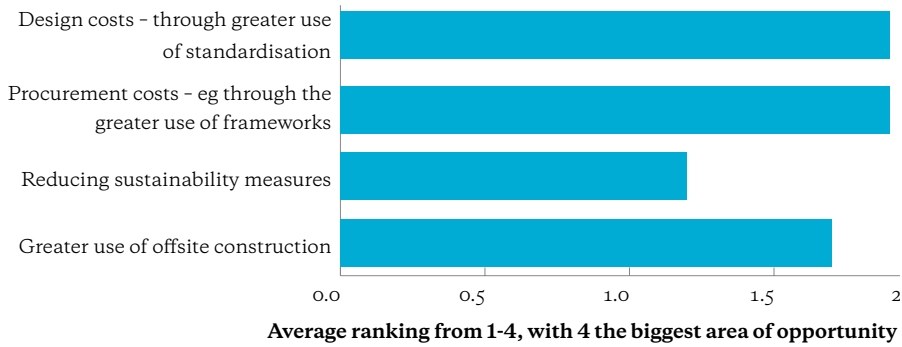


#### [18] ARE YOU WORKING UP STANDARDISED SCHOOL DESIGN CONCEPTS, EITHER ALONE OR AS PART OF A SUPPLY CHAIN / PARTNERSHIP?

■ Yes, my company is working up concepts alone	12%
■ Yes, my company is working up concepts in partnership with one or more other companies	38%
■ No, but we are considering doing so	27%
■ No, and we have no intention of doing so	23%

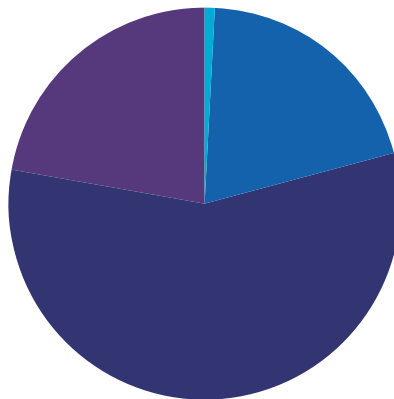


[19] RANK THE FOLLOWING IN ORDER OF WHERE YOU BELIEVE THE MOST SIGNIFICANT SAVINGS CAN BE MADE TO THE COST OF SCHOOL BUILDINGS



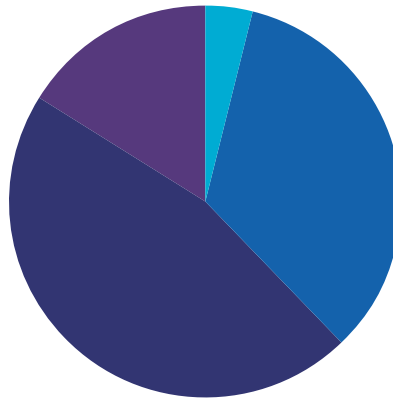
[20] HOW SATISFIED ARE YOU WITH THE GOVERNMENT'S MANAGEMENT OF CURRENT SCHOOL BUILDING PROGRAMMES?

- Very satisfied 1%
- Satisfied 20%
- Dissatisfied 57%
- Very dissatisfied 22%

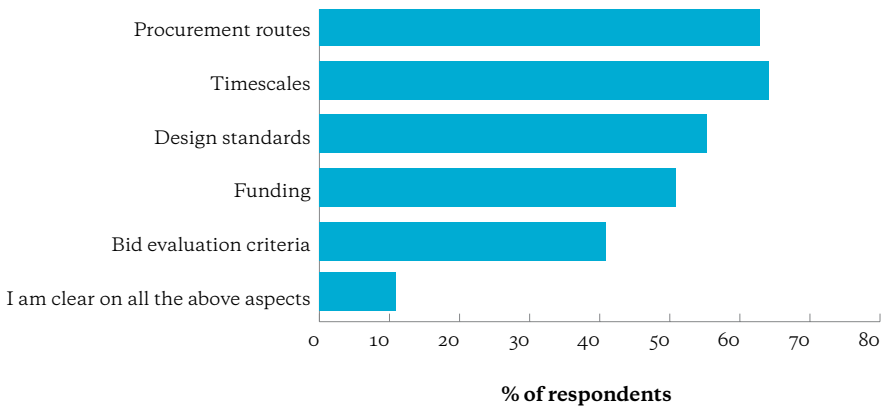


[21] HOW DO YOU RATE THE GOVERNMENT'S SUCCESS IN COMMUNICATING THE FUTURE OF THE SCHOOL BUILDING PROGRAMME TO SCHOOLS AND INDUSTRY?

Excellent	0%
Good	4%
Fair	34%
Poor	46%
Extremely poor	16%



[22] WHAT ASPECTS OF THE WORKING OF THE FUTURE SCHOOL BUILDING PROGRAMME ARE YOU UNCLEAR ABOUT (SELECT ALL THAT APPLY)?





## 6.3 STANDARDISED DESIGN SOLUTIONS – CASE STUDIES

### 6.3.1 INTERSERVE: THE PODSOLVE MODEL

#### Project team involved in developing the model

##### Main contractor and project principal:

Interserve Construction

##### Architect: Maber

##### Civil/Structural and M&E consultant: Arup

M&E installation: Interserve Engineering Services

##### Pod manufacturer: Norwood

Interserve and the team above are responsible for the delivery and management of the project with a local supply chain providing numerous services.

#### Description of the model

Podsolve is based around a standardised model that incorporates traditional elements of construction together with manufactured off-site classroom pods.

Although the design has standard features, its size can be altered to cater for various needs for space and layout, and can accommodate a mixture of spaces, including sports halls and offices, and areas that can house pods. These pods can be used for a range of classroom types, from standard teaching spaces to IT and science labs. The nature of the pods also means that as the needs of the school change, they can be added, taken away or individually extended.

The building envelope consists of double-glazed curtain walling, composite cladding panels, a built-up cladding system, and polycarbonate glazing. The design is completed by a built-up roof deck, plus concrete roofing with a single-ply membrane covering and roof lights, all of which is supported on a structural steel frame.

The building is aligned east-west, which allows for the use of photovoltaic cells on the south-facing slope of the “northlight” roof, with natural light fed in from the north-facing glazing.

Access to the building is via a main entrance in the centre of the north facade.

This element is key to the design, as it delivers a central access point for both pupils and the community. Shared community facilities are located along the northern element of the building, which enables the school to close off teaching areas, but still allows the community to enter outside core hours.

The internal northern-most two-storey element of the building is constructed using traditional building methods. Each room has a frontage in the same style. This part of the building contains all the double-height spaces, which are available as multi-purpose facilities for use by the school and community.

On the second storey, there are five pods (although more can be added to expand the school capacity by up to 25%). These are used to create science studios and combined business and ICT classrooms, and are supported on a mezzanine-style concrete slab, on a steel frame. Here all services are suspended from the roof with an umbilical cord to each pod.

#### Sustainability

In addition to the core elements of the design, the following energy saving and carbon reduction features are also incorporated.

- Building orientation and optimised glazing/shading solutions (including provision of a northlight roof) to avoid excessive summer solar gain, while maintaining good daylight quality within the main space.
- Well-sealed, well-insulated building envelope.
- Combined heat and power plant (approximately 45kW capacity) to supply the building’s heating and hot water systems.
- Automatic building energy management and daylight compensation lighting control systems.
- Heat recovery from extract air to pre-heat building supply air.
- Centralised plant solution with simple downstream distribution to space.
- Roof mounted PV array (covering up to 90m<sup>2</sup> and generating 50kW peak power).

The nature of the pods means that as the needs of the school change, they can be added, taken away or individually extended

#### Future flexibility

It takes five days to add in an additional pod classroom of 50- 60m<sup>2</sup>.

Due to its size and rectangular shape, where the school is housed in one large two-storey structure, the pods can be removed and the building reused for other applications.

#### Types of school offered

The solution is designed for secondary and larger school needs, although it can be adapted for primary applications.

The model is currently designed as a new-build option; however the pods can and have been combined in the past to remodel schools.

#### Length of construction programme

The first secondary school will take 14 months to build and fit out. Interserve expects that future programme and procurement efficiencies will reduce this to less than a year. Primary schools will be in the range of 35-42 weeks.

#### Life expectancy

The design life of the major components such as structure and substructure is 60 years.

#### Total costs

A PodSolve school has the potential price of £1,390/m<sup>2</sup>, including fees, overheads and profit according to Interserve. This figure compares favourably with the Priority Schools Building Programme all-in price of £1,465/m<sup>2</sup>. Interserve says it is confident that it will be able to get the net build cost inside the net build cost figure of £1,113/m<sup>2</sup> required by the Priority Schools Building Programme.

The figures are based on the following assumptions:

- A flat greenfield site with clear access
- No planning constraints and restrictions or other buildings to consider
- No neighbours or other site variables that require design changes

#### Current PodSolve scheme: Leeds East Academy

Interserve's first contract using the model is with Leeds council, for Leeds East Academy which will be operated by EACT. This is currently under construction and will be handed over to the school in February 2013. Work started on site on 20 October 2011.

The academy will be six-form entry with 300 post-16 pupils and 1,100 places in total. It has a total cost of £13.65m - excluding IT - and a gross internal area of 8,442m<sup>2</sup>. There are some external works but no major external sports provision. Including in the cost are the demolition of the old school, planning requirements and all abnormals.

The school has a BREEAM rating of very good. In terms of designed-in sustainability, the large volume of the building envelope allows for very efficient heating and ventilation, which is undertaken by substantial centralised plant. It also uses natural ventilation for all of the internal enclosed pod classroom spaces. Additional benefits are gained from photovoltaics and the northlight roof design.

Leeds East Academy was designed prior to the publication of the EFA's Output Specifications. However, Interserve says the design conforms to the EFA's baseline design guidance and also provides additional space, adding that the design principles ensure future-proofing against changing requirements and climate change. This is achieved through flexibility and adaptability of the envelope design and the servicing solution. Each project is modelled using exact orientation and location factors to determine precise daylight, heating and ventilation criteria.

### 6.3.2 WILLMOTT DIXON: SUNESIS CONCEPT

#### Project team involved in developing the model

**Contractor** Willmott Dixon

**Client** Scape

**Consultants** A variety of teams including architects Hunters, White Design, HKS, and S&P.

The consultants responsible for developing the base designs also work on specific projects in most cases - including obtaining planning approval and all other relevant permissions.

#### Description of the model

Sunesis is a joint venture between Willmott Dixon and Scape. It was originally developed in anticipation of the Sebastian James Review, which highlighted the need for greater efficiency in school building projects, with the objective of driving this efficiency through standardisation.

All Sunesis projects use a fully designed template as their basis. All also use a kit of parts. The extent to which they do this varies according to design complexity.

In terms of methods of construction, they all tend towards traditional approaches. A key part of the Scape Framework is local delivery, and a factory approach does not lend itself to this.

Other than the standard design options (as identified on the Sunesis website), no major changes are possible.

#### Types of school offered

There are four primary school models in a variety of different form entry (FE) sizes (from 1FE to 3FE plus nursery):

- Keynes is the entry-level primary school starting at £2.2m for a 1FE, which rises to £3.6m for a 2FE with a nursery.
- Dewey is a multistorey option which has been design for a constrained site. This is available from £3m to £5.5m, from 2FE to 3FE with a nursery.
- Newton is a single-storey 1FE option, with an enclosed courtyard where pupils can play. Newton is available from £3.3m.
- Paxton is available as 1.5FE and 2FE, and can have a nursery added if required.

In addition there are two sizes (900 pupil and 1,050 pupil) of the secondary school model - the Mondrian - which can be configured to deliver four different pedagogies (faculty, department, Year 7 base, mini-school)

All Sunesis designs are new-build only.

#### Costs

Costs given below are gross costs including fees, OH&P and an allowance for external works as defined based on a notional design. They do not include site-specific abnormalities, such as contamination. The base costs are adjusted according to location (based on BCIS indices).

#### Keynes

1FE: £2,200,000  
1FE+N: £2,300,000  
1.5FE+N: £3,000,000  
2FE+N: £3,600,000

#### Dewey

2FE: £4,300,000  
2FE+N: £4,500,000  
3FE: £5,300,000  
3FE+N: £5,500,000

#### Paxton

(note: nursery is a separate building)

1.5FE: £3,700,000  
1.5FE+N: £4,140,000  
2FE: £4,200,000  
2FE+N: £4,640,000

#### Newton

1FE: £3,300,000

#### Mondrian

900 place: £11,500,000  
1,050 place: £12,400,000  
FF&E costs to be confirmed.

#### Sustainability

Keynes: BREEAM very good, EPC A  
Dewey: BREEAM very good, EPC B  
Paxton: BREEAM Excellent, EPC A  
Newton: BREEAM very good, EPC B  
Mondrian: BREEAM very good, EPC B

Willmott Dixon says it is currently undertaking a full, detailed comparison exercise against the EFA design guidance

#### Space standards

Willmott Dixon says the design conforms to Building Bulletins and EFA baseline design guidance.

#### Compliance with EFA Output Specification

Willmott Dixon says it is currently undertaking a full, detailed comparison exercise against the EFA design guidance, but is able to confirm that Sunesis products either "meet, or exceed, all major requirements in this regard".

## 7/HIGHER AND FURTHER EDUCATION

### 7.1 DRIVERS FOR INVESTMENT IN THE UK'S HEFE ESTATE

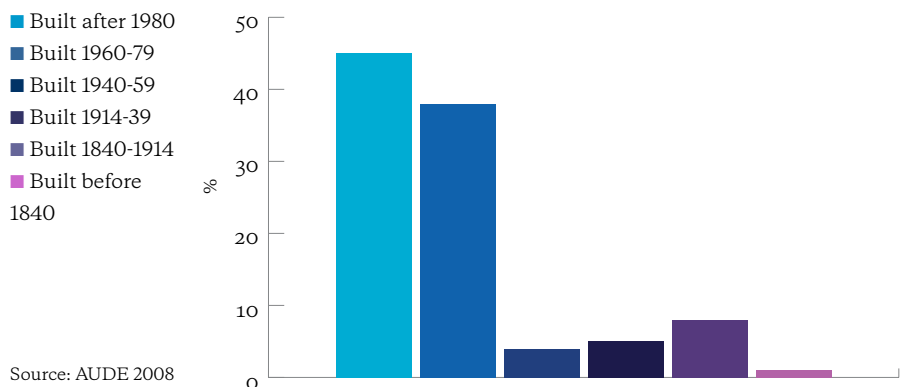
#### 7.1.1 CURRENT CONDITION OF THE UK UNIVERSITY ESTATE

Investment in the UK's university estate increased significantly during the 2000s, following a period of under-investment in the 1980s and 90s. A report by the Higher Education Funding Council for England (HEFCE) in 2010 found that the average amount of space deemed functionally suitable rose from 66% in 1999 to 83% in 2009. However, there remains a pressing need for development to address the legacy of under-investment in buildings, which despite recent spending has left many universities with outdated facilities and a significant backlog of maintenance and repair work. The need to renew premises has been exacerbated by changes in methods of learning and an increased emphasis on the quality of student experience, as well as a rise in numbers - over the last 10 years, the number of students being educated in HE institutions in the UK has risen by 28% to around 2.5 million.

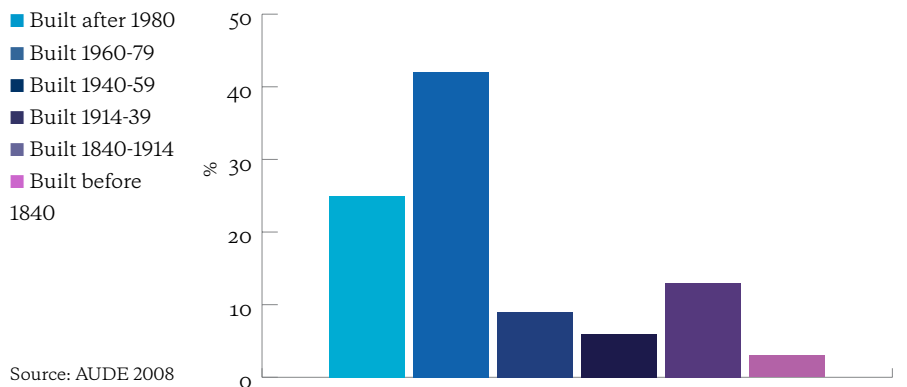
A study published by the Association of University Directors of Estates (AUDE) in 2008 found that more than 40% of England's university non-residential estate was built in the 1960s and 1970s, compared with 25% since 1980 (see figures 1 and 2). The problems associated with buildings in this era, including in relation to heating, ventilation, and panel cladding systems, coupled with a historic lack of investment in maintenance, have left the UK university estate as a whole in significant need of repair or rebuild. AUDE said in its report that "a conservative estimate of the replacement cost of all 1960s buildings within English university institutions is circa £11bn".

Although there has clearly been some progress on addressing this problem since the report's publication, the speed at which universities have been able to carry out development work has been constrained

[1] PERCENTAGE OF RESIDENTIAL BUILD IN UNIVERSITY ESTATE BY ERA



[2] PERCENTAGE OF NON-RESIDENTIAL BUILD IN UNIVERSITY ESTATE BY ERA



by recent cuts to national funding and by uncertainty around tuition fees, both of which have led to a degree of caution in procuring projects to update the estate. Seventy per cent of the university estates directors interviewed for this white paper still identified the legacy of a 1960s or 70s estate as a major factor in the need for development.

A further factor in the current make-up of the university estates contributing to the need for development work is the relatively high proportion of historic buildings compared with other sectors of the built environment. The AUDE survey found that almost 20% of the non-residential university estate in England was built before 1914, with around 10% of residential buildings being constructed in the same era. The desire to maintain iconic historic buildings while ensuring that they provide modern learning environments is a significant driver of renovation and extension projects in the sector.

### 7.1.2 TUITION FEES AS A DRIVER FOR INVESTMENT

The UK government's decision to increase tuition fees, and in particular the decision to raise the cap on fees to £9,000 from 2012-13, has led to a marked reduction in the number of students attending university. The latest available UCAS figures for 2012-13, published on 20 September, showed there had been 408,500 acceptances to UK courses from UK and EU students for 2012-13. This was a drop of 56,000, or 12%, compared with the same point in 2011-12. The biggest fall, of 14%, was in England, which experienced a reduction of 54,200 students (see figure 3).

This fall in the overall number of students, together with universities' reliance on fee income to address cutbacks in government funding, has led to increased competition to attract students in order to maximise income levels. This driver is likely to increase in 2013/14 and beyond as more universities opt to charge the highest possible fee levels: 94 HE institutions in England out of 122 that want to charge more than £6,000 will charge £9,000 for at least some courses next year, according to Office of Fair Access data published in July 2012. The average annual

### [3] ACCEPTANCES TO UK HE COURSES FOR 2012-13 BY REGION (UCAS)

Region	2012-13 acceptances	Change on 2011	% change
England	340,500	(54,200)	-14%
Wales	21,500	(3300)	-13%
Scotland	36,700	700	+2%
Northern Ireland	9700	200	+2%

tuition fee across those institutions for home and EU students is set to rise to £8,615, up from £8,527 in 2012-13.

Against this backdrop, the quality of university estates - including teaching areas and student accommodation - is a potential differentiator which institutions can use to increase their appeal to students. There is clear evidence to show that this is strongly recognised by universities, and is driving them to invest in development work. In research carried out by Wates, published in March 2012, attracting students was identified by 54% of universities as the top objective behind their current or next construction project.

Improving the quality of the university estate is seen as a route to attracting not only fee-paying UK students, but also increasing attractiveness to international students, who can pay more than double the fees of a UK student for courses. In the Wates research, 13% of respondents said the top objective underpinning their estates strategy was a desire to attract more international students, while 20% said it was attracting more UK students. A further 16% identified giving greater value for money for all students - an indirect driver for increasing student numbers - as the primary aim.

### 7.1.3 SUSTAINABILITY

Universities, as owners and occupiers of large estates, are under pressure from the government to reduce their carbon emissions as part of the national commitments to meet ambitious climate change reduction targets. This pressure has increased given the sector's expansion,

In research carried out by Wates, published in March 2012, attracting students was identified by 54% of universities as the top objective behind their current or next construction project

which has contributed to a dramatic rise in emissions: in 1990, carbon emissions from English universities totalled 2.5 million tonnes of carbon dioxide (MtCO<sub>2</sub>), and by 2005 this had risen by 33% to 3.34 MtCO<sub>2</sub>. Most of these emissions come from university estates, although the figures also include emissions from transport related to the universities.

The HE sector in England has committed to meeting government targets for total carbon reductions from direct emissions and the generation of electricity consumed by 34% by 2020 and 80% by 2050, against a 1990 baseline. Against a 2005 baseline, this is equivalent to a reduction of 43% by 2020 and 83% by 2050. In addition, HEFCE has set a sector-wide milestone of an 18% reduction by 2017 against 1990 levels. This latter target is equivalent to a 29% reduction by 2017 against a 2005 baseline.

In order to meet these targets, HEFCE has required each institution for which it provides funding to set its own carbon reduction strategy within the national targets.

## 7.2 DRIVERS FOR INVESTMENT IN THE UK'S FE ESTATE

### 7.2.1 CONDITION OF THE EXISTING FE ESTATE

The FE sector in England has been struggling with the burden of an outdated estate, much of it in poor condition, since the cancellation of the previous government's Building Colleges for the Future programme in March 2009 as a result of mismanagement and dramatic overspending. This programme, run by quango the Learning and Skills Council (LSC), was deemed necessary when the LSC was established in 2001 "to renew an estate that was too large, with much of it in poor condition and no longer fit for modern educational purposes" (Public Accounts Committee report, July 2009).

By March 2008, only half of the FE estate had been renewed through the initiative. When the LSC officially stopped the programme, 65 projects were working up

designs in order to pass the first hurdle of the approval process, while 79 had proceeded to detailed design. After review, just 14 were given funds to proceed, leaving 130 colleges in urgent need of improvement. Since then, more limited central funds have been made available for immediate, small-scale work, and to kickstart some larger projects, mainly through the Enhanced Renewal Grant (ERG) programme, which has provided £330m in funding since May 2010. A small proportion of colleges have also carried out work funded through borrowing or land sales, but there is a clear requirement for significant work to address the need established when the Building Colleges for the Future programme was created. In December 2012, the Department for Business, Innovation and Skills (BIS) reported that over half of colleges assess at least a third of their estate as poor or inoperable. Overall, it rated the condition of the entire FE estate as 33% excellent, 30% good, 33% poor and 4% inoperable. In addition, BIS identified a strong need for

rationalisation, saying a reduction of just 5% in the sector's floorspace could save £21m in annual operating and maintenance costs.

### 7.2.2 STUDENT NUMBERS IN FE

More than 3 million students are educated in colleges across the UK, according to the Association of Colleges, with 2 million in government-funded education in FE colleges. Government policy driving the study of vocational subjects, together with the effect of tuition fees on reducing the number of students attending university, are both likely to increase applications to college-based courses in the foreseeable future. This is likely to put pressure on estates, both in the direct provision of places and in adapting to meet demand for flexible and part-time learning.

### 7.2.3 ATTRACTING HE STUDENTS TO FE COLLEGES

FE colleges that offer recognised HE courses are eligible for funding from HEFCE for

#### [4] TOP 20 UNIVERSITY AND COLLEGE CLIENTS BY VALUE OF PROJECTS ON WHICH CONTRACTORS WERE APPOINTED (2011-12)\*

Ranking	Client	Location	Value of projects (£)	No of projects
1	Manchester Metropolitan University	Greater Manchester	180,000,000	2
2	Swansea University	West Glamorgan	101,800,000	2
3	University of Strathclyde	Strathclyde	97,050,000	6
4	University of Edinburgh	Lothian	92,750,000	9
5	Bradford College FE Corporation	West Yorkshire	90,000,000	2
6	University of Oxford	Oxfordshire	89,500,000	5
7	Highlands & Islands Enterprise (HIE)	Highlands	81,500,000	2
8	South East Essex College	Essex	71,900,000	2
9	University College London	London	46,450,000	6
10	University of Sheffield	South Yorkshire	45,500,000	11
11	Westminster University	London	43,500,000	5
12	University of Essex	Essex	42,900,000	2
13	University of Kent	Kent	42,850,000	9
14	Queen Mary University London	London	42,050,000	4
15	Calderdale College	West Yorkshire	41,500,000	2
16	University of Bristol	Avon	41,200,000	4
17	Bangor University	Gwynedd	36,500,000	4
18	Oxford Centre for Islamic Studies	Oxfordshire	32,000,000	2
19	Bath Spa University	Avon	30,000,000	1
20	University of Cambridge	Cambridgeshire	27,500,000	5

Source: Barbour ABI \*For methodology, see section 8.2

the students that they attract, and can also charge higher tuition fees for these courses. In a similar way to the HE sector, this factor, set against a constrained funding environment, has increased the importance of attracting HE students. A HESA survey included in a Universities UK report on education trends (October 2011) indicated that around 6% of the UK's HE students were taught in FE colleges. In the FE sector, there is a growing perception that poor estates could deter these sought-after HE students, given the fees involved, which is an added driver for investment in college buildings.

## 7.3 HEFE MARKET SIZE AND SPENDING TRENDS

### 7.3.1 SIZE AND LOCATION OF THE HEFE CLIENT BASE

There are currently 165 HE institutions in the UK, of which 115 are universities and the remainder are colleges that offer HE courses. In addition, 10 university colleges will be granted full university status from September 2013: the Arts University College at Bournemouth; Bishop Grosseteste University College Lincoln; Harper Adams University College, in Shropshire; Leeds Trinity University College; Newman University College, Birmingham; Norwich University College of the Arts; Royal Agricultural College in Gloucestershire; University College Birmingham; University College Falmouth; and University College Plymouth St Mark & St John.

There are 407 colleges in the UK. These comprise 341 in England (of which 246 are FE colleges and the remainder sixth-form colleges), 41 in Scotland, 19 in Wales and six in Northern Ireland (source: Association of Colleges).

### 7.3.2 HIGHEST SPENDING HEFE CLIENTS 2011-12 AND THEIR LOCATIONS

Figure 4 lists the top 20 spending university and college clients between September 2011 and September 2012.

### 7.3.3 NATIONAL SPENDING TRENDS IN HEFE

The total capital spend on the UK's HE estates, excluding maintenance, was £1.14bn in 2010-11, the most recent year for which figures are available, according to data from the Higher Education Statistics Agency. This included £262m on residential buildings and £880m on non-residential buildings.

The capital spend split across the UK is shown below:

2010-11	Non-residential	Residential
England	783.9m	223.0m
Wales	21.8m	16.7m
Scotland	54.2m	15.7m
N Ireland	20.3m	6.9m

Source: Higher Education Statistics Agency

The figures represent a fall in spending of £410m from 2009-10, in which £1.55bn was spent. Between the two periods there was a £354.3m drop in spend on residential projects (2009-10: £616.6m) and a fall of £55.3m on non-residential projects (2009-10: £935.5m).

2009-10	Non-residential	Residential
England	796.9m	346.4m
Wales	18.1m	4.2m
Scotland	98.2m	15.8m
N Ireland	22.3m	250.2m

Source: Higher Education Statistics Agency

This pattern of overall market decline between 2009 and 2011 is mirrored when the FE sector is taken into account. Data from Barbour ABI, detailing construction contracts awarded by universities and colleges across England, Wales and Scotland (data for Northern Ireland is unavailable) shows that in 2011 £2.5bn of work was awarded, compared with £3.2bn in 2010 and £4.0bn in 2009.

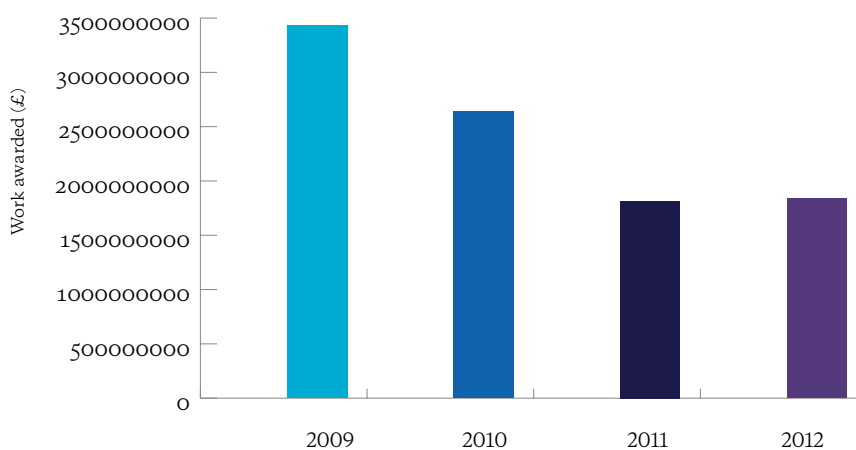
However, Barbour ABI data suggests that, across the market as a whole, the decline has levelled out in 2012. Contract award data for HEFE in the first three quarters of 2012 totalled £1.84bn, compared with £1.82bn at the same point in 2011, £2.64bn in 2010 and £3.43bn in 2009 (see figure 5).

## 7.4 FUNDING FOR HEFE BUILDING WORK 2012-15

### 7.4.1 PROJECTED TRENDS IN FUNDING SOURCES

There is an increasing reliance on self-financing of projects among both HE and FE institutions as a result of cuts to public sector funding streams. Among universities surveyed for this white paper, 80% said they expected to

[5] VALUE OF CONTRACT AWARDS IN HEFE IN THE UK FOR Q1-3 (2009-12)



Source: Barbour ABI

use elements of self-funding for future projects, with 60% using elements of central funding and 67% using private finance (see figure 6).

#### 7.4.2 PUBLIC SECTOR CAPITAL FUNDING FOR HEFE

##### 7.4.2.1 HEFCE FUNDING

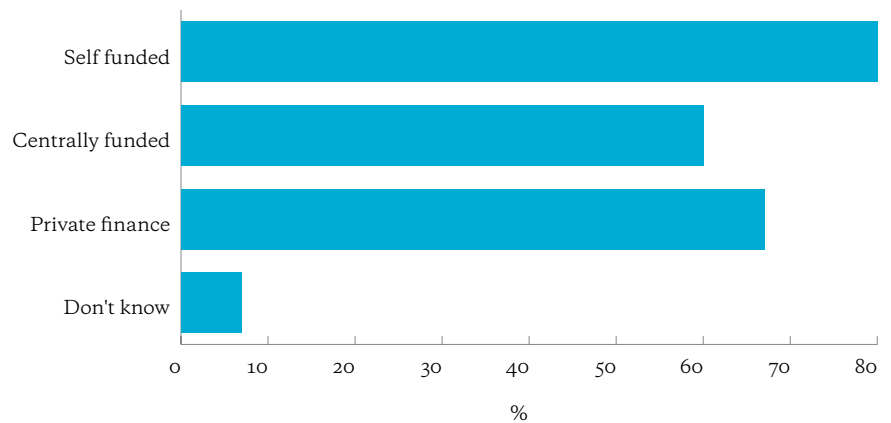
HEFCE, which provides government funding to 129 universities and HE colleges and 186 directly funded FE colleges in England, has a relatively small allocation of funds to distribute in the form of capital grant. This grant, which covers other capital costs such as IT as well as construction works, accounts for roughly 5% of HEFCE's annual budget, with the vast majority of overall spending being allocated to teaching. HEFCE, which receives its funding from the central government Department of Business Innovation and Skills (BIS) is allocated a budget for capital for each financial year (April-March), and distributes this to institutions on a financial year basis (unlike funding for teaching, which it distributes for each academic year).

HEFCE's budget for capital works was cut dramatically from March 2011 onwards, with the body given a budget of £314m for the financial year 2011-12 compared with £532m in 2010-11 (see figure 7). This represented a cut of 41%, which could have been even greater - the government revised its original allocations as part of its effort to provide a capital spending stimulus. In 2012-13 the total was £300m, and BIS has provided an indicative allocation for 2013-14 of £280m. A confirmed figure will be published later this winter.

##### 7.4.2.2 OTHER SOURCES OF PUBLIC FUNDING FOR UNIVERSITIES

In addition to direct funding from HEFCE, universities are also eligible to apply for other sources of national and European government funding for specific projects - usually to fund research facilities - in the form of regional development funding.

#### [6] HOW WILL YOUR PROJECTS BE FUNDED?



##### 7.4.2.3 ADDITIONAL PUBLIC SECTOR FUNDING FOR FE COLLEGES

Since May 2010, the government has been providing funding for FE capital through the Skills Funding Agency's Enhanced Renewal Grant programme. This provides grants for up to a third of a project's value, with a cap of £3m; colleges are expected to fund the remainder through their own sources. The third round of funding under the programme, released in late November 2012, includes £110m of government funds, to be supplemented by £302m from colleges to create a £400m programme of works. This will support developments at 56 colleges, with all developments to be procured and constructed in time for opening in September 2014.

Further, in the government's autumn statement in December 2012, it announced additional FE capital funding of £270m to be spent between 2013 and 2015. This will form part of a new £550m FE College Capital Investment Strategy over 2013-14 and 2014-15.

Taking all programmes of funding into account, the government will provide £469m in 2013-14 (£219m already allocated; £250m of new money under the Capital Investment Strategy) and £355m in 2014-15 (£20m of new money to support £280m of unallocated

money, both now under the Capital Investment Strategy; £55m already allocated and outside the strategy).

The investment will be managed and allocated by the Skills Funding Agency, which will allocate on the basis of building condition, functional suitability and scope for rationalisation. It will devolve some funding to project development, to help colleges with the costs of hiring consultants to develop capital strategies, and may allocate some funds to targeted programmes such as carbon reduction. The main funds will have a minimum project threshold of £3m. Expressions of interest must be submitted by March 2013 and decisions will be taken on the first phase of projects to be funded by 26 April 2013. An earlier decision will be taken on whether to fund 18 colleges that narrowly missed out on ERG3 funding.

##### 7.4.2.4 PUBLIC FUNDING FOR SIXTH-FORM COLLEGES

The Education Funding Agency provides government capital funding for sixth-form colleges through the Sixth-form College Capital Expansion Fund (SFC CEF) and 16-19 Demographic Growth Capital Fund (DGCF). The latest annual allocations, announced in June 2012, gave eight sixth-form colleges



[7] HEFCE BUDGETS FOR CAPITAL WORKS 2010-15

Capital budgets	2010-11 (£m)	2011-12 (£m)	2012-13 (£m)	2013-14 (£m)	2014-15 (£m)
Teaching capital (to HE institutions and directly funded FE colleges)	134	58	60	35	TBC
Research capital	282	202	149	86	112
High performance computing capital			26		
UK Research Partnership Investment Fund			20	120	160
Other capital initiatives	116	54	45	39	TBC
<b>Total</b>	<b>532</b>	<b>314</b>	<b>300</b>	<b>280</b>	<b>TBC</b>

(2013-14 and 2014-15 budgets are indicative allocations subject to confirmation in future grant letters.) Source: HEFCE

a share in CEF funding totalling £4m. The DGCF allocated £38.4m to a total of 66 providers, 38 of which were colleges.

7.4.3 SELF-FUNDING IN HE

With the reduction in government funding to universities for capital works, the ability of universities to self-finance projects, in part or in whole, is becoming increasingly important.

Although universities have experienced deep cuts to public sector funding, the total income of the HE sector in the UK has risen slightly over the past three years, from £25.4bn in 2008/9 to £26.8bn in 2009/10 and £27.6bn in 2010/11 (source: HESA). This is due mainly to increases in income from tuition fees and from providing additional services to communities. With more universities set to raise tuition fees, this is likely to offset the fall from a reduction in student numbers across the sector as a whole, and particularly in institutions that can combine high fee levels with continued success in attracting students.

Fundraising campaigns, both general and targeted, are also an increasingly common means of generating funding for building projects. UK universities secured £693m in philanthropic funds in 2010-11, up from £608m in 2009-10 (source: Ross-CASE survey into voluntary giving in HE). The level of income from fundraising varies dramatically between institutions, however. Oxford and

Cambridge universities secured 44% of this amount, with the remaining Russell Group universities obtaining just over a quarter (26%) of the total.

7.4.4 SELF-FUNDING IN FE

FE colleges tend to be in a weaker position to self-fund projects than universities due to lower fee income levels and a smaller asset base that they can use to generate funds. However, the sale of assets, loan or sale of buildings for community use and a rationalisation of estate are all strategies being used to increase available funding for projects, and government is increasingly making the ability to raise additional funds a criteria for eligibility for government funding.

As a result, skills minister Matthew Hancock said publicly, following the increased funding announced in the autumn statement, that he expects £1.5bn in new college construction projects to start in the next two years - which assumes just under £1bn will be provided by colleges through self-funding or private finance.

BIS has said it will generally expect colleges applying for new Capital Investment Strategy funds to provide two-thirds of project funding to every one-third provided by the government, with the government's contributions usually capped at £10m.

7.4.5 PRIVATE SECTOR FUNDING

7.4.5.1 BANK LOANS

Both HE and FE institutions are increasingly borrowing funds to support projects in the wake of cuts to public sector funding. Although it is easier for universities to do this than FE colleges given their higher income levels and asset bases, there are numerous recent examples of loans being successfully secured by FE providers to fund development, including among the 56 colleges that received central funding under the Enhanced Renewal Grant programme in November 2012.

7.4.5.2 BOND MARKETS

The combination of a reduction in capital grant and low long-term interest rates has meant that raising funds for capital projects from bond markets is seen increasingly as an attractive option by universities.

In July 2012 De Montfort University became the first institution to raise funding from private investors in this way, issuing a 30-year, £110m public bond. The bond, £20m of which will be held in reserve, gives De Montfort £90m to spend on "transforming the campus and improving the student experience", according to the university.

De Montfort has been followed by Cambridge, which issued a 40-year, £350m bond in 2012. The bond will fund

projects including a new laboratory for stem cell research and accommodation for postgraduate students. The university said in a statement ahead of the issue that the funds would be used “for general corporate purposes, including investment in research facilities, accommodation and other university assets.”

Market commentators anticipate that more universities will adopt this approach, particularly given the high confidence placed in the issues by credit ratings agencies. Moody’s awarded Cambridge a triple A rating as part of its bond issue process, and De Montfort was awarded an Aa1 rating (the second highest possible).

## 7.5 MARKET OPPORTUNITIES AND CHALLENGES

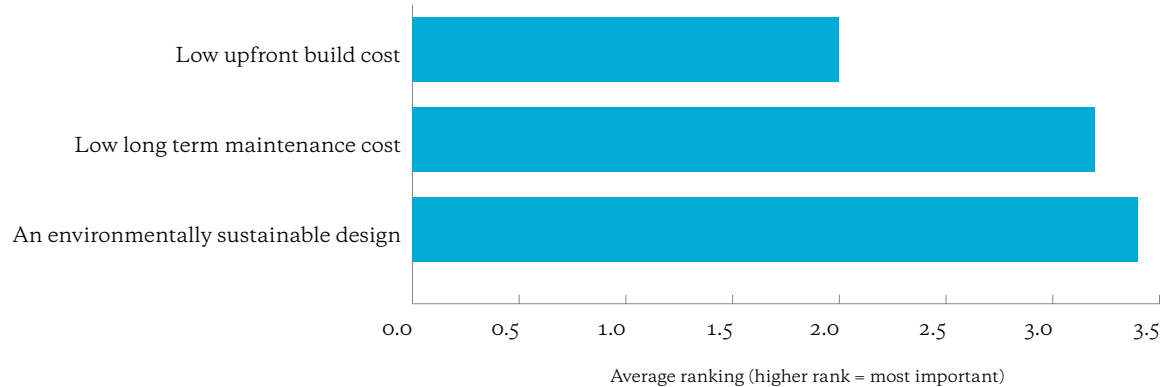
### 7.5.1 PROCUREMENT

A high proportion of clients in the HE and FE sectors tender projects through the OJEU process: because clients are part public-funded any project above around £4m must be tendered directly through OJEU, or through a framework set up using the OJEU process. The HE sector makes heavy use of frameworks, with the majority of universities operating their own framework arrangements. The frequency with which

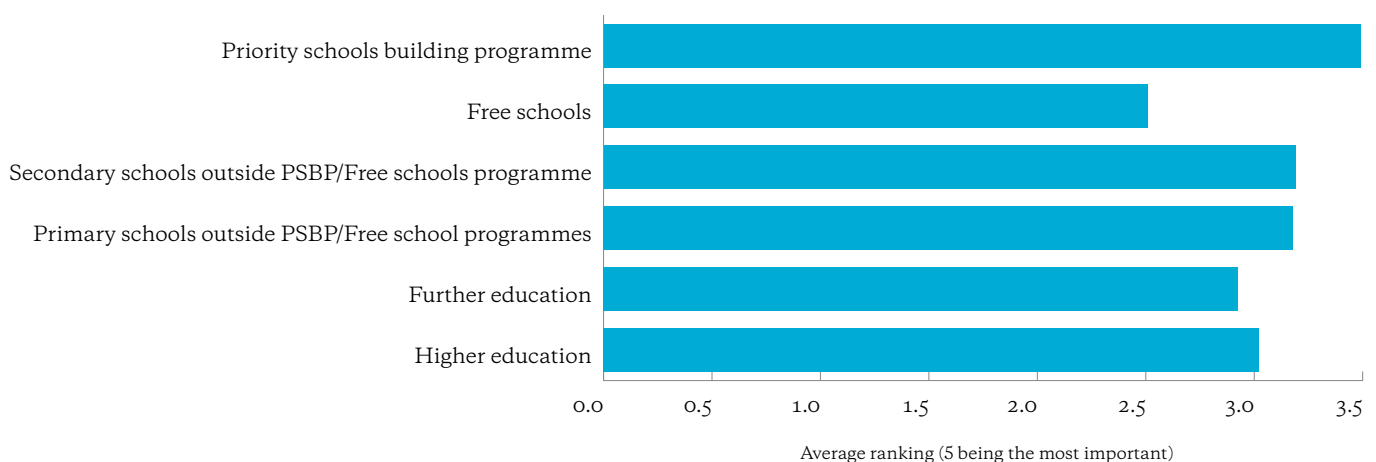
universities use these frameworks varies between institutions, with some procuring virtually all work through them but others using them far more selectively, alongside other procurement routes. While this will inevitably reduce opportunities with some clients, companies looking to increase market share should be encouraged by the fact that due to the number of institutions in the sector, the frequency of tenders for new or replacement frameworks is relatively high. A minority of universities also use frameworks managed by a third party, such as local government – usually for smaller scale works.

Another point to note is that the reduction in the proportion of central funding for

#### [8] PRIORITIES OF HEFE CLIENTS IN BUILDING DEVELOPMENTS, RANKED IN ORDER OF IMPORTANCE



#### [9] EDUCATION MARKETS, RANKED IN ORDER OF IMPORTANCE BY CONSTRUCTION COMPANIES



universities may mean that they can avoid using the OJEU process for even large schemes in future, if they can prove that this reduction is so significant they should not be treated as publicly funded bodies for tendering purposes, either in general or for individual projects. Imperial College London is already adopting this approach. This could pave the way for more private tendering processes in the sector.

#### 7.5.2 UNDERSTANDING HEFE CLIENTS' NEEDS AND DESIGN PRIORITIES

There is a strong trend among clients in this sector to take a whole-life approach to buildings, rather than a short-term view on cost. This approach is closely tied in with a strong emphasis on environmental sustainability. Across the HEFE sector as a whole, when interviewees were asked to rank various factors in order of importance to them in university buildings, an environmentally sustainable design scored an average of 3.4 out of 5 for importance, and low long-term maintenance cost 3.2 out of 5. By comparison, a low upfront build cost scored 2 out of 5 (see figure 8).

HE clients interviewed for this white paper saw sustainability as a particular priority in future building development. Although FE clients also valued low long-term maintenance costs, this group were more likely to attach a higher importance to low upfront build cost than HE clients, reflecting the greater level of difficulty the sector generally has in attracting funds for projects.

#### 7.6 PERCEPTION OF HEFE MARKETS AMONG CONSTRUCTION FIRMS

A survey of almost 200 construction companies that are active in the education sector for this white paper showed that FE and HE are generally regarded as slightly lower priorities than most school building programmes (see figure 9). When construction companies were asked to rank markets in order of priority to their company, HE was given an average rating of 3.02 out of 5 (5 being the highest) and FE a ranking

of 2.91. This meant both were lower than the Priority Schools Building Programme (top with 3.49) and primary schools (3.18).

The marginal difference between these rankings indicates that both FE and HE are considered viable areas of opportunity by most firms in the industry.

### 7.7 CLIENT PROFILES

#### 7.7.1 BRADFORD COLLEGE

##### What they say:

"It is important to have a good quality estate. Teaching and learning resource is the most important thing, but a poor quality estate can put people off - especially with high fees for HE students. It is also important that the estate is well configured for learning and the digital age, as we are moving from classroom-based learning to more innovative methods.

**'It is important that the estate is well configured for learning and the digital age, as we are moving from classroom-based learning to more innovative methods'**

"Our estate needs something doing, which is why we are doing something about it. But one of the big challenges is justifying incurring expense just to maintain quality when students aren't really aware of the benefit, through planned maintenance such as reroofing buildings. Students only really see the benefit when buildings are upgraded, and it's difficult to get funding for other projects."

**Andy Welsh, vice principal of corporate services**

**Current and forthcoming projects include:**

## THE VALUE OF THE UNIVERSITY ESTATE IN ATTRACTING STUDENTS: CLIENTS' VIEWS (1)

**Simon Harding-Roots, chief operating officer, Imperial College, London:** "The quality of our estate is very important in terms of attracting students, irrespective of the increase in tuition fees, as it directly impacts on the student experience. For us, 'quality' is very much about efficiency and functionality of space.

**Andrew Burgess, director of facilities management, Loughborough University:** "To Loughborough, the estate is vital in attracting students. We are a market town and a campus-based university - we don't have the attractions of a big city, and students who come here want a campus experience. The quality of our estate is one of our top ten brand messages.

**Professor John Brookes, vice-chancellor, Manchester Metropolitan University:** "The quality of our university estate is very important to us. It goes beyond attracting students to its impact on them when they are here. The functionality is key. It's easy to demonstrate that well designed, efficient buildings pay off in an educational sense. Investing in its estate is almost the most logical thing a university can do."

**Fiona Nixon, deputy head of estates, Swansea University:** "The quality of our estate is absolutely critical in attracting students. The first impression that students have of the university is on open days and on arrival at the start of term and the condition of the estate plays a big part in that."

- £50m new-build on-site teaching accommodation to replace existing facilities. Project manager Turner & Townsend, architect Bond Bryan, contractor BAM.

- Potential £3m scheme to refurbish another teaching block - seeking funding. Tender for architects forthcoming.

- School owned by the college to be rebuilt under Priority Schools Building Programme. No project team appointed.

#### Construction procurement

The majority of schemes are procured through OJEU. The college also uses frameworks managed by third parties, for example regional framework Yorbuild.

#### Project finance

Schemes will be dependent on grant funding.

### 7.7.2 EXETER UNIVERSITY

#### What they say:

“As a destination university we think it is absolutely imperative to invest in our estate. It’s vital. We think that the grounds and the built environment have a significant impact on student choice. We are very lucky in our landscape environment, with trees and lakes, and have just invested £300m in our estate in projects including a new centrepiece to the campus (the Forum). We have also invested £110m over the last three years in student residential accommodation with our partner, UPP. So overall the condition of the estate is good, but we still have a lot of stock from the 1960s and 70s which requires significant investment.”

**Geoff Pringle, director of campus services**

#### Construction pipeline

Pringle says: “We’ve just had a £300m tranche of our masterplan, and we have two further tranches planned. The second part is a £100m investment programme that we’re working through, and the third is another significant investment.”

#### Current and forthcoming projects include:

- Projects will include refurbishment, long-term maintenance and new build, of areas

## THE VALUE OF THE UNIVERSITY ESTATE IN ATTRACTING STUDENTS: CLIENTS’ VIEWS (2)

**Bath Spa University spokesperson:** “It is very important that we are able to offer excellent academic facilities and residential accommodation to our students, which is why we are undertaking a programme of significant development. Each of our campuses is maintained to a very high standard. They are each visually stunning and give our students space to be creative. The biggest challenge with our current estate is that as the student body continues to grow it is important we are able to accommodate this and provide additional facilities, especially in a competitive higher education sector.”

**Patrick Finch, director of estates, University of Bristol:** “We now consider the quality of our estate very important in attracting students, particularly given the tuition fee environment. We’re realistic that the main reason students come is our academic reputation, but we place much more store on the estate now than we would have done ten years ago.”

**Angus Currie, director of estates and buildings, Edinburgh University:** “The university has always recognised the importance of its estate in attracting students. We are competing for the best staff and students, and therefore the infrastructure available to support them is very important. We have invested substantially in our estate over the last ten years and we are moving steadily in a positive direction.

**Simon Neale, director of estate management, Essex University:** “The University sees the estate as absolutely fundamental, from the Vice chancellor to the maintenance staff. For Essex it is about raising quality and making sure we are world class in every respect - that is a primary driver of the Estates Department. Obviously the quality of the estate is not the primary driver in attracting students from the UK and overseas, but as an enabler and attractor it is absolutely fundamental. If it is not high quality it can be a serious detractor.”

including space for academic staff, teaching facilities and laboratories.

- Development of infrastructure works including gas mains infrastructure, electrical infrastructure and IT.

#### Construction procurement

The university has framework agreements in place and will use these and OJEU to procure future construction work.

#### Project finance

The university intends to use substantial amounts of self-funding, generated by increasing student numbers, international recruitment and research activities. It is also considering private finance.

### 7.7.3 QUEEN MARY, UNIVERSITY OF LONDON

#### What they say:

“The quality of the university’s estate is very important in attracting students. The quality of the student experience is really affected by the quality of buildings, both teaching and residential. The current condition of our estate is pretty good, as we’ve had a 15-year period of investment in new build and refurbishment and we’ve prioritised key schemes. We’ve also tried to employ good architects as we see high-quality design as an investment.”

“Because we are based in London, there are particular challenges and opportunities around making sure we use the land available in a way that is both aesthetically

pleasing and as efficient as possible.”

**Professor Philip Ogden, senior adviser to the vice principal**

### **Construction pipeline**

The university spent around £250m on its estate between 1995 and 2010, and then a further £50m since 2010. Over the next two years, it is planning mainly major refurbishments of 1960s and 1970s buildings, with its main new-build project being a graduate centre. Ogden said that longer term projects are “dependent on growth in the university”.

### **Current and forthcoming projects include:**

- £36m new-build graduate centre in Mile End. Feasibility study done and architect Wilkinson Eyre appointed.

### **Construction procurement**

The university estates department employs its own project managers as part of a project office, and then takes on external project managers and architects on a project-by-project basis through open competition. The university does have existing frameworks but assesses its procurement options for each project.

### **Project finance**

The university intends to fund future projects mainly through a combination of self-funding and borrowing.

‘Because we are based in London, there are particular challenges and opportunities around making sure we use the land available in a way that is both aesthetically pleasing and as efficient as possible’

## 8/METHODOLOGIES

### 8.1 SURVEY METHODOLOGIES

The survey data in this research covering local authorities, school professionals and construction firms was obtained by an online survey of individuals working within schools, local authority education departments and education specialists within the construction industry. The survey, which elicited 228 responses, was sent to previous attendees of the Building Future Education conference, owned by Building's parent company UBM, registered users of Building's education newsletter and UBM's education group on LinkedIn. The number of responses for each question varied, but overall, the breakdown of respondents was:

- Local authorities / schools 32
- Architects 47
- Consultants 59
- Contractors 45
- Manufacturer / product supplier 45

The survey was carried out in August and September 2012.

The survey data relating to university and further education clients was collated from telephone and email interviews with university and college clients conducted during November 2012. The total number of responses varied between questions, but averaged around 20.

### 8.2 RANKING LISTS

The top architects, consultants and contractors are ranked by the number of projects awarded between September 2011 and September 2012. The project values given are the total value of schemes they were appointed to, as opposed to the value in fees to them. The rankings are given for schools work (including both primary and secondary), and also for all education, which includes the addition of universities and colleges work. Under Barbour ABI's data methodology, a contract is counted as "won"

once a contractor has also been appointed to the scheme, as it is then deemed more likely to go ahead. A good description of these rankings would be the "most active" firms in the sector over that time period.

The top clients list (figure 4, section 7.2) ranks university and college clients in England, Scotland and Wales by the value of projects to which a contractor was appointed during 2011-2012.

### 8.3 PUPIL PLACE SHORTAGE DATA

Data on the number of school places currently available and forecast numbers of pupils was obtained from the Department for Education's school capacity survey, carried out in May 2011 - the latest available data as of 9 January 2013. The number of school places relates to local authority maintained schools only, and the forecast number of pupils excludes those expected to be educated in city technology colleges, academies or new schools / extensions funded through section 106 agreements. The data has been pooled at local authority level, so where local authorities are expecting a surplus of places in some schools and a shortfall in others, the data has been aggregated to give an overall picture at local authority level. Shortfalls have been calculated by subtracting the number of existing pupil places from the forecast number of pupils in any given year. Secondary data relates to national curriculum year groups 7-13.

## 9/APPENDICES

### [A] MOST ACTIVE ARCHITECTS IN THE SCHOOLS SECTOR BY CONTRACTS AWARDED, SEPT 2011-SEPT 2012\*

Ranking	Company	Projects of schemes appointed on	Value(£)	Ranking	Company	Projects of schemes appointed on	Value(£)
1	NPS Property Consultants	41	85,306,228	41=	Synergy Plus	4	7,900,000
2	WS Atkins	22	64,853,000	41=	Cunliffes	4	13,732,500
3	Mace	16	33,271,500	41=	Aberdeenshire Council	4	2,500,000
4	Hampshire County Council	14	34,850,000	41=	NVB Architects	4	8,200,000
5	Mouchel Group	13	25,547,000	41=	Feilden Clegg Bradley Architects	4	35,000,000
6	Capita Group	13	33,247,500	41=	London Borough of Enfield	4	3,800,000
7=	Jacobs	12	16,005,000	41=	PHP Architects	4	3,135,000
7=	Aedas	12	62,720,000	41=	Wernick Hire	4	1,332,500
9	EC Harris	10	25,400,000	41=	White Design Associates	4	20,800,000
10=	Architect Design Partnership	9	22,784,348	41=	Central Site Accommodation	4	1,750,000
10=	Jestic Whiles & Associates	9	112,060,000	41=	Wirral Metropolitan Borough Council	4	4,475,000
10=	Watts & Partners	9	5,780,000	41=	City of Edinburgh Council	4	7,500,000
13=	JM Architects	7	88,200,000	41=	Farrell & Clark	4	5,650,000
13=	Suffolk County Council	7	7,500,000	41=	The Bush Consultancy	4	3,900,000
13=	Lancashire County Council	7	14,502,000				
13=	Tweed Nuttall Warburton	7	8,793,750				
13=	Nicholas Hare Architects	7	76,400,000				
13=	DHP	7	18,312,500				
13=	GSS Architecture	7	13,550,000				
20=	Lee Evans Partnership	6	9,800,000				
20=	Bailey Partnership	6	9,234,000				
20=	Ingenium Archial	6	36,250,000				
20=	Wood Goldstraw & Yorath	6	8,550,000				
20=	Portakabin	6	950,000				
20=	Pick Everard	6	15,281,500				
20=	Quattro Design	6	10,080,000				
20=	Nightingale Associates	6	31,800,000				
20=	Building Design Partnership	6	59,500,000				
20=	Ryder (Architecture Design and Management)	6	53,812,500				
20=	Hunter & Partners	6	31,700,000				
20=	Holmes Miller	6	43,350,000				
32=	DKA	5	8,300,000				
32=	Wilby & Burnett	5	5,110,000				
32=	Cassidy & Ashton	5	11,985,000				
32=	Gloucestershire County Council	5	7,430,000				
32=	Meadowcroft Griffin	5	6,442,500				
32=	Built Offsite	5	2,635,000				
32=	Watkins Gray International	5	44,155,600				
32=	A Studio Architecture	5	38,605,000				
32=	Barker & Associates	5	16,527,500				
41=	CPMG Architects	4	21,917,500				
41=	Stride Treglown	4	27,325,000				

Source: Barbour ABI

\* See section 8.2 for full methodology for rankings

(B) MOST ACTIVE CONSULTANTS IN THE SCHOOLS SECTOR BY CONTRACTS AWARDED, SEPT 2011-SEPT 2012\*

Ranking	Company	Projects of schemes appointed on	Value(£)
1	NPS Property Consultants	40	176,628,684
2	Mace	26	119,621,500
3	Turner & Townsend	22	61,998,000
4	WS Atkins	21	173,897,500
5	Gardiner & Theobald	18	134,550,000
6=	Ramboll UK	17	228,000,000
6=	AECOM	17	128,370,000
8=	EC Harris	16	85,100,000
8=	Jacobs	16	54,730,000
10=	Capita Group	15	103,752,500
10=	Mouchel Group	15	79,347,000
10=	Curtins Consulting	15	161,526,000
13=	Mott MacDonald Group	14	145,190,000
13=	Synergy Plus	14	37,935,000
13=	Gleeds	14	30,635,000
16	URS Global	13	135,350,000
17	Faithful & Gould	11	56,200,000
18=	Price & Myers	10	31,102,500
18=	Couch Perry & Wilkes	10	57,500,000
18=	Jones King Partnership	10	49,630,000
18=	Hoare Lea	10	39,650,000
18=	Davis Langdon	10	110,520,000
23=	Hampshire County Council	9	54,800,000
23=	Pick Everard	9	29,934,500
23=	Arup	9	168,700,000
26=	Hulley & Kirkwood Consulting Engineers	8	45,500,000
26=	Building Services Design	8	11,950,000
28=	Sweett Group	7	72,915,000
28=	WSP Consulting Engineers	7	110,500,000
30=	Cardiff County Council	6	18,550,000
30=	Aberdeenshire Council	6	53,000,000
30=	Lancashire County Council	6	26,750,000
30=	AKS Ward Partnership	6	20,950,000
30=	Ridge & Partners	6	28,800,000
30=	Hydrock Structures 1	6	29,090,000
30=	DHP (UK)	6	21,025,000
30=	Brown & Wallace	6	40,650,000
30=	Pinnacle ESP	6	15,270,000
30=	Waterman Group	6	28,200,000
30=	JPP Consulting	6	9,750,000
30=	White Young Green	6	64,100,000
30=	Wallace Whittle & Partners	6	37,250,000

Ranking	Company	Projects of schemes appointed on	Value(£)
43=	Skanska UK	5	13,500,000
43=	Thomas & Adamson	5	30,500,000
43=	Kier Construction	5	23,607,500
43=	Hadland Manning Bullock & Partners	5	11,400,000
43=	Wood Goldstraw & Yorath	5	13,800,000
43=	Currie & Brown UK	5	8,750,000
43=	Will Rudd Davidson	5	33,000,000
43=	WA Fairhurst & Partners	5	52,000,000
43=	Gary Gabriel Associates	5	5,950,000
43=	William G Dick Partnership	5	12,470,000
43=	Baqus Nigel Rose	5	6,475,000

Source: Barbour ABI



[C] MOST ACTIVE CONTRACTORS IN THE SCHOOLS SECTOR BY CONTRACTS AWARDED, SEPT 2011-SEPT 2012\*

Ranking	Company	Projects of schemes appointed on	Value(£)
1	Morgan Sindall	41	127,885,000
2	Kier Construction	39	280,355,000
3	Willmott Dixon Construction	34	196,901,500
4	Mansell	24	76,316,848
5	BAM Construction	19	260,655,000
6=	Balfour Beatty	18	165,487,500
6=	Carillion	18	150,820,000
6=	ISG	18	37,262,750
9	Lakehouse Contracts	15	17,614,000
10	Wates Construction	14	89,130,000
11=	Leadbitter	13	170,045,000
11=	T&B (Contractors)	13	15,950,000
13=	Galliford Try Construction South	12	58,559,000
13=	Portakabin	12	2,082,500
13=	Interserve	12	66,100,000
13=	Lend Lease Construction (EMEA)	12	132,500,000
17=	Ashe Construction	11	17,670,000
17=	Wernick Hire	11	3,490,000
19	Built Offsite	10	6,131,500
20=	Farnrise Construction	8	12,100,000
20=	Feltham Construction	8	24,380,000
22=	Elliott Group	7	6,536,250
22=	Buxton Building Contractors	7	23,850,000
22=	Beard	7	7,350,000
22=	Skanska UK	7	56,500,000
26=	Midas Group	6	22,937,500
26=	Elliott Group	6	3,151,750
26=	SDC Construction Group	6	3,955,000
26=	GF Tomlinson Group	6	24,212,500
26=	Neilcott Construction	6	9,000,000
26=	Speller Metcalfe (Malvern)	6	6,990,000
26=	Conlon Construction	6	12,510,000
26=	Shepherd Construction	6	77,800,000
34=	Thomas Vale Construction	5	18,100,000
34=	Gee Construction	5	8,490,000
34=	Servacomm Redhall	5	4,020,000
34=	George Hurst & Sons	5	6,358,000
34=	Walter Carefoot & Sons	5	3,875,000
34=	Gelder Group	5	6,521,250
34=	Bardsley Construction	5	20,000,000
34=	Keepmoat	5	12,650,000
34=	Central Site Accommodation	5	3,750,000
43=	Quinn (London)	4	10,600,000
43=	Central Building Contractors (Glasgow)	4	15,247,828
43=	Laing O'Rourke	4	36,500,000
43=	Dawnus Construction	4	23,100,000

Ranking	Company	Projects of schemes appointed on	Value(£)
43=	Herbert H Drew & Son	4	2,700,000
43=	RG Carter	4	6,600,000
43=	Bouygues (UK)	4	51,547,500
43=	Robertson Group	4	87,500,000
43=	Barnes Construction	4	4,150,000
43=	Spetisbury Construction	4	2,650,000
43=	Ideal Building Systems	4	780,000
43=	Woodbar	4	2,850,000
43=	Ryearch	4	2,800,000
43=	Keepmoat	4	9,200,000
43=	GB Building Solutions	4	41,395,000
43=	McLaughlin & Harvey Construction	4	20,400,000
43=	Osborne	4	27,900,000

Source: Barbour ABI

[D] MOST ACTIVE ARCHITECTS IN ALL EDUCATION BY CONTRACTS AWARDED, SEPT 2011-SEPT 2012\*

Ranking	Company	Projects of schemes appointed on	Value(£)
1	NPS Property Consultants	46	92,456,228
2	WS Atkins	27	70,263,000
3	The Bond Bryan Partnership	19	209,660,000
4	Capita Group	18	54,247,500
5=	Hampshire County Council	17	36,750,000
5=	Aedas	17	105,320,000
7	Mace	16	33,271,500
8	Ingenium Archial	15	99,350,000
9	Mouchel Group	14	30,547,000
10=	Jacobs	13	17,505,000
10=	Architect Design Partnership	13	62,984,348
10=	Building Design Partnership	13	221,000,000
10=	EC Harris	13	53,800,000
14=	GSS Architecture	11	17,400,000
14=	Pick Everard	11	52,281,500
14=	Wilson Mason & Partners	11	18,300,000
17=	Ryder (Architecture Design and Management)	10	105,912,500
17=	Jestico Whiles & Associates	10	123,060,000
17=	Nightingale Associates	10	42,300,000
20=	Watts & Partners	9	5,780,000
20=	Bailey Partnership	9	11,734,000
22=	Stride Treglown	8	41,625,000
22=	HLM Architects	8	107,500,000
22=	Suffolk County Council	8	7,800,000
22=	Faulkner Browns	8	62,750,000
22=	Hawkins Brown Architects	8	43,207,500
22=	JM Architects	8	94,700,000
28=	Sheppard Robson	7	259,000,000
28=	Hunter & Partners	7	33,900,000
28=	CPMG Architects	7	24,527,500

Ranking	Company	Projects of schemes appointed on	Value(£)
28=	Built Offsite	7	3,150,000
28=	Cassidy & Ashton	7	13,185,000
28=	Lancashire County Council	7	14,502,000
28=	Tweed Nuttall Warburton	7	8,793,750
28=	Quattro Design	7	10,580,000
28=	Holmes Miller	7	74,350,000
28=	Nicholas Hare Architects	7	76,400,000
28=	DHP	7	18,312,500
28=	Howarth Litchfield Partnership	7	9,400,000
28=	GHM Rock Townsend	7	35,260,000
41=	Taylor Young	6	34,800,000
41=	Farrell & Clark	6	6,800,000
41=	Lee Evans Partnership	6	9,800,000
41=	Wood Goldstraw & Yorath	6	8,550,000
41=	Feilden Clegg Bradley Architects	6	42,000,000
41=	Portakabin	6	950,000
41=	RH Partnership Architects	6	21,625,000
41=	DKA	6	9,300,000
41=	RMJM	6	42,707,500
41=	Ainsley Gommon Architects	6	7,222,500

Source: Barbour ABI

\* See section 8.2 for full methodology for rankings

[E] MOST ACTIVE CONSULTANTS IN ALL EDUCATION BY CONTRACTS AWARDED, SEPT 2011-SEPT 2012\*

Ranking	Company	Projects of schemes appointed on	Value(£)	Ranking	Company	Projects of schemes appointed on	Value(£)
1	Turner & Townsend	70	427,748,000	32=	Ridge & Partners	10	66,300,000
2	NPS Property Consultants	46	186,828,684	34	JPP Consulting	9	16,900,000
3	Gardiner & Theobald	45	553,800,000	35=	WA Fairhurst & Partners	8	67,037,500
4	Ramboll UK	38	631,400,000	35=	AKS Ward Partnership	8	59,850,000
5	AECOM	37	543,370,000	35=	Hulley & Kirkwood Consulting Engineers	8	45,500,000
6	Davis Langdon	35	348,270,000	35=	Bradshaw Gass & Hope	8	28,975,000
7	Gleeds	33	113,385,000	35=	AA Projects	8	16,000,000
8	WS Atkins	28	247,647,500	35=	Alan Johnston Partnership	8	12,550,000
9	Mace	27	122,921,500	41=	BAM Construction	7	151,800,000
10	Capita Group	26	299,802,500	41=	White Young Green	7	76,100,000
11=	Arup	25	490,000,000	41=	Harley Haddow & Partners	7	51,300,000
11=	Curtins Consulting	25	202,146,000	41=	Cardiff County Council	7	47,050,000
13	EC Harris	21	177,000,000	41=	Wallace Whittle & Partners	7	44,287,500
14	Hoare Lea	20	122,425,000	41=	Franklin & Andrews	7	42,500,000
15=	Couch Perry & Wilkes	19	194,360,000	41=	Elliott Wood Partnership	7	21,835,000
15=	Mott MacDonald Group	19	166,590,000	41=	Pinnacle ESP	7	15,970,000
15=	Sweett Group	19	154,915,000	41=	Woodley Coles Partnership	7	12,700,000
18=	Faithful & Gould	18	101,660,000	41=	WT Hills	7	12,070,000
18=	Jacobs	18	69,230,000				
20	Synergy Plus	17	43,185,000				
21=	URS Global	16	153,850,000				
21=	Mouchel Group	16	84,347,000				
21=	Currie & Brown UK	16	16,381,000				
24	WSP Consulting Engineers	15	140,200,000				
25	Northcroft	14	36,707,500				
26=	Pick Everard	13	87,934,500				
26=	Jones King Partnership	13	57,830,000				
28=	Hampshire County Council	12	59,700,000				
28=	Price & Myers	12	47,002,500				
30=	Waterman Group	11	54,300,000				
30=	Building Services Design	11	16,100,000				
32=	Buro Happold	10	128,900,000				

Source: Barbour ABI

\* See section 8.2 for full methodology for rankings

[F] MOST ACTIVE CONTRACTORS IN ALL EDUCATION BY CONTRACTS AWARDED, SEPT 2011-SEPT 2012\*

Ranking	Company	Projects of schemes appointed on	Value(£)	Ranking	Company	Projects of schemes appointed on	Value(£)
1	Morgan Sindall	59	221,662,500	27=	Beard	9	8,700,000
2	Kier Construction	55	404,980,000	27=	GF Tomlinson Group	9	33,962,500
3	Willmott Dixon Construction	44	278,751,500	34=	Surgo Construction	8	14,840,000
4	Mansell	43	141,295,348	34=	Elliott Group	8	5,401,750
5=	BAM Construction	31	483,625,000	34=	Shepherd Construction	8	99,800,000
5=	Balfour Beatty	31	260,137,500	34=	Quinn (London)	8	16,850,000
7	ISG	29	58,392,750	34=	John Graham (Dromore)	8	35,400,000
8	Interserve	24	136,085,000	34=	Amiri Construction (Fareham)	8	14,350,000
9	Carillion	21	207,600,000	40=	Buxton Building Contractors	7	23,850,000
10	Wates Construction	20	149,247,500	40=	Osborne	7	58,425,000
11	Leadbitter	19	202,145,000	40=	Bray & Slaughter	7	8,800,000
12=	T&B (Contractors)	16	16,750,000	40=	Thomas Vale Construction	7	18,900,000
12=	Lakehouse Contracts	16	18,114,000	40=	John Turner Construction Group	7	17,200,000
14	Portakabin	14	2,317,500	40=	Shaylor Group	7	16,550,000
15=	Lend Lease Construction (EMEA)	13	187,500,000	40=	Hutton Construction	7	46,695,000
15=	Galliford Try Construction South	13	65,559,000	40=	Cardy Construction	7	13,000,000
17=	Midas Group	12	40,963,500	40=	Conlon Construction	7	14,010,000
17=	Ashe Construction	12	18,470,000	40=	Longcross Group	7	11,700,000
17=	SDC Construction Group	12	26,205,000	50=	Bowmer & Kirkland	6	28,900,000
17=	Built Offsite	12	6,646,500	50=	Gee Construction	6	10,490,000
17=	Wernick Hire	12	3,990,000	50=	WW Martin (Thanet)	6	11,850,000
22=	Speller Metcalfe (Malvern)	11	39,040,000	50=	Central Building Contractors (Glasgow)	6	18,297,828
22=	Elliott Group	11	10,558,750	50=	Gelder Group	6	7,521,250
24=	Vinci Construction UK	10	127,765,000	50=	George Hurst & Sons	6	6,858,000
24=	GB Building Solutions	10	65,795,000	50=	RG Carter	6	13,400,000
24=	Neilcott Construction	10	19,600,000	50=	Walter Carefoot & Sons	6	4,775,000
27=	Laing O'Rourke	9	183,000,000	50=	Bardsley Construction	6	24,500,000
27=	Skanska UK	9	131,500,000				
27=	Farnrise Construction	9	12,600,000				
27=	Feltham Construction	9	29,380,000				
27=	Miller Construction	9	65,500,000				

[G] LOCAL AUTHORITY PRIMARY SCHOOL PLACE SHORTAGES, BY HIGHEST CALCULATED FORECAST SHORTFALL 2013/14\*

	Local authority	No of places		Forecast pupil nos		Calculated shortfall 2013/14
		May 2011		2012/13	2013/14	
1	Brent	23,013		26,846	27,883	4,870
2	Central Bedfordshire	18,007		21,764	22,447	4,440
3	Waltham Forest	20,551		23,942	24,951	4,400
4	Barking and Dagenham	19,615		22,219	23,877	4,262
5	Northumberland	19,011		22,821	23,095	4,084
6	Bristol, City of	29,724		31,508	33,318	3,594
7	Bedford	10,231		13,218	13,641	3,410
8	Newham	29,184		31,191	32,577	3,393
9	Lewisham	21,015		23,196	24,282	3,267
10	Hounslow	18,473		19,950	21,033	2,560
11	Redbridge	24,619		26,057	27,055	2,436
12	Manchester	40,821		40,933	42,968	2,147
13	Bexley	19,262		20,683	21,348	2,086
14	Sutton	13,450		14,521	15,216	1,766
15	Croydon	28,753		29,490	30,510	1,757
16	Ealing	27,015		27,653	28,770	1,755
17	Slough	12,459		13,468	14,188	1,729
18	Enfield	27,945		28,969	29,652	1,707
19	Leeds	60,977		60,093	62,578	1,601
20	Bradford	50,389		51,040	51,951	1,562
21	Hertfordshire	93,030		91,646	94,259	1,229
22	Windsor and Maidenhead	9,392		10,284	10,614	1,222
23	Leicester	28,064		28,108	29,228	1,164
24	Merton	15,212		15,458	16,292	1,080
25	Trafford	18,238		18,644	19,263	1,025
26	Wokingham	13,335		13,657	14,358	1,023
27	Birmingham	101,194		99,472	102,110	916
28	Kingston upon Thames	11,558		11,957	12,451	893
29	Tower Hamlets	21,909		22,220	22,685	776
30	Hillingdon	24,605		24,286	25,373	768
31	Richmond upon Thames	13,929		14,240	14,689	760
32	Luton	20,719		20,779	21,468	749
33	Wandsworth	17,271		17,204	17,984	713
34	Coventry	27,424		27,112	28,121	697
35	Worcestershire	40,825		40,634	41,516	691
36	Milton Keynes	24,069		23,212	24,713	644
37	Greenwich	20,883		20,604	21,509	626
38	Bournemouth	11,200		11,157	11,811	611
39	Lambeth	20,257		20,252	20,861	604
40	Suffolk	52,522		52,453	53,120	598
41	Hammersmith and Fulham	9,647		9,711	10,175	528
42	Havering	19,464		19,301	19,967	503
43	Isle of Wight	8,681		8,986	9,163	482
44	Southampton	17,642		17,361	18,067	425
45	Bracknell Forest	9,434		9,304	9,829	395
46	Kirklees	36,549		36,081	36,895	346
47	Plymouth	19,349		19,070	19,689	340

	Local authority	No of places	Forecast pupil nos		Calculated shortfall
		May 2011	2012/13	2013/14	2013/14
48	Nottingham	23,121	22,413	23,438	317
49	York	13,559	13,158	13,851	292
50	Blackpool	11,302	11,289	11,575	273
51	Westminster	10,678	10,723	10,889	211
52	Dorset	27,671	27,328	27,852	181
53	Swindon	18,070	17,663	18,237	167
54	Haringey	21,006	20,772	21,140	134
55	North Somerset	15,748	15,566	15,873	125
56	Salford	18,800	18,250	18,919	119
57	Darlington	8,544	8,439	8,646	102
58	Bromley	24,436	24,024	24,519	83
59	Rochdale	19,205	18,909	19,256	51
60	Brighton and Hove	18,436	17,962	18,462	26
61	City of London	210	210	210	0
62	Blackburn with Darwen	14,569	14,258	14,544	-25
63	Stockport	22,656	22,011	22,606	-50
64	Southend-on-Sea	13,659	13,182	13,543	-116
65	Isles of Scilly	285	150	147	-138
66	Somerset	38,279	37,565	38,128	-151
67	Camden	11,034	10,790	10,870	-164
68	Bolton	25,121	24,261	24,956	-165
69	Hackney	17,648	16,986	17,478	-170
70	Sandwell	29,321	28,173	29,151	-170
71	Southwark	22,920	21,897	22,710	-210
72	Kensington and Chelsea	6,898	6,609	6,681	-217
73	Peterborough	17,643	16,870	17,374	-269
74	Torbay	9,788	9,264	9,468	-320
75	Stockton-on-Tees	16,259	15,506	15,884	-375
76	Stoke-on-Trent	20,973	19,990	20,574	-399
77	Islington	13,922	13,159	13,516	-406
78	Hartlepool	8,117	7,592	7,710	-407
79	Wigan	25,469	24,428	25,031	-438
80	Cambridgeshire	48,197	45,986	47,708	-489
81	North Tyneside	16,529	15,625	16,040	-489
82	Bath and North East Somerset	12,876	12,135	12,346	-530
83	Poole (3)	10,593	9,806	10,054	-539
84	St. Helens	14,572	13,801	14,010	-562
85	Thurrock	15,162	13,895	14,592	-570
86	Halton	10,745	9,941	10,142	-603
87	Oxfordshire	49,956	48,136	49,348	-608
88	Reading	11,583	10,642	10,964	-619
89	Calderdale	19,239	18,192	18,611	-628
90	Solihull	18,608	17,503	17,965	-643
91	Bury	15,947	15,114	15,298	-649
92	Tameside	19,200	17,936	18,547	-653
93	Rutland	3,227	2,523	2,547	-680
94	North East Lincolnshire	13,513	12,479	12,805	-708

	Local authority	No of places May 2011	Forecast pupil nos 2012/13	2013/14	Calculated shortfall 2013/14
95	Derby	21,678	20,436	20,963	-715
96	Portsmouth	15,398	14,230	14,521	-877
97	Barnsley	19,128	17,786	18,216	-912
98	South Gloucestershire	23,247	21,685	22,328	-919
99	West Berkshire	12,947	11,952	12,028	-919
100	Walsall	25,150	23,729	24,192	-958
101	Staffordshire	63,960	61,960	63,001	-959
102	Leicestershire	51,849	49,746	50,874	-975
103	North Lincolnshire	14,057	12,726	13,008	-1,049
104	Surrey	83,215	80,302	82,163	-1,052
105	Kingston Upon Hull, City of	20,938	19,489	19,837	-1,101
106	Newcastle upon Tyne	20,591	18,961	19,473	-1,118
107	Telford and Wrekin	15,207	13,791	13,934	-1,273
108	East Sussex	37,690	35,637	36,414	-1,276
109	Warrington	18,241	16,683	16,923	-1,318
110	Medway	23,792	21,856	22,472	-1,320
111	Oldham	23,608	21,873	22,261	-1,347
112	Harrow	20,178	18,279	18,779	-1,399
113	South Tyneside	12,469	10,813	11,057	-1,412
114	Middlesbrough	13,842	12,169	12,426	-1,416
115	West Sussex	61,462	58,556	60,035	-1,427
116	Buckinghamshire	42,443	40,195	40,964	-1,479
117	Cheshire East	28,263	26,435	26,781	-1,482
118	Rotherham	23,043	21,286	21,530	-1,513
119	Sheffield	42,825	40,247	41,276	-1,549
120	Sunderland	22,915	20,790	21,232	-1,683
121	Cheshire West and Chester	26,751	24,696	25,065	-1,686
122	Wolverhampton	21,990	19,931	20,209	-1,781
123	Gateshead	15,857	13,777	14,004	-1,853
124	Redcar and Cleveland	12,364	10,421	10,509	-1,855
125	Hampshire	102,825	98,042	100,953	-1,872

	Local authority	No of places	Forecast pupil nos		Calculated shortfall
		May 2011	2012/13	2013/14	2013/14
126	Sefton	21,933	19,843	20,026	-1,907
127	Herefordshire	14,483	12,200	12,450	-2,033
128	Wirral	26,908	24,465	24,805	-2,103
129	Liverpool	35,573	32,733	33,210	-2,363
130	Dudley	27,458	24,792	24,899	-2,559
131	Knowsley	15,299	12,345	12,557	-2,742
132	Doncaster	27,449	23,979	24,631	-2,818
133	Warwickshire	43,932	40,142	41,112	-2,820
134	Shropshire	22,914	19,994	20,075	-2,839
135	Northamptonshire	60,972	56,242	57,779	-3,193
136	Gloucestershire	46,563	42,500	43,286	-3,277
137	Devon	54,753	50,542	51,439	-3,314
138	Wakefield	28,691	24,906	25,297	-3,394
139	Nottinghamshire	63,650	58,683	60,179	-3,471
140	Cumbria	38,331	34,408	34,764	-3,567
141	East Riding of Yorkshire	26,993	23,272	23,290	-3,703
142	Lincolnshire	55,534	50,571	51,434	-4,100
143	Cornwall	40,979	36,383	36,619	-4,360
144	Wiltshire	40,475	36,276	36,011	-4,464
145	Kent	117,697	110,961	113,221	-4,476
146	Lancashire	100,445	92,341	95,445	-5,000
147	North Yorkshire	48,591	42,144	42,934	-5,657
148	Durham	42,912	36,652	37,025	-5,887
149	Norfolk	64,116	57,284	58,189	-5,927
150	Derbyshire	61,907	55,163	55,827	-6,080
151	Essex	114,573	105,510	107,694	-6,879
152	Barnet	26,037	25,600	126	-25,911

Source: School Capacity Survey and School Census, DfE

\* See section 8.3 for full methodology for rankings



[H] PRIMARY SCHOOL PLACE FORECASTS AND PROJECTED SHORTFALLS BY LOCAL AUTHORITY IN ENGLAND 2013/14-2015/16\*

Local authority	No of places May 2011	Forecast pupil nos 2013/14	Calculated shortfall 2013/14	Forecast pupil nos 2014/15	Calculated shortfall 2014/15	Forecast pupil nos 2015/16	Calculated shortfall 2015/16
Brent	23,013	27,883	4,870	28,651	5,638	29,247	6,234
Barking and Dagenham	19,615	23,877	4,262	25,476	5,861	26,879	7,264
Barnet	26,037	126	-25,911	27,322	1,285	28,108	2,071
Barnsley	19,128	18,216	-912	18,634	-494	19,046	-82
Bath and North East Somerset	12,876	12,346	-530	12,552	-324	12,833	-43
Bedford	10,231	13,641	3,410	13,979	3,748	14,297	4,066
Bexley	19,262	21,348	2,086	21,973	2,711	22,536	3,274
Birmingham	101,194	102,110	916	104,516	3,322	106,631	5,437
Blackburn with Darwen	14,569	14,544	-25	14,858	289	15,263	694
Blackpool	11,302	11,575	273	11,923	621	12,111	809
Bolton	25,121	24,956	-165	25,554	433	26,115	994
Bournemouth	11,200	11,811	611	12,419	1,219	13,203	2,003
Bracknell Forest	9,434	9,829	395	10,411	977	11,032	1,598
Bradford	50,389	51,951	1,562	52,956	2,567	54,037	3,648
Brighton and Hove	18,436	18,462	26	18,714	278	19,034	598
Bristol, City of	29,724	33,318	3,594	34,788	5,064	36,461	6,737
Bromley	24,436	24,519	83	24,848	412	25,092	656
Buckinghamshire	42,443	40,964	-1,479	41,712	-731	42,278	-165
Bury	15,947	15,298	-649	15,394	-553	15,470	-477
Calderdale	19,239	18,611	-628	18,990	-249	19,119	-120
Cambridgeshire	48,197	47,708	-489	49,072	875	50,193	1,996
Camden	11,034	10,870	-164	10,990	-44	11,080	46
Central Bedfordshire	18,007	22,447	4,440	22,992	4,985	23,582	5,575
Cheshire East	28,263	26,781	-1,482	26,935	-1,328	26,974	-1,289
Cheshire West and Chester	26,751	25,065	-1,686	25,368	-1,383	25,569	-1,182
City of London	210	210	0	210	0	210	0
Cornwall	40,979	36,619	-4,360	36,606	-4,373	36,453	-4,526
Coventry	27,424	28,121	697	29,276	1,852	30,256	2,832
Croydon	28,753	30,510	1,757	31,350	2,597	32,130	3,377
Cumbria	38,331	34,764	-3,567	34,869	-3,462	34,963	-3,368
Darlington	8,544	8,646	102	8,753	209	8,818	274
Derby	21,678	20,963	-715	21,286	-392	21,533	-145
Derbyshire	61,907	55,827	-6,080	56,080	-5,827	56,652	-5,255
Devon	54,753	51,439	-3,314	52,072	-2,681	52,507	-2,246
Doncaster	27,449	24,631	-2,818	25,153	-2,296	25,595	-1,854
Dorset	27,671	27,852	181	28,236	565	24,524	-3,147
Dudley	27,458	24,899	-2,559	25,032	-2,426	25,041	-2,417
Durham	42,912	37,025	-5,887	37,387	-5,525	37,625	-5,287
Ealing	27,015	28,770	1,755	29,929	2,914	31,122	4,107
East Riding of Yorkshire	26,993	23,290	-3,703	23,418	-3,575	23,403	-3,590
East Sussex	37,690	36,414	-1,276	37,122	-568	37,567	-123
Enfield	27,945	29,652	1,707	30,077	2,132	30,330	2,385
Essex	114,573	107,694	-6,879	109,796	-4,777	111,315	-3,258
Gateshead	15,857	14,004	-1,853	14,148	-1,709	14,260	-1,597
Gloucestershire	46,563	43,286	-3,277	43,653	-2,910	46,731	168

Local authority	No of places May 2011	Forecast pupil nos 2013/14	Calculated shortfall 2013/14	Forecast pupil nos 2014/15	Calculated shortfall 2014/15	Forecast pupil nos 2015/16	Calculated shortfall 2015/16
Greenwich	20,883	21,509	626	22,387	1,504	23,268	2,385
Hackney	17,648	17,478	-170	17,820	172	18,119	471
Halton	10,745	10,142	-603	10,421	-324	10,712	-33
Hammersmith and Fulham	9,647	10,175	528	10,598	951	10,983	1,336
Hampshire	102,825	100,953	-1,872	103,424	599	105,103	2,278
Haringey	21,006	21,140	134	21,429	423	21,710	704
Harrow	20,178	18,779	-1,399	19,154	-1,024	19,485	-693
Hartlepool	8,117	7,710	-407	7,825	-292	7,911	-206
Havering	19,464	19,967	503	20,517	1,053	20,958	1,494
Herefordshire	14,483	12,450	-2,033	12,650	-1,833	12,750	-1,733
Hertfordshire	93,030	94,259	1,229	96,194	3,164	97,634	4,604
Hillingdon	24,605	25,373	768	26,252	1,647	27,086	2,481
Hounslow	18,473	21,033	2,560	22,127	3,654	23,009	4,536
Isle of Wight	8,681	9,163	482	9,331	650	9,505	824
Isles of Scilly	285	147	-138	140	-145	130	-155
Islington	13,922	13,516	-406	13,811	-111	14,068	146
Kensington and Chelsea	6,898	6,681	-217	6,728	-170	6,756	-142
Kent	117,697	113,221	-4,476	114,999	-2,698	116,356	-1,341
Kingston Upon Hull, City of	20,938	19,837	-1,101	20,339	-599	20,540	-398
Kingston upon Thames	11,558	12,451	893	12,887	1,329	13,136	1,578
Kirklees	36,549	36,895	346	37,581	1,032	38,228	1,679
Knowsley	15,299	12,557	-2,742	12,663	-2,636	12,858	-2,441
Lambeth	20,257	20,861	604	21,486	1,229	22,130	1,873
Lancashire	100,445	95,445	-5,000	98,077	-2,368	100,964	519
Leeds	60,977	62,578	1,601	65,159	4,182	67,082	6,105
Leicester	28,064	29,228	1,164	30,284	2,220	31,203	3,139
Leicestershire	51,849	50,874	-975	51,819	-30	52,233	384
Lewisham	21,015	24,282	3,267	25,496	4,481	26,584	5,569
Lincolnshire	55,534	51,434	-4,100	52,163	-3,371	52,163	-3,371
Liverpool	35,573	33,210	-2,363	33,719	-1,854	34,391	-1,182
Luton	20,719	21,468	749	21,967	1,248	22,451	1,732
Manchester	40,821	42,968	2,147	44,829	4,008	46,548	5,727
Medway	23,792	22,472	-1,320	22,965	-827	23,244	-548
Merton	15,212	16,292	1,080	17,133	1,921	17,794	2,582
Middlesbrough	13,842	12,426	-1,416	12,717	-1,125	12,817	-1,025
Milton Keynes	24,069	24,713	644	26,295	2,226	27,865	3,796
Newcastle upon Tyne	20,591	19,473	-1,118	19,977	-614	20,383	-208
Newham	29,184	32,577	3,393	33,635	4,451	34,741	5,557
Norfolk	64,116	58,189	-5,927	58,548	-5,568	58,837	-5,279
North East Lincolnshire	13,513	12,805	-708	13,022	-491	13,267	-246
North Lincolnshire	14,057	13,008	-1,049	13,170	-887	13,213	-844
North Somerset	15,748	15,873	125	16,137	389	16,336	588
North Tyneside	16,529	16,040	-489	16,370	-159	16,744	215
North Yorkshire	48,591	42,934	-5,657	43,654	-4,937	44,512	-4,079
Northamptonshire	60,972	57,779	-3,193	59,444	-1,528	61,122	150

Local authority	No of places May 2011	Forecast pupil nos 2013/14	Calculated shortfall 2013/14	Forecast pupil nos 2014/15	Calculated shortfall 2014/15	Forecast pupil nos 2015/16	Calculated shortfall 2015/16
Northumberland	19,011	23,095	4,084	23,169	4,158	23,159	4,148
Nottingham	23,121	23,438	317	24,438	1,317	25,503	2,382
Nottinghamshire	63,650	60,179	-3,471	61,471	-2,179	62,363	-1,287
Oldham	23,608	22,261	-1,347	22,195	-1,413	22,264	-1,344
Oxfordshire	49,956	49,348	-608	50,006	50	50,424	468
Peterborough	17,643	17,374	-269	17,816	173	17,990	347
Plymouth	19,349	19,689	340	20,212	863	20,901	1,552
Poole	10,593	10,054	-539	10,398	-195	9,033	-1,560
Portsmouth	15,398	14,521	-877	14,782	-616	14,939	-459
Reading	11,583	10,964	-619	11,211	-372	11,387	-196
Redbridge	24,619	27,055	2,436	27,928	3,309	28,661	4,042
Redcar and Cleveland	12,364	10,509	-1,855	10,622	-1,742	10,600	-1,764
Richmond upon Thames	13,929	14,689	760	15,057	1,128	15,404	1,475
Rochdale	19,205	19,256	51	19,569	364	19,750	545
Rotherham	23,043	21,530	-1,513	21,820	-1,223	22,094	-949
Rutland	3,227	2,547	-680	2,592	-635	2,596	-631
Salford	18,800	18,919	119	19,702	902	20,438	1,638
Sandwell	29,321	29,151	-170	29,833	512	30,528	1,207
Sefton	21,933	20,026	-1,907	20,167	-1,766	20,252	-1,681
Sheffield	42,825	41,276	-1,549	42,113	-712	42,996	171
Shropshire	22,914	20,075	-2,839	20,126	-2,788	20,210	-2,704
Slough	12,459	14,188	1,729	14,876	2,417	15,500	3,041
Solihull	18,608	17,965	-643	18,039	-569	18,105	-503
Somerset	38,279	38,128	-151	38,487	208	38,816	537
South Gloucestershire	23,247	22,328	-919	22,814	-433	23,347	100
South Tyneside	12,469	11,057	-1,412	11,468	-1,001	11,264	-1,205
Southampton	17,642	18,067	425	19,002	1,360	19,420	1,778
Southend-on-Sea	13,659	13,543	-116	13,875	216	14,204	545
Southwark	22,920	22,710	-210	23,454	534	24,150	1,230
St. Helens	14,572	14,010	-562	14,172	-400	14,323	-249
Staffordshire	63,960	63,001	-959	64,147	187	64,898	938
Stockport	22,656	22,606	-50	23,181	525	23,634	978
Stockton-on-Tees	16,259	15,884	-375	16,238	-21	16,500	241
Stoke-on-Trent	20,973	20,574	-399	21,104	131	21,954	981
Suffolk	52,522	53,120	598	52,533	11	52,337	-185
Sunderland	22,915	21,232	-1,683	21,515	-1,400	21,819	-1,096
Surrey	83,215	82,163	-1,052	83,459	244	84,498	1,283
Sutton	13,450	15,216	1,766	15,710	2,260	16,183	2,733
Swindon	18,070	18,237	167	18,728	658	19,151	1,081
Tameside	19,200	18,547	-653	19,146	-54	19,816	616
Telford and Wrekin	15,207	13,934	-1,273	14,003	-1,204	14,056	-1,151
Thurrock	15,162	14,592	-570	15,308	146	15,892	730
Torbay	9,788	9,468	-320	9,608	-180	9,703	-85
Tower Hamlets	21,909	22,685	776	23,154	1,245	23,689	1,780
Trafford	18,238	19,263	1,025	19,754	1,516	20,291	2,053
Wakefield	28,691	25,297	-3,394	25,629	-3,062	25,748	-2,943
Walsall	25,150	24,192	-958	24,590	-560	24,927	-223
Waltham Forest	20,551	24,951	4,400	25,966	5,415	26,775	6,224

Local authority	No of places May 2011	Forecast pupil nos 2013/14	Calculated shortfall 2013/14	Forecast pupil nos 2014/15	Calculated shortfall 2014/15	Forecast pupil nos 2015/16	Calculated shortfall 2015/16
Wandsworth	17,271	17,984	713	18,663	1,392	19,242	1,971
Warrington	18,241	16,923	-1,318	17,261	-980	17,454	-787
Warwickshire	43,932	41,112	-2,820	41,876	-2,056	41,876	-2,056
West Berkshire	12,947	12,028	-919	12,012	-935	11,964	-983
West Sussex	61,462	60,035	-1,427	60,922	-540	61,614	152
Westminster	10,678	10,889	211	11,053	375	11,182	504
Wigan	25,469	25,031	-438	25,494	25	25,860	391
Wiltshire	40,475	36,011	-4,464	38,354	-2,121	39,084	-1,391
Windsor and Maidenhead (3)	9,392	10,614	1,222	10,897	1,505	11,134	1,742
Wirral	26,908	24,805	-2,103	24,991	-1,917	25,047	-1,861
Wokingham	13,335	14,358	1,023	15,024	1,689	15,570	2,235
Wolverhampton	21,990	20,209	-1,781	20,434	-1,556	20,710	-1,280
Worcestershire	40,825	41,516	691	42,264	1,439	42,650	1,825
York	13,559	13,851	292	14,456	897	15,102	1,543

Source: School Capacity Survey and School Census, DfE

\* See section 8.3 for full methodology for rankings

[1] LOCAL AUTHORITY SECONDARY SCHOOL PLACES BY HIGHEST CALCULATED FORECAST SHORTFALL 2013/14\*

	Local authority	No of places May 2011	Forecast pupil nos 2012/13	2013/14	Calculated shortfall 2013/14
1	Hammersmith and Fulham	7,676	9,145	9,362	1,686
2	Redbridge	21,774	23,080	22,565	791
3	Sutton	17,131	17,359	17,328	197
4	Wokingham	10,278	10,257	10,441	163
5	Waltham Forest	14,745	14,717	14,802	57
6	Barking and Dagenham	14,522	14,128	14,545	23
7	City of London	-	-	-	0
8	Isles of Scilly	-	104	102	0
9	Slough	10,807	10,550	10,762	-45
10	Kingston upon Thames	10,393	10,251	10,284	-109
11	Tower Hamlets	15,410	15,008	15,262	-148
12	Poole	9,071	8,867	8,852	-219
13	Rutland	3,051	2,670	2,719	-332
14	Haringey	14,651	13,575	14,309	-342
15	Lambeth	11,787	11,357	11,441	-346
16	Southend-on-Sea	13,532	13,263	13,168	-364
17	Harrow	12,209	11,856	11,841	-368
18	Newham	19,198	18,589	18,756	-442
19	Brighton and Hove	13,043	12,195	12,479	-564
20	Milton Keynes	19,139	17,961	18,553	-586
21	Calderdale	16,253	15,676	15,661	-592
22	Darlington	6,380	5,827	5,775	-605
23	Solihull	18,248	17,518	17,636	-612
24	Camden	10,440	9,730	9,770	-670
25	Brent	20,767	19,846	20,037	-730
26	Kensington and Chelsea	4,731	3,892	3,986	-745
27	Ealing	18,749	17,894	17,978	-771
28	York	10,714	9,935	9,918	-796
29	Westminster	10,325	9,248	9,507	-818
30	Reading	7,549	6,616	6,722	-827
31	Croydon	23,060	22,226	22,224	-836
32	Trafford	18,173	16,957	17,330	-843
33	Hounslow	17,149	16,366	16,295	-854
34	Bracknell Forest	7,522	6,573	6,667	-855
35	Richmond upon Thames	8,021	6,956	7,160	-861
36	Buckinghamshire	36,167	35,309	35,296	-871
37	Hartlepool	6,433	5,693	5,543	-890
38	Merton	10,020	8,991	9,106	-914
39	Bromley	23,083	22,373	22,125	-958
40	Oldham	16,897	16,070	15,917	-980
41	North Somerset	13,744	12,775	12,722	-1,022
42	Thurrock	9,732	8,901	8,704	-1,028
43	Telford and Wrekin	12,086	10,964	10,877	-1,209
44	Luton	14,538	12,902	13,275	-1,263
45	Dudley	20,289	19,167	19,020	-1,269
46	Derby	17,427	16,229	16,121	-1,306

	Local authority	No of places May 2011	Forecast pupil nos 2012/13	2013/14	Calculated shortfall 2013/14
47	Blackpool	8,667	7,581	7,324	-1,343
48	Hackney	12,387	10,967	11,043	-1,344
49	West Berkshire	13,157	11,898	11,797	-1,360
50	Blackburn with Darwen	10,695	9,362	9,329	-1,366
51	Plymouth	18,499	17,289	17,101	-1,398
52	Bristol, City of	20,760	19,069	19,351	-1,409
53	Tameside	15,126	13,907	13,697	-1,429
54	Bury	11,846	10,614	10,373	-1,473
55	Halton	9,004	7,440	7,509	-1,495
56	St. Helens	11,575	10,092	10,040	-1,535
57	Bradford	37,757	35,514	36,175	-1,582
58	North East Lincolnshire	11,052	9,506	9,420	-1,632
59	Torbay	9,857	8,363	8,213	-1,644
60	Peterborough	15,183	13,608	13,511	-1,672
61	Windsor and Maidenhead	11,207	9,455	9,527	-1,680
62	Gloucestershire	41,356	39,827	39,658	-1,698
63	Birmingham	71,485	69,621	69,745	-1,740
64	Havering	17,924	16,427	16,183	-1,741
65	West Sussex	49,034	47,109	47,261	-1,773
66	Greenwich	15,116	13,171	13,289	-1,827
67	Wandsworth	13,225	11,369	11,394	-1,831
68	Leicester	19,130	17,290	17,275	-1,855
69	Bath and North East Somerset	14,041	12,270	12,176	-1,865
70	Sandwell	22,075	20,297	20,198	-1,877
71	Herefordshire	10,989	9,300	9,100	-1,889
72	Rochdale	13,671	11,994	11,727	-1,944
73	Rotherham	20,411	18,711	18,432	-1,979
74	Stockton-on-Tees	12,408	10,638	10,414	-1,994
75	Portsmouth	10,510	8,631	8,515	-1,995
76	Bournemouth	11,223	9,381	9,203	-2,020
77	Warrington	15,261	13,276	13,217	-2,044
78	Islington	9,891	7,771	7,795	-2,096
79	Gateshead	12,838	10,973	10,681	-2,157
80	Lewisham	15,596	13,254	13,416	-2,180
81	Knowsley	8,503	6,572	6,317	-2,186
82	Bolton	20,085	18,048	17,838	-2,247
83	Shropshire	18,782	16,608	16,467	-2,315
84	Middlesbrough	10,208	8,053	7,877	-2,331
85	Southampton	12,416	10,228	10,077	-2,339
86	Coventry	23,056	20,701	20,696	-2,360
87	Enfield	24,585	22,306	22,218	-2,367
88	Southwark	16,443	13,851	14,059	-2,384
89	Swindon	13,689	11,488	11,303	-2,386
90	Newcastle upon Tyne	18,312	15,681	15,798	-2,514
91	Cheshire East	23,593	21,578	21,049	-2,544
92	North Tyneside	14,673	12,143	12,026	-2,647
93	North Lincolnshire	11,969	9,439	9,246	-2,723

	Local authority	No of places	Forecast pupil nos		Calculated shortfall
		May 2011	2012/13	2013/14	2013/14
94	Wolverhampton	17,666	15,055	14,913	-2,753
95	Salford	13,328	10,715	10,572	-2,756
96	Barnsley	14,579	11,730	11,612	-2,967
97	Wakefield	23,127	20,468	20,120	-3,007
98	Sefton	21,158	18,519	18,149	-3,009
99	Redcar and Cleveland	11,426	8,735	8,400	-3,026
100	South Tyneside	10,643	7,902	7,606	-3,037
101	Stoke-on-Trent	15,506	12,527	12,407	-3,099
102	Medway	21,529	18,713	18,387	-3,142
103	Walsall	23,267	20,252	20,099	-3,168
104	Hillingdon	22,244	18,856	19,069	-3,175
105	Cheshire West and Chester	22,957	20,291	19,781	-3,176
106	East Riding of Yorkshire	24,728	21,845	21,552	-3,176
107	Warwickshire	35,828	33,076	32,555	-3,273
108	Sheffield	32,129	29,386	28,810	-3,319
109	Barnet	25,810	22,275	22,447	-3,363
110	Wigan	21,341	18,410	17,913	-3,428
111	Manchester	28,176	24,414	24,713	-3,463
112	Bexley	22,515	19,139	18,954	-3,561
113	East Sussex	30,363	27,134	26,683	-3,680
114	Surrey	62,493	59,141	58,609	-3,884
115	Stockport	17,758	14,128	13,781	-3,977
116	Wiltshire	34,268	30,240	30,139	-4,129
117	Devon	45,409	41,661	41,172	-4,237
118	South Gloucestershire	21,135	17,440	16,895	-4,240
119	Sunderland	19,801	16,105	15,556	-4,245
120	Doncaster	23,030	19,239	18,726	-4,304
121	Kingston Upon Hull, City of	17,581	13,139	13,037	-4,544
122	Cornwall	34,778	30,963	30,219	-4,559
123	Leeds	49,263	44,680	44,443	-4,820

	Local authority	No of places	Forecast pupil nos		Calculated shortfall
		May 2011	2012/13	2013/14	2013/14
124	Cambridgeshire	37,207	32,474	32,322	-4,885
125	Nottingham	18,883	14,167	13,987	-4,896
126	Cumbria	36,258	31,979	31,328	-4,930
127	Kirklees	29,190	24,287	24,223	-4,967
128	Bedford	16,124	11,213	11,144	-4,980
129	Wirral	26,183	21,575	21,177	-5,006
130	Liverpool	33,711	29,003	28,425	-5,286
131	Isle of Wight	13,865	8,346	8,181	-5,684
132	Leicestershire	49,328	43,475	43,596	-5,732
133	Lincolnshire	52,052	47,234	46,034	-6,018
134	Oxfordshire	43,715	37,192	37,485	-6,230
135	Somerset	33,917	28,298	27,649	-6,268
136	Derbyshire	51,129	45,992	44,856	-6,273
137	Durham	35,078	29,245	28,720	-6,358
138	Norfolk	54,758	49,595	48,212	-6,546
139	Dorset	33,186	26,703	26,444	-6,742
140	Central Bedfordshire	25,022	17,990	18,217	-6,805
141	Worcestershire	39,612	33,332	32,731	-6,881
142	Northamptonshire	54,790	45,987	45,800	-8,990
143	North Yorkshire	46,787	38,154	37,764	-9,023
144	Hertfordshire	91,076	80,698	81,192	-9,884
145	Kent	109,094	99,632	98,683	-10,411
146	Nottinghamshire	58,232	48,493	47,436	-10,796
147	Lancashire	77,999	67,768	67,127	-10,872
148	Hampshire	78,437	68,568	67,445	-10,992
149	Essex	96,850	86,820	85,715	-11,135
150	Staffordshire	62,799	52,360	51,645	-11,154
151	Northumberland	32,955	20,781	20,329	-12,626
152	Suffolk	60,714	46,130	46,082	-14,632

Source: School Capacity Survey and School Census, DfE

\* See section 8.3 for full methodology for rankings



[J] LOCAL AUTHORITY SECONDARY SCHOOL PLACE FORECASTS AND PROJECTED SHORTFALLS BY HIGHEST CALCULATED SHORTFALL 2015/16\*

	Local authority	No of places	Forecast pupil nos			Shortfall
		May 2011	2013/14	2014/15	2015/16	2015/16
1	Hammersmith and Fulham	7,676	9,362	9,570	9,860	2,184
2	Redbridge	21,774	22,565	23,122	23,672	1,898
3	Milton Keynes	19,139	18,553	19,351	20,351	1,212
4	Barking and Dagenham	14,522	14,545	15,012	15,639	1,117
5	Haringey	14,651	14,309	15,615	15,740	1,089
6	Tower Hamlets	15,410	15,262	15,705	16,304	894
7	Wokingham	10,278	10,441	10,770	11,136	858
8	Waltham Forest	14,745	14,802	15,088	15,523	778
9	Slough	10,807	10,762	11,040	11,350	543
10	Brent	20,767	20,037	20,524	21,244	477
11	Sutton	17,131	17,328	17,274	17,595	464
12	Newham	19,198	18,756	19,155	19,570	372
13	Kingston upon Thames	10,393	10,284	10,356	10,612	219
14	Brighton and Hove	13,043	12,479	12,781	13,118	75
15	Lambeth	11,787	11,441	11,613	11,814	27
16	Bradford	37,757	36,175	36,939	37,758	1
17	City of London	.	.	.	.	0
18	Isles of Scilly	.	102	100	103	0
19	Harrow	12,209	11,841	11,953	12,117	-92
20	Westminster	10,325	9,507	9,845	10,187	-138
21	Bracknell Forest	7,522	6,667	6,914	7,301	-221
22	Rutland	3,051	2,719	2,778	2,819	-232
23	Buckinghamshire	36,167	35,296	35,518	35,896	-271
24	Richmond upon Thames	8,021	7,160	7,429	7,715	-306
25	Poole	9,071	8,852	8,782	8,745	-326
26	Solihull	18,248	17,636	17,800	17,919	-329
27	Ealing	18,749	17,978	18,158	18,418	-331
28	Calderdale	16,253	15,661	15,678	15,816	-437
29	Bristol, City of	20,760	19,351	19,797	20,305	-455
30	Croydon	23,060	22,224	22,287	22,586	-474
31	Southend-on-Sea	13,532	13,168	13,089	13,057	-475
32	Hackney	12,387	11,043	11,642	11,888	-499
33	Trafford	18,173	17,330	17,501	17,655	-518
34	Luton	14,538	13,275	13,642	14,019	-519
35	Hounslow	17,149	16,295	16,347	16,609	-540
36	Darlington	6,380	5,775	5,826	5,825	-555
37	West Sussex	49,034	47,261	47,716	48,478	-556
38	York	10,714	9,918	10,005	10,131	-583
39	Merton	10,020	9,106	9,160	9,424	-596
40	Birmingham	71,485	69,745	70,279	70,882	-603
41	Camden	10,440	9,770	9,760	9,830	-610
42	Reading	7,549	6,722	6,829	6,926	-623
43	Kensington and Chelsea	4,731	3,986	4,059	4,068	-663
44	Oldham	16,897	15,917	15,928	16,054	-843
45	Greenwich	15,116	13,289	13,674	14,239	-877
46	Bromley	23,083	22,125	22,115	22,180	-903

	Local authority	No of places May 2011	Forecast pupil nos			Shortfall 2015/16
			2013/14	2014/15	2015/16	
47	North Somerset	13,744	12,722	12,738	12,825	-919
48	Gloucestershire	41,356	39,658	40,051	40,409	-947
49	Telford and Wrekin	12,086	10,877	10,852	11,079	-1,007
50	Hartlepool	6,433	5,543	5,446	5,415	-1,018
51	Thurrock	9,732	8,704	8,661	8,662	-1,070
52	Derby	17,427	16,121	16,159	16,283	-1,144
53	West Berkshire	13,157	11,797	11,889	11,988	-1,169
54	Lewisham	15,596	13,416	13,845	14,398	-1,198
55	Blackburn with Darwen	10,695	9,329	9,392	9,464	-1,231
56	Blackpool	8,667	7,324	7,253	7,365	-1,302
57	Dudley	20,289	19,020	18,914	18,960	-1,329
58	Windsor and Maidenhead	11,207	9,527	9,645	9,748	-1,459
59	Leicester	19,130	17,275	17,371	17,668	-1,462
60	Islington	9,891	7,795	8,033	8,394	-1,497
61	Plymouth	18,499	17,101	16,996	16,940	-1,559
62	Bury	11,846	10,373	10,293	10,268	-1,578
63	Peterborough	15,183	13,511	13,517	13,600	-1,583
64	Coventry	23,056	20,696	21,005	21,446	-1,610
65	Wandsworth	13,225	11,394	11,469	11,615	-1,610
66	Halton	9,004	7,509	7,448	7,366	-1,638
67	Sandwell	22,075	20,198	20,218	20,436	-1,639
68	St. Helens	11,575	10,040	10,013	9,935	-1,640
69	Havering	17,924	16,183	16,238	16,250	-1,674
70	Torbay	9,857	8,213	8,140	8,099	-1,758
71	Tameside	15,126	13,697	13,528	13,319	-1,807
72	North East Lincolnshire	11,052	9,420	9,246	9,240	-1,812
73	Southwark	16,443	14,059	14,253	14,528	-1,915
74	Bath and North East Somerset	14,041	12,176	12,147	12,112	-1,929
75	Portsmouth	10,510	8,515	8,445	8,546	-1,964
76	Bournemouth	11,223	9,203	9,185	9,183	-2,040
77	Warrington	15,261	13,217	13,166	13,199	-2,062
78	Hillingdon	22,244	19,069	19,865	20,169	-2,075
79	Stockton-on-Tees	12,408	10,414	10,406	10,326	-2,082
80	Herefordshire	10,989	9,100	9,000	8,900	-2,089
81	Manchester	28,176	24,713	25,369	26,086	-2,090
82	Southampton	12,416	10,077	10,149	10,274	-2,142
83	Rochdale	13,671	11,727	11,541	11,507	-2,164
84	Newcastle upon Tyne	18,312	15,798	15,989	16,071	-2,241
85	Bolton	20,085	17,838	17,712	17,821	-2,264
86	Middlesbrough	10,208	7,877	7,801	7,942	-2,266
87	Rotherham	20,411	18,432	18,204	18,096	-2,315
88	Knowsley	8,503	6,317	6,225	6,139	-2,364
89	Shropshire	18,782	16,467	16,534	16,330	-2,452
90	Barnsley	14,579	11,612	11,759	12,086	-2,493
91	Enfield	24,585	22,218	22,111	22,087	-2,498
92	Swindon	13,689	11,303	11,204	11,177	-2,512
93	Gateshead	12,838	10,681	10,441	10,278	-2,560

	Local authority	No of places May 2011	Forecast pupil nos			Shortfall 2015/16
			2013/14	2014/15	2015/16	
94	Salford	13,328	10,572	10,571	10,720	-2,608
95	Wolverhampton	17,666	14,913	14,915	14,953	-2,713
96	North Tyneside	14,673	12,026	12,012	11,957	-2,716
97	North Lincolnshire	11,969	9,246	9,115	9,229	-2,740
98	Stoke-on-Trent	15,506	12,407	12,451	12,671	-2,835
99	Cheshire East	23,593	21,049	20,823	20,585	-3,008
100	Walsall	23,267	20,099	20,075	20,151	-3,116
101	Wakefield	23,127	20,120	20,003	19,976	-3,151
102	Sefton	21,158	18,149	18,095	17,994	-3,164
103	Barnet	25,810	22,447	22,494	22,589	-3,221
104	Redcar and Cleveland	11,426	8,400	8,211	8,144	-3,282
105	South Tyneside	10,643	7,606	7,448	7,331	-3,312
106	Medway	21,529	18,387	18,313	18,174	-3,355
107	East Riding of Yorkshire	24,728	21,552	21,478	21,329	-3,399
108	Sheffield	32,129	28,810	28,509	28,702	-3,427
109	Wiltshire	34,268	30,139	30,362	30,811	-3,457
110	Warwickshire	35,828	32,555	32,276	32,304	-3,524
111	Cheshire West and Chester	22,957	19,781	19,473	19,391	-3,566
112	Wigan	21,341	17,913	17,797	17,727	-3,614
113	Surrey	62,493	58,609	58,593	58,804	-3,689
114	Bexley	22,515	18,954	18,903	18,803	-3,712
115	East Sussex	30,363	26,683	26,486	26,344	-4,019
116	Stockport	17,758	13,781	13,550	13,667	-4,091
117	Kingston Upon Hull, City of	17,581	13,037	13,107	13,417	-4,164
118	Leeds	49,263	44,443	44,550	45,059	-4,204
119	Devon	45,409	41,172	41,185	41,074	-4,335
120	Kirklees	29,190	24,223	24,347	24,694	-4,496
121	Sunderland	19,801	15,556	15,361	15,244	-4,557
122	Cambridgeshire	37,207	32,322	32,386	32,539	-4,668
123	South Gloucestershire	21,135	16,895	16,601	16,422	-4,713
124	Doncaster	23,030	18,726	18,374	18,196	-4,834
125	Nottingham	18,883	13,987	13,988	14,010	-4,873
126	Bedford	16,124	11,144	11,154	11,202	-4,922
127	Leicestershire	49,328	43,596	43,912	44,368	-4,960
128	Oxfordshire	43,715	37,485	38,103	38,657	-5,058
129	Wirral	26,183	21,177	21,023	20,997	-5,186
130	Cumbria	36,258	31,328	30,839	30,514	-5,744
131	Cornwall	34,778	30,219	29,719	29,014	-5,764
132	Liverpool	33,711	28,425	28,083	27,812	-5,899
133	Isle of Wight	13,865	8,181	8,049	7,939	-5,926
134	Central Bedfordshire	25,022	18,217	18,586	18,988	-6,034
135	Somerset	33,917	27,649	27,487	27,340	-6,577
136	Durham	35,078	28,720	28,387	28,342	-6,736
137	Dorset	33,186	26,444	26,264	26,174	-7,012
138	Worcestershire	39,612	32,731	32,482	32,542	-7,070
139	Hertfordshire	91,076	81,192	82,204	83,464	-7,612
140	Derbyshire	51,129	44,856	44,168	43,440	-7,689
141	Norfolk	54,758	48,212	47,471	46,928	-7,830
142	Lincolnshire	52,052	46,034	45,177	44,170	-7,882
143	Northamptonshire	54,790	45,800	46,017	46,298	-8,492

	Local authority	No of places May 2011	Forecast pupil nos			Shortfall 2015/16
			2013/14	2014/15	2015/16	
144	North Yorkshire	46,787	37,764	37,445	37,264	-9,523
145	Lancashire	77,999	67,127	67,193	67,548	-10,451
146	Essex	96,850	85,715	85,448	85,942	-10,908
147	Kent	109,094	98,683	98,071	97,722	-11,372
148	Staffordshire	62,799	51,645	51,258	51,235	-11,564
149	Nottinghamshire	58,232	47,436	46,730	46,577	-11,655
150	Hampshire	78,437	67,445	67,067	66,739	-11,698
151	Northumberland	32,955	20,329	20,022	19,841	-13,114
152	Suffolk	60,714	46,082	45,314	44,761	-15,953

Source: School Capacity Survey and School Census, DfE

\* See section 8.3 for full methodology for rankings

[K] PRIORITY SCHOOLS BUILDING PROGRAMME

School	City	Region	School	City	Region
Pardes House Primary School	Barnet	London	Harris Academy Bromley	Beckenham	Kent
St Bedes C of E Aided Junior School	Woking	Surrey	Ridgeway High School	Wirral	Merseyside
Hawkswood Primary Pru	Chingford	London	Shiney Row Primary School	Houghton Le Spring	Tyne and Wear
Castle Vale Performing Arts College	Birmingham	West Midlands	St Lawrence C of E Aided Junior School	Woking	Surrey
The Samuel Lister Academy	Bingley	West Yorkshire	Flowery Field Primary School	Hyde	Cheshire
Don Valley School & Performing Arts College	Doncaster	South Yorkshire	Fox Hill Primary School	Sheffield	South Yorkshire
Alfreton Grange Arts College	Alfreton	Derbyshire	Eastbury Comprehensive School	Barking	Essex
Goffs School	Waltham Cross	Hertfordshire	Hawes Side Primary School	Blackpool	Lancashire
The Highfield School	Letchworth Garden City	Hertfordshire	Palatine Sports College	Blackpool	Lancashire
Wood End Primary School	Wolverhampton	West Midlands	Oakbank School	Keighley	West Yorkshire
Brumby Junior School	Scunthorpe	Humberside	Alperton Community School	Wembley	Middlesex
Priory Fields School	Dover	Kent	Carlyle Infant School	Derby	Derbyshire
Stainburn School & Science College	Workington	Cumbria	Woodlands School	Derby	Derbyshire
Chaddesden Park Infant School	Derby	Derbyshire	Withernsea High School	Withernsea	Humberside
Hill Top School	Gateshead	Tyne and Wear	Front Street Community Primary School	Newcastle	Tyne and Wear
Foredyke Primary School	Hull	Humberside	Lingey House Primary School	Gateshead	Tyne and Wear
Oakfield C of E Aided Primary School	Ryde	Isle of Wight	Our Lady Of Grace Catholic Primary School	Charlton	London
Laleham Gap School	Broadstairs	Kent	Newton St Cyres Primary School	Exeter	Devon
Lynncroft Primary School	Nottingham	Nottinghamshire	Westfield Community Technology College	Watford	Hertfordshire
Serlby Park Academy	Doncaster	South Yorkshire	Hounslow Manor School	Hounslow	Middlesex
South Nottinghamshire Academy	Nottingham	Nottinghamshire	Bedford Drive Primary School	Wirral	Merseyside
Abingdon Primary School	Stockport	Cheshire	The Orchard School	Brixton	London
Ernesford Grange School Redevelopment	Coventry	West Midlands	Plymouth Grove Primary School	Manchester	Greater Manchester
St Johns C of E Primary School	Stockport	Cheshire	Baysgarth School	Barton Upon Humber	Humberside
St Marys Rc Primary School	Stockport	Cheshire	Sevenoaks Primary School	Sevenoaks	Kent
Mandale Mill Primary School	Stockton on Tees	Cleveland	Smarden Primary School	Ashford	Kent
St Anthonys Catholic Girls Academy	Sunderland	Tyne and Wear	Grange Lane Primary School	Scunthorpe	Humberside
Riverview C of E Primary & Nursery School	Epsom	Surrey	Harrogate High School	Harrogate	North Yorkshire
The Cedar School	Southampton	Hampshire	St Ursulas E-Act Academy	Bristol	Avon
Holden Clough Primary School	Ashton under Lyne	Lancashire	Richard Lee Primary School	Coventry	West Midlands
Foxfield School	Wirral	Merseyside	Chestnut Grove School	Balham	London
Hillfields Primary School	Bristol	Avon	St Marys C of E Infant School	Swindon	Wiltshire
President Kennedy School	Coventry	West Midlands	Bedlingtonshire Community High School	Bedlington	Northumberland
Reigate Primary School	Derby	Derbyshire	Werneth School	Stockport	Cheshire
Aylward Primary School -	Stanmore	Middlesex	Great Cornard Upper School & Technology Coll.	Sudbury	Suffolk
Marlborough Primary School	Harrow	Middlesex	Castleford Redhill Infant School	Castleford	West Yorkshire
Priestmead Primary School And Nursery	Harrow	Middlesex	Silver Springs Academy	Stalybridge	Cheshire
The Grove Primary School	Totnes	Devon	Eastbrook Comprehensive School	Dagenham	Essex
Abbotsfield School For Boys	Uxbridge	Middlesex	Plantsbrook School	Sutton Coldfield	West Midlands
Alice Stevens School	Coventry	West Midlands	Belle Vue Boys School	Bradford	West Yorkshire
Wyken Croft Primary School	Coventry	West Midlands	King James I Academy	Bishop Auckland	County Durham
Haytor View Community Primary School	Newton Abbot	Devon	Highfield Community Primary School	Chester	Cheshire
Britannia Bridge Primary School	Wigan	Lancashire	Roman Road Primary School	Gateshead	Tyne and Wear
The Eltham Foundation School	Eltham	London	Barnard Grove Primary School	Hartlepool	Cleveland
Glenbrook Primary And Nursery School	Nottingham	Nottinghamshire	Ladysmith Junior School	Exeter	Devon
John Davies Primary School	Sutton in Ashfield	Nottinghamshire	South Molton United C of E Junior School	South Molton	Devon
St John's Church School	Peterborough	Cambridgeshire	Castle Primary School	Tiverton	Devon

School	City	Region	School	City	Region
Askern Moss Road Infant School	Doncaster	South Yorkshire	Top Valley School & Engineering College	Nottingham	Nottinghamshire
Culverstone Green Primary School	Gravesend	Kent	Annie Holgate Infant School	Nottingham	Nottinghamshire
Wold Primary School	Hull	North Humberside	Sunnyside Primary And Nursery School	Nottingham	Nottinghamshire
Mount Pleasant Junior & Nursery School	Huddersfield	West Yorkshire	The Queens C of E Primary School	Richmond	London
Stopsley High School	Luton	Bedfordshire	Hall Green Primary School	West Bromwich	West Midlands
Stanley Grove Primary School	Manchester	Greater Manchester	Edward The Elder Primary School	Wolverhampton	West Midlands
Stratford School Academy	Forest Gate	London	Highfurlong School	Blackpool	Lancashire
Henderson Avenue Primary School	Scunthorpe	Humberside	Hylton Castle Primary School	Sunderland	Tyne and Wear
John Spence Community High School	North Shields	Tyne and Wear	St Josephs Catholic Infant School	Camberwell	London
Marden High School	North Shields	Tyne and Wear	Mill Green School	Newton le Willows	Merseyside
St Peters C of E Junior School	Marlborough	Wiltshire	Kings Norton High School	Birmingham	West Midlands
Francis Askew Primary School	Hull	Humberside	Collegiate High School	Blackpool	Lancashire
Garston Manor School	Watford	Hertfordshire	Seaham School Of Technology	Seaham	County Durham
Ethel Wainwright Primary School	Mansfield	Nottinghamshire	Copland Community School	Wembley	Middlesex
Harvills Hawthorn Primary School	West Bromwich	West Midlands	St Annes Park Primary School	Bristol	Avon
Slough Grammar School	Slough	Berkshire	Neston High School	Neston	Cheshire
Bitterne Park School	Southampton	Hampshire	Ilfracombe Arts College	Ilfracombe	Devon
Gnosall St Lawrence C of E Primary School	Stafford	Staffordshire	Cedars Manor School	Harrow	Middlesex
Hetton School	Houghton le Spring	Tyne and Wear	Manor College Of Technology	Hartlepool	Cleveland
Castleford Redhill Junior School	Castleford	West Yorkshire	Suttons Primary School	Hornchurch	Essex
George Mitchell School	Leytonstone	London	Mawney Foundation School	Romford	Essex
Prince Edward Primary School	Sheffield	South Yorkshire	Kings Langley School	Kings Langley	Hertfordshire
Ian Ramsey C of E Comprehensive School	Stockton on Tees	Cleveland	Aylesham Primary School	Canterbury	Kent
Turves Green Boys School	Birmingham	West Midlands	Whitcliffe Mount B & E College	Cleckheaton	West Yorkshire
Elton High School	Bury	Lancashire	Charles Edward Brooke School	Stockwell	London
Maria Fidelis Convent School	Camden Town	London	Sir Francis Drake Primary School	Deptford	London
Blacon High School	Chester	Cheshire	Halfway Houses Primary School	Sheerness	Kent
Archbishop Lanfranc School	Croydon	Surrey	St Thomas More Catholic Primary School	Coventry	West Midlands
Hallmoor School	Birmingham	West Midlands	Lees Brook Community School	Derby	Derbyshire
Hessle High School & Sixth Form College	Hessle	North Humberside	West Cornforth Primary School	Ferryhill	County Durham
Charles Thorp Comprehensive School	Ryton	Tyne and Wear	Wyvern College	Salisbury	Wiltshire
Eltham C of E Primary School	Eltham	London	Westlands Primary School	Sittingbourne	Kent
Holy Trinity C of E Primary School	Hartlepool	Cleveland	Eastfield Primary School	Hull	Humberside
Glenbrook Primary School	Clapham	London	Weald Junior School	Harrow	Middlesex
Neaseden Primary School	Hull	Humberside	Fountaindale School	Mansfield	Nottinghamshire
Meopham School	Gravesend	Kent	Montacute Special School	Poole	Dorset
St Philip Howard Catholic Primary School	Herne Bay	Kent	Annie Holgate Junior School	Nottingham	Nottinghamshire
The Vale Academy	Brigg	Humberside	Leamington Primary And Nursery School	Sutton in Ashfield	Nottinghamshire
Longbenton Community College	Newcastle	Tyne and Wear	The Grove School	Newark	Nottinghamshire
Southfield Technology College	Workington	Cumbria	Wath Victoria Primary School	Rotherham	South Yorkshire
South Molton Community College	South Molton	Devon	The Phoenix Collegiate	Wednesbury	West Midlands
Durham Trinity School & Sports College	Durham	County Durham	Grangefield School	Stockton on Tees	Cleveland
William Beamont Community High School	Warrington	Cheshire	St Michaels Rc School	Stockton on Tees	Cleveland
Ainthorpe Primary School	Hull	Humberside	Pyrford C of E Aided Primary School	Woking	Surrey
The Canterbury Primary School	Canterbury	Kent	Broadoak Primary School	Ashton under Lyne	Lancashire
Prudhoe Community High School	Prudhoe	Northumberland	Buxton School	Leytonstone	London
Springfield Primary School	Nottingham	Nottinghamshire	Selwyn Primary School	Chingford	London

School	City	Region	School	City	Region
Usworth Grange Primary School	Washington	Tyne and Wear	Little Ilford School	Manor Park	London
Carlton Bolling College	Bradford	West Yorkshire	Great Coates Primary School	Grimsby	South Humberside
Mayfield Primary School	Ealing	London	Burton-Upon-Stather Primary School	Scunthorpe	Humberside
Hampstead School	Camden Town	London	Harris Academy Beckenham	Beckenham	Kent
Crowton Christ Church Cofe Primary School	Chester	Cheshire	Whitehouse Primary School	North Shields	Tyne and Wear
Asterdal Primary School	Derby	Derbyshire	Chaddesden Park Junior School	Derby	Derbyshire
Chagford C of E Primary School	Newton Abbot	Devon	Whitmore Park Primary School	Coventry	West Midlands
Heathlands Junior & Infant School	Birmingham	West Midlands	The Edith Borthwick School	Braintree	Essex
Goole High School Academy	Goole	North Humberside	Queen Elizabeth School	Atherstone	Warwickshire
Wolfreton School	Hull	Humberside	York Road Junior Academy	Dartford	Kent
Invicta Primary School	Blackheath	London	The Heath School	Runcorn	Cheshire
Halebank C of E Primary School	Widnes	Cheshire	Lansdowne School	Stockwell	London
Vaughan Primary School	Harrow	Middlesex	Redbridge High School	Liverpool	Merseyside
Bishops Hatfield Girls School	Hatfield	Hertfordshire	Camberwell Park Specialist Support School	Manchester	Greater Manchester
Newton Popleford Primary School	Sidmouth	Devon	Abbey Primary School	Mansfield	Nottinghamshire
Carisbrooke College	Newport	Isle of Wight	Carsic Primary School	Sutton in Ashfield	Nottinghamshire
Christ The King College	Newport	Isle of Wight	Rosebrook Primary School	Mansfield	Nottinghamshire
Ryde Academy	Ryde	Isle of Wight	Saddleworth School	Oldham	Lancashire
Lord Deramores Primary School	York	North Yorkshire	West Town Primary School	Peterborough	Cambridgeshire
All Saints Catholic College	Huddersfield	West Yorkshire	Reading Girls School	Reading	Berkshire
Allen Edwards Primary School	Clapham	London	Mesne Lea Primary School	Salford	Greater Manchester
Crosby Primary School	Scunthorpe	Humberside	Moorgate Community Primary School	Tamworth	Staffordshire
St James C of E Junior School	Barrow in Furness	Cumbria			
The Manor	Cambridge	Cambridgeshire			
The Deanery C of E High School	Wigan	Lancashire			
Weald Infant School	Harrow	Middlesex			
Aigburth High School	Liverpool	Merseyside			
The Duchess's Community High	Alnwick	Northumberland			
King Richard School	Portsmouth	Hampshire			
Handale Primary School	Saltburn by the Sea	Cleveland			
Laurence Jackson School	Guisborough	Cleveland			
Oakwood Technology College	Rotherham	South Yorkshire			
Clough Hall Technology School	Stoke on Trent	Staffordshire			
Bridge Hall Primary School	Stockport	Cheshire			
Chantry High School	Ipswich	Suffolk			
St Josephs Rc Primary School	Durham	County Durham			
Dee Point Primary School	Chester	Cheshire			
J H Godwin Primary School	Chester	Cheshire			
Cavendish Close Junior School	Derby	Derbyshire			
Lawford Mead Primary	Chelmsford	Essex			
Wingfield Primary School	Blackheath	London			
Salvatorian College	Harrow	Middlesex			
Hacton Primary School	Hornchurch	Essex			
Longdean School	Hemel Hempstead	Hertfordshire			
Northwood School	Northwood	Middlesex			
Swakeleys School	Uxbridge	Middlesex			
Castle Community College	Deal	Kent			
Chantry Primary School	Gravesend	Kent			
Carr Infant School	York	North Yorkshire			
Forest Lodge Primary School	Leicester	Leicestershire			

Source: Barbour ABI