WHOLE LIFE CONSULTANTS LTD

CITB ANALYSIS

Local Skills – Scotland 2023 update

An analysis of the demand presented by the construction landscape in seven local areas across Scotland

July 2023

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1. Executive Summary

This report examines workforce demand against supply, using a similar approach to previous work carried out in 2018[1], highlighting potential mismatches in local areas of Scotland.

Workforce demand was compared to where construction workers were located in 2022, assessing against trends in job vacancy data and CITB's latest workforce mobility report[2].

As the report compared demand and supply for work that happened in 2022, there was a close alignment for overall workforce numbers. However, this was in the context of construction companies struggling to recruit staff, while also facing issues with rising costs for materials and labour. When the trends in job vacancy postings and workforce mobility were considered along with the assessment of supply against demand, the report showed that:

- **Aberdeen City & Shire:** workforce supply had reduced, and shortfalls were reflected in the increased number of vacancies being advertised.
- **Lanarkshire & South West areas:** both showed more supply than demand, which was the case in 2018, and the gap analysis figures have remained similar.
- **Tayside, Forth and Fife:** the workforce level has remained consistent, however there is now more supply than demand, whereas there were shortfalls in 2018. This looks to be due to changes in work demand for this area.
- **Highlands & Islands:** in 2018 there was a shortfall, whereas in 2022 supply and demand looks to be balanced. This is due to a combination of the workforce supply numbers increasing and the demand levels reducing.
- **Glasgow & West:** in 2018, there was slightly more supply than demand, although there were some occupational gaps. This has changed to a general shortage of workers, with all of the occupational groups having a gap between supply and demand. This is also reflected in the increased vacancy postings for the area which have been high for the last two years.
- **The South East** continues to be an area where demand for workers out-strips supply. In 2018 this was one of two areas with a large shortfall, and the gap has increased. There is clearly demand for workers in this area, which outstrips the area's supply, however, vacancy postings have trended below the overall figure for Scotland. With demand outstripping supply it is surprising that there hasn't been a stronger increase in vacancies being posted, unless the supply of workers is being met by people travelling in from other areas.

The updated report complements the evidence base and together with other sources of labour market information, will help to inform regional skills action plans in Scotland. In terms of recommendations:

- The report is a starting point for work with all relevant stakeholders to create regional skills action plans with the aim of maintaining the construction workforce at the right level with the right mix of skills. The labour market pressure companies have been facing looks set to continue, therefore being able to recruit and develop the workforce, now and for the future, is arguably more pressing now that it was in 2018.
- The report notes that construction workers are mainly developed from within Scotland, therefore the appropriate infrastructure has to be in place to ensure that the workforce is developed.
- Looking at local skills within Scotland necessitates making some decisions on area boundaries. While these boundaries can help us to better understand the dynamics around demand and supply, they shouldn't constrain approaches to skills development. It is important to ensure that a collaborative process is adopted, recognising that workforce and skills development may cut across local boundaries while adapting to changing patterns of construction work.

The construction industry in Scotland has continued to deliver value to the economy during challenging times. Being able to continue to do that, delivering a built environment in the future that is both energy efficient and sustainable, will require a workforce that is equipped with the appropriate skills and training. This is a long-term commitment that has to be facilitated by industry, government and stakeholders working in partnership, backed up with training infrastructure and skills plans to ensure that the workforce for the future is being developed today.

1 CITB (2018) Local Construction Skills Needs for Scotland
2 CITB (2023) Workforce Mobility and Skills in the Construction Sector – Scotland report 2023

2. Introduction

In 2018, CITB, working with Experian and Whole Life Consultants Ltd, produced a report on the local skills needs for construction in Scotland[3]. The report provided an assessment of workforce demand, supply and emerging skills gaps across areas of Scotland, over a five-year period. For the purposes of the report the 32 local authorities in Scotland were grouped into the seven regional areas shown in Figure 1. We acknowledge that these areas don't exactly correlate to City or Growth Deal areas, however, the seven areas allowed disaggregation of workforce data to be made for labour demand and supply.

At that time, the construction industry in Scotland was looking at a period of work stabilising as large infrastructure programmes were coming to a close. The report highlighted that there was a potential shortage in the number of workers to meet future demand, with gaps in some occupations and in regions within Scotland.

The report was the first of its kind and had limitations, particularly regarding available data, rural challenges, and workforce mobility, however, the aim was to repeat the analysis on a regular basis to help inform regional skills action plans and enrich the evidence base for Scotland.

This report re-examines workforce demand against supply using a similar approach to again gauge potential workforce gaps between demand and supply in the areas of Scotland.

There have been clear challenges for the construction industry since the previous report, such as dealing with the impact of Covid-19, conflict in Ukraine, raw material supply and inflation. This means that the construction industry in Scotland is again looking at a period of work stabilising, although the reasons are different to those in 2018. We are forecasting relatively low levels of growth in construction output, an average of 1.0% per year over the next five years, with a drop in output during 2023[4]. This level of output growth will result in the construction workforce remaining around the current level.

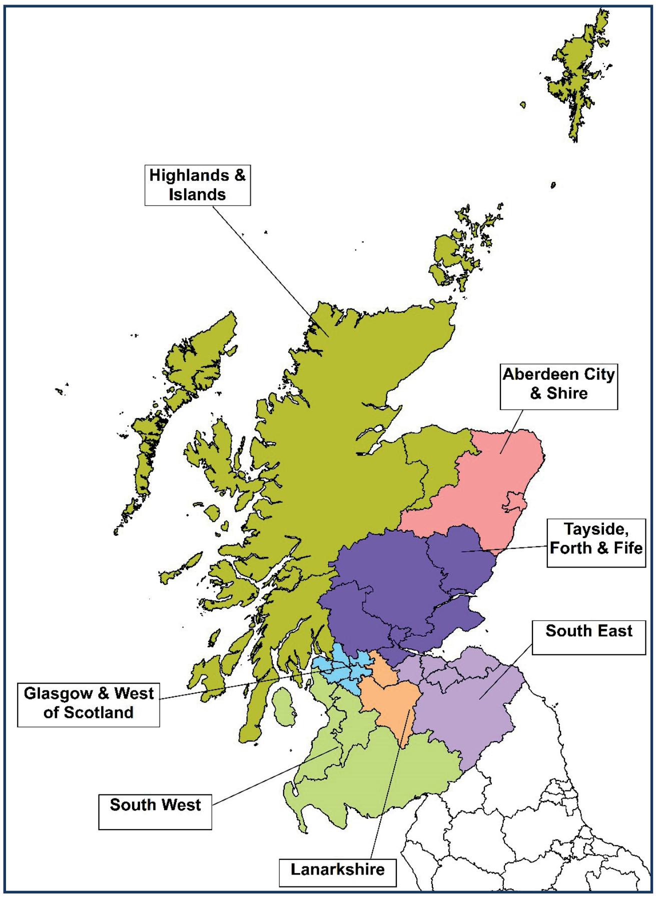
While the previous report looked at demand and supply in relation to training, in this report we look at how demand compared to where construction workers were located in 2022, assessing against recent trends in job vacancy data and CITB's latest workforce mobility report[5].

The report then reviews the gap analysis, considering how demand and supply has evolved over the last four years.

As we are comparing demand and supply for work that happened in 2022, it is understandable that there will be closer alignment between for overall workforce numbers. However, this must be seen in the context that construction companies have struggled to recruit workers, while also facing issues with rising costs for materials and labour. We see the industry as still having an underlying challenge to recruit the workers it needs now and in the future as job vacancies remain at a high level and there is a lack of workers in the labour market to fill them.

It is therefore important that the construction industry works collaboratively with stakeholders, government, trade associations and the like to promote the career opportunities that are on offer to as wide a potential workforce as possible to ensure that future vacancies can be filled.

Figure 1: Local areas – Scotland



3 CITB (2018) Local Construction Skills Needs for Scotland
4 CITB (2023) Construction Skills Network – Scotland 2023-2027
5 CITB (2023) Workforce Mobility and Skills in the Construction Sector – Scotland report 2023

3. Labour demand in Scotland

This section outlines the combined labour demand from the seven regions in Scotland, with the individual analysis for each included in the accompanying Technical Annex document. With a decline in output expected in 2023, 2022 is the peak year for workforce demand and the analysis therefore focuses on that year.

The methodology for the demand analysis is outlined in the Technical Annex and is consistent with the approach used in the 2018 local skills report. The construction labour demand for Scotland in 2022 is based on the known pipeline from published sources such as Glenigan[6] and supplemented with estimates of other work taking place.

3.1. Pipeline of projects

We have analysed projects in the Glenigan database[7] and, where required, updated that list with any supplementary information that was available.

Table 1 looks at the full range of construction projects identified, showing the number of projects for each local region, their total value and also the number of projects that would be classed as being significant, i.e., those with a value above the mean for each local area.

The areas identified with the most projects and largest total project value are the South East and Glasgow & West, which is consistent with the previous report. The relationship between all projects and those identified as being significant for each local area is also consistent with the previous reports. Overall, significant projects account for around 20% of the number of projects taking place in each area and over 80% of the total project value.

Table 1: Key data for projects by local area in Scotland, (total project pipeline)

	Number of Projects		Project value (£m, current)	
Area	**All**	**Significant**	**All**	**Significant**
Aberdeen City & Shire	338	68	£3,633	£3,044
Glasgow and West	731	116	£18,867	£17,127
Highlands and Islands	584	121	£6,086	£5,500
Lanarkshire	364	90	£3,301	£2,792
South East	817	106	£28,260	£25,900
South West	355	76	£1,292	£943
Tayside, Forth & Fife	685	144	£5,657	£4,848
Total	**3,874**	**721**	**£67,096**	**£60,154**

6 https://www.glenigan.com/
7 The Glenigan database allows contractors to identify leads and to carry out construction market analysis. For the purposes of this analysis, we have used the Q3 2022 cut of data.

Table 2 focuses on the distribution by project type for new build spend in the pipeline of known projects in 2022. New housing was the main work sector, with 42% of the total new build spend, followed by Infrastructure at 29%. New housing and infrastructure work have been the main sectors for construction projects for a number of years in Scotland, and we forecast that this will continue to be the case in the coming years.

Table 2: New-build construction spend by project type in 2022 (defined project pipeline)

Project Type	Spend in 2022 (2022 values - £m)	% of total
New housing	£4,348	42%
Infrastructure	£2,993	29%
Commercial	£1,539	15%
Public non-housing	£1,049	10%
Industrial	£471	5%
Total	**£10,400**	

3.2. Estimate of labour demand

Having a view on the project demand by local area for Scotland allows us to breakdown the overall workforce demand and an overall breakdown of the 2022 total labour demand is shown in Figure 2. This illustrates that the main areas of demand are similar to those identified in the previous report, i.e., South East and Glasgow & West areas. As these are the main population areas within Scotland it's not surprising that they remain the main areas where construction work is taking place and therefore have the highest levels of workforce demand. The total demand for Scotland in 2022 was just over 230,000 full-time equivalent workers.

Figure 2: Labour demand by local area, Scotland, 2022

3.3. Construction labour demand by local area in 2022

A workforce breakdown for the main occupational groups for demand is shown in Table 3 below. This breakdown takes account of known work identified from the pipeline analysis along with estimates of other new build and repair, maintenance & improvement work. The workforce breakdown is similar to the 2018 report, with 50% of labour demand coming from skilled trade occupations.

Table 3: Construction labour demand by local area, Scotland, 2022

Occupational Group	Aberdeen City and Shire	Glasgow and West	Highlands and Islands	Lanarkshire	South East	South West	Tayside, Forth and Fife
Construction Managers and Supervisors	3,850	8,150	4,100	3,500	9,350	2,500	6,250
Construction Professional/ Technical	3,950	8,450	3,950	3,700	10,200	2,650	6,450
Labourers	1,150	2,500	1,400	1,200	2,550	800	1,900
Non-construction trades	350	800	400	350	900	250	600
Skilled trades - bricklaying	550	1,150	500	550	1,450	400	800
Skilled trades - electrical	2,150	4,550	2,100	1,750	5,150	1,300	3,200
Skilled trades - other occupations	3,950	8,600	4,350	3,950	9,400	2,700	6,400
Skilled trades - painting and decorating	750	1,650	800	750	1,850	500	1,200
Skilled trades - plumbing & HVAC	1,050	2,250	950	900	2,650	650	1,550
Skilled trades - wood occupations	2,150	4,600	2,050	1,900	5,500	1,400	3,300
Support staff - office based	3,500	7,450	3,600	3,300	8,750	2,300	5,700
Total	**23,450**	**50,150**	**24,200**	**21,850**	**57,750**	**15,500**	**37,250**

4. Workforce supply

We have identified the construction workforce supply by using the Industry of Employment variable in the Annual Population Survey from the Office for National Statistics. By using data from this variable and applying it to the industry workforce figures in the Construction Skills Network report, we can take a view on the construction workforce supply that is in each of the seven local areas.

In response to Covid-19, measures such as the Coronavirus Job Retention Scheme and the furloughing of workers had an impact on data. We have therefore taken average workforce figures from 2020 to 2022 when analysing distribution by area.

4.1. Business distribution

We have found that the construction workforce has tended to have a relationship with the number and location of construction businesses and Table 4 shows how the view in 2018 compares to the current view. Between the publication of the 2018 report and now, the construction industry in Scotland has seen:

- An increase in the number of businesses, up to 21,765 (2022)[8]
- This increase has been in the number of micro and small sized businesses
- The pattern of business distribution across Scotland by area has remained broadly similar.

Table 4: Construction business distribution, Scotland

Business Distribution	2018 Report	2023 Update
Aberdeen City & Shire	10.7%	10.1%
Glasgow & West	16.9%	17.2%
Highlands & Islands	13.8%	13.1%
Lanarkshire	12.2%	13.0%
South East	17.2%	17.6%
South West	9.6%	9.3%
Tayside, Forth & Fife	19.6%	19.7%

This indicates a **fairly stable pattern** of construction business distribution across Scotland, even with the **challenges** the industry has faced in recent years.

8 ONS, UK Business Counts, Scotland, F-Construction industry (from NOMIS, Jan 2023)

4.2. Workforce location by area

While the number of businesses has increased, there has been a decrease in the construction workforce from nearly 241,000 in 2018, down to 231,400 in 2022[9], and Table 5 shows how this distribution has changed by local area.

Table 5: Workforce location by local area, Scotland, 2018 vs 2020-2022

	2018		2020-2022	
Area	**Share**	**Workforce**	**Share**	**Workforce**
Aberdeen City & Shire	9.3%	22,400	8.3%	19,200
Glasgow and West	19.4%	46,700	17.7%	40,900
Highlands and Islands	10.5%	25,350	12.8%	29,600
Lanarkshire	16.0%	38,600	15.6%	36,000
South East	14.6%	35,250	15.9%	36,700
South West	9.7%	23,250	9.9%	22,950
Tayside, Forth & Fife	20.5%	49,350	19.9%	46,000

There is some consistency in that the main areas where workers are located follows main population centres in Scotland, and it is the same areas that are highlighted as having the largest shares, such as Tayside, Forth & Fife; Glasgow and West.

However, there has been a noticeable drop in the number of workers located in Glasgow & West and Aberdeen City & Shire areas, while there has been an increase in the Highlands & Islands area, which indicates some movement/relocation of construction workers.

Looking within the seven areas by the main types of construction occupations, the workforce supply breakdown is shown in Table 6.

9 CITB, CSN 2023-2027, Scotland Five Year Outlook

Table 6: Workforce breakdown by local area, Scotland

Occupational Group	Aberdeen City and Shire	Glasgow and West	Highlands and Islands	Lanarkshire	South East	South West	Tayside, Forth and Fife
Construction Managers and Supervisors	3,150	6,700	4,850	5,900	6,050	3,750	7,550
Construction Professional/Technical	3,300	7,000	5,050	6,150	6,300	3,950	7,900
Labourers	950	2,050	1,500	1,800	1,850	1,150	2,300
Non-construction trades	300	650	450	550	600	350	750
Skilled trades - bricklaying	450	950	700	850	850	550	1,050
Skilled trades - electrical	1,700	3,600	2,600	3,150	3,250	2,000	4,050
Skilled trades - other occupations	3,300	7,000	5,050	6,150	6,300	3,950	7,900
Skilled trades - painting and decorating	600	1,300	950	1,150	1,200	750	1,500
Skilled trades - plumbing & HVAC	850	1,750	1,300	1,550	1,600	1,000	2,000
Skilled trades - wood occupations	1,750	3,700	2,700	3,250	3,350	2,100	4,150
Support staff - office based	2,900	6,150	4,450	5,400	5,500	3,450	6,900
Total	**19,200**	**40,900**	**29,600**	**36,000**	**36,700**	**22,950**	**46,000**

While the number of businesses has increased, there has been a decrease in the construction workforce from nearly **241,000** in 2018, down to **231,400** in 2022.

4.3. Construction job vacancies

We have recently been able to analyse job vacancy postings[10] and figures below illustrate recent trends in vacancy postings for construction occupations in each of the local areas of Scotland. Figure 3 shows the overall view for Scotland, with an increase in job vacancies picking up in 2021 and 2022. Although vacancy postings dropped back towards the end of 2022 and into the start of 2023, they remain at double the level they were at the start of 2021.

Figure 4 overlays the vacancy postings in areas where there was stronger demand, notably Glasgow & West and Aberdeen City & Shire. While these areas follow a similar profile, we can see that there was more of a peak in Glasgow & West towards the end of 2021/start of 2022, then slightly later in Aberdeen City & Shire in 2022. Vacancy postings in these areas, along with Lanarkshire remain noticeably higher going into 2023, which possibly ties in with the workforce reduction noted earlier.

In comparison, Figure 5 shows the same view for the remaining local areas. Again, a similar pattern when it comes to peaks and troughs, although, vacancy levels are lower when compared to the areas on Figure 4.

The pattern of vacancies across the seven local areas highlights two main points. Firstly, there is variation across Scotland for vacancies being posted which is slightly different to what is seen for demand. Secondly, although there is variation, all areas are seeing more vacancies posted than they were two years ago, which is also reflected in feedback from companies about continued general difficulty in recruiting workers.

Figure 3: Index of online job vacancy postings, Scotland

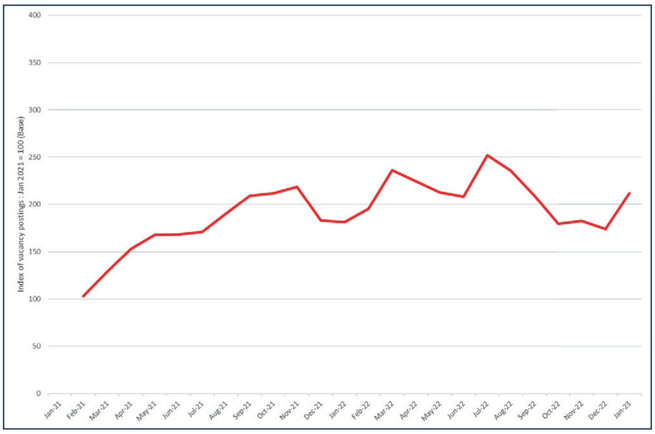


Figure 4: Index of online job vacancy postings, Scotland and selected local areas

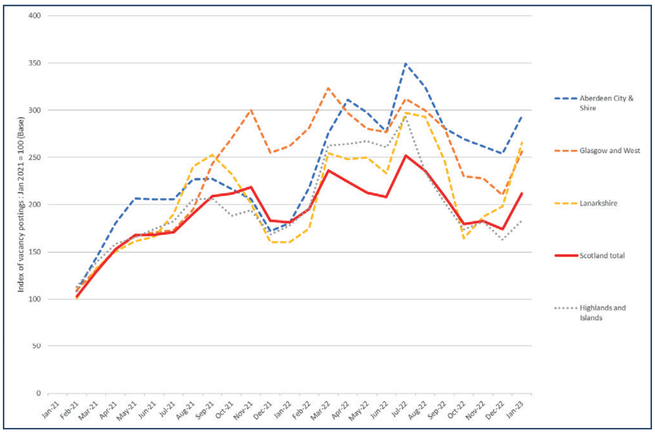
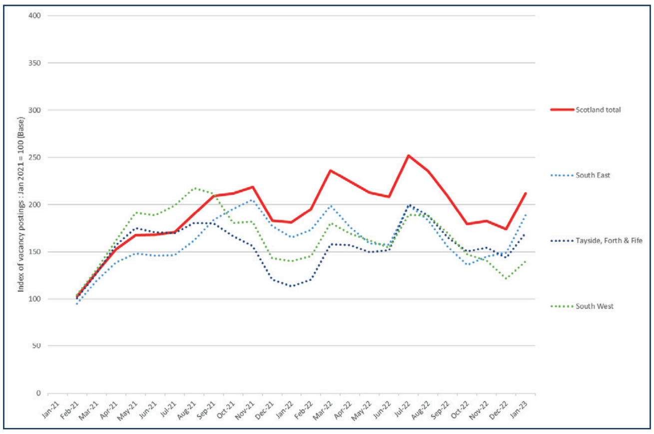


Figure 5: Index of online job vacancy postings, Scotland and selected local areas



10 Lightcast, online job vacancy postings, selected occupations linked to construction work

4.4. Workforce mobility

The latest research work on the workforce mobility[11] of construction workers in Scotland shows that:

94% of construction workers were living in Scotland when they started their career

76% have worked continuously in the industry, which is higher than the UK figure of 61%

76% have worked within Scotland for their entire career, again higher than the UK figure of 49% for having worked in the same area

32% of workers haven't travelled more than 20 miles away from their home to work, which is similar to the UK (33%)

The average furthest distance travelled by construction workers in Scotland is **49 miles** in line with the UK average of 46 miles

The mean distance from a workers' home to their current site is **12 miles** slightly less than the UK (16 miles)

In 2022, Scotland has a shorter mean travel distance than 2018/19 (18 miles) and 2015 (16 miles). This pattern has also been noted in the UK's mean travel distance.

This highlights that the Scottish construction workforce is drawn from within Scotland, and tends to stay within Scotland, which is positive when it comes to workforce supply.

However, while workers will move around Scotland for work, this latest research indicates that the travel distance for workers is reducing when compared to previous reports. This could have an impact on how the supply of workers is able to respond to future demand.

11 CITB (2023) Workforce Mobility and Skills in the UK Construction Sector 2022 – Scotland Report

5. Gap analysis

By comparing workforce supply against labour demand, we can take a view on the potential gaps between the number of workers in an area and the demand for work.

As mentioned earlier, as we're looking at work that happened in 2022, it's expected that when we look at Scotland's overall workforce, supply closely matched demand with a difference of 1,200 workers, which is 0.5% of the total supply.

2022
Supply
231,350

2022
Demand
230,150

When looking at the overall workforce by the main occupational groups, again there is a very close match between supply and demand, with only one group (painting and decorating) showing a very marginal shortfall of 50 workers. In all of the other occupational groups, supply either matched, or slightly exceeded demand.

There is, however, some variation when the gap between supply and demand is examined by local areas, as shown in Table 7. In four of the local areas there is more supply than demand (**Green**) while in the other three areas there is a gap (**Pink**).

Table 7: Gap analysis breakdown by local area, Scotland

Occupational Group	Aberdeen City and Shire	Glasgow and West	Highlands and Islands	Lanarkshire	South East	South West	Tayside, Forth and Fife
Construction Managers and Supervisors	-700	-1,450	750	2,400	-3,300	1,250	1,300
Construction Professional/Technical	-650	-1,450	1,100	2,450	-3,900	1,300	1,450
Labourers	-200	-450	100	600	-700	350	400
Non-construction trades	-50	-150	50	200	-300	100	150
Skilled trades - bricklaying	-100	-200	200	300	-600	150	250
Skilled trades - electrical	-450	-950	500	1,400	-1,900	700	850
Skilled trades - other occupations	-650	-1,600	700	2,200	-3,100	1,250	1,500
Skilled trades - painting and decorating	-150	-350	150	400	-650	250	300
Skilled trades - plumbing & HVAC	-200	-500	350	650	-1,050	350	450
Skilled trades - wood occupations	-400	-900	650	1,350	-2,150	700	850
Support staff - office based	-600	-1,300	850	2,100	-3,250	1,150	1,200
Total	**-4,250**	**-9,250**	**5,400**	**14,150**	**-21,050**	**7,450**	**8,750**

The gaps shown on Table 7 are across all of the occupational groups in each of the three local areas, indicating a general shortage of construction workers, rather than a particular occupational need. The local area with the biggest gap is the South East (Edinburgh, Lothians, and Borders) where supply of 36,700 is well short of the demand figure of 57,750.

The main point to be drawn from the gap analysis is that while the construction industry had the workforce to deliver work in 2022, work wasn't necessarily being met by workers in living in the same area, especially in the South East area.

The gap analysis in 2018 also highlighted this aspect, with the South East having a significant shortfall between supply and demand. We still see it as likely that this is being met by workers from adjacent areas such as Lanarkshire and Tayside, Forth & Fife travelling into the South East as most of the demand is focused in and around Edinburgh. The fact that there hasn't been a stronger surge in vacancies being advertised in the area in recent years, also indicates that the need for workers is in part being met.

The main point to be drawn from the gap analysis is that while the construction industry had the workforce to deliver work in 2022, work wasn't necessarily being met by workers in living in the same area, especially in the South East area.

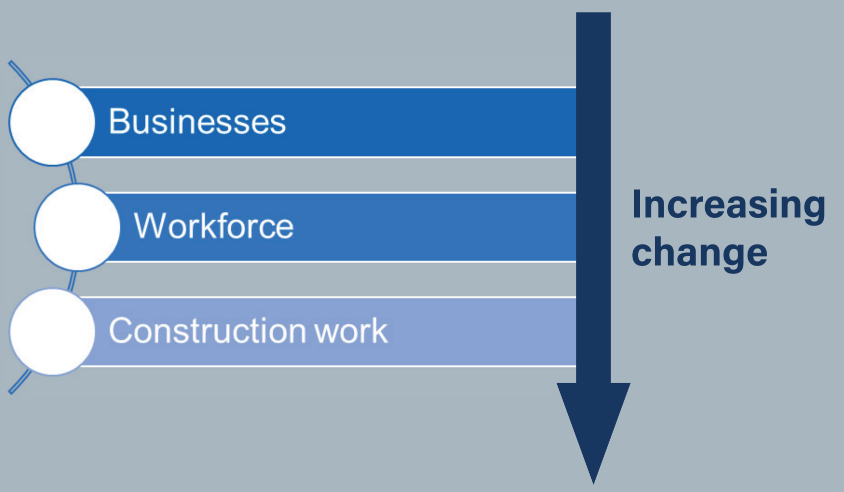
6. Conclusions and recommendations

Although the demand, supply and gap analysis carried out for the 2018 and this report isn't identical, there are still a number of conclusions and recommendations that can be made, especially when trends in job vacancy postings and workforce mobility are considered. The main points are that:

The assessment on the supply of workers compared to demand shows some consistency and some differences between the 2018 report and the 2023 update.

- **Aberdeen City and Shire:** while the workforce supply has reduced between the reports, there are still shortfalls in this area which is also reflected in the increased number of vacancies being advertised.
- **Lanarkshire and South West areas:** both are showing more supply than demand in these areas, which was the case in 2018, and the gap analysis figures have remained similar.
- **Tayside, Forth and Fife:** again, the workforce level has remained consistent, however there is now more supply than demand, whereas there were shortfalls in 2018. This looks to be due to a change in work demand for this area.
- **Highlands and Islands:** in 2018 there was a shortfall, whereas in 2022 supply and demand looks to be balanced. This is due to a combination of the workforce supply numbers increasing and the workforce demand levels reducing.
- **Glasgow and West:** in 2018, overall, there was slightly more supply than demand, although there were some occupational gaps. In the 2023 update there is a general shortage of workers, with all of the occupational groups having a gap between supply and demand. This is also reflected in the increased vacancy postings noted for the area which have been high for the last two years.
- **The South East (Edinburgh, Lothians, and Border districts)** continues to be an area where demand for workers out-strips supply. In 2018 this was one of two areas with a large shortfall, and in 2023 the gap has increased. There is clearly a demand for workers in this area, which far outstrips the local supply, however, when it comes to vacancy postings, the South East has trended below the overall figure for Scotland. With demand outstripping supply it is surprising that there hasn't been a stronger increase in vacancies being posted, unless the supply of workers is being met by people travelling in from other areas, such as Lanarkshire or Tayside, Forth & Fife.

With a gap of over four years between the two reports, changes in the distribution of construction work across different areas of Scotland is to be expected, due to the project-based nature of work. It is interesting to note that the pattern of business distribution has remained more constant, while there has been some shift in workforce location, indicating that in terms of relative changes, the construction workforce can flex to the work.



However, as the workforce mobility[12] research shows, construction workers have increasingly chosen to work closer to where they live, possibly limiting the extent to which they may look to travel for work in the future.

This along with the facts that construction workers in Scotland are developed from people that live in Scotland, and it is still difficult for companies to recruit staff, places increased importance on ensuring that there is training and development available that supports the construction industry.

The updated report complements the evidence base and together with other sources of labour market information, will hopefully help to inform regional skills action plans in Scotland. It is CITB's intention to update this work at regular periods, possibly every two years rather than annually, given the relative changes that have been observed in the workforce supply by local area, and future iterations will also look to cover apprenticeships and further education data.

Construction workers have increasingly chosen to work closer to where they live, possibly limiting the extent to which they may look to travel for work in the future.

12 CITB(2023) Workforce Mobility and Skills in the UK Construction Sector 2022 – Scotland Report

In terms of recommendations, some of the main points identified in the 2018 report are still pertinent in that;

1

The evidence base outlined in the 2023 update report is still a starting point for work with all relevant stakeholders to create regional skills action plans with the aim of maintaining the construction workforce at the right level with the right mix of skills. The labour market pressure companies have been facing looks set to continue therefore being able to recruit and develop the workforce, now and for the future is arguably more pressing now that it was in 2018, with job vacancy postings remaining at a high level and intense competition between industries to attract workers. It is important that construction companies look to expand their range of recruitment methods, tapping into the full extent of diversity in the working age population.

2

Having the right training infrastructure in place is vital now and for the future. The report notes that construction workers are mainly developed from within Scotland, therefore the appropriate infrastructure has to be in place to ensure that the workforce is developed with the skills required across all areas in Scotland.

3

Although not analysed in the 2023 updated report, apprenticeships continue to be vital to construction and the industry accounts for over a third of all apprentices in training across Scotland[13]. They offer clear career progression pathways and showcasing construction as an attractive proposition needs to continue at local levels and as an integral part of regional skills action plans. Building on the value and success of Scottish apprenticeships needs to continue and it is recognised that recruiting and retaining apprenticeships is a challenge across all areas.

4

Lastly, and by no means least of all, looking at local skills within Scotland necessitates making some decisions on area boundaries. While these boundaries can help up to better understand the dynamics around demand and supply, they shouldn't constrain approaches to skills development. There is evidently mobility in how supply can flex to meet demand, plus construction demand itself will change as the same structures won't be built in the same place all the time. It's therefore important to ensure that a collaborative process is adopted, recognising that workforce and skills development may cut across local boundaries while adapting to changing patterns of construction work.

What this report adds is an understanding that the construction industry in Scotland has continued to deliver value to the economy during challenging times. Being able to continue to do that, delivering a built environment in the future that is both energy efficient and sustainable, will require a workforce that is equipped with the appropriate skills and training. This is a long-term commitment that has to be facilitated by industry, government and stakeholders working in partnership, backed up with training infrastructure and skills plans to ensure that the workforce for the future is being developed today.

13 Skills Development Scotland (2023) Modern Apprenticeship Q3 2022/23 Statistics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