Workload Trends 2014 Q3

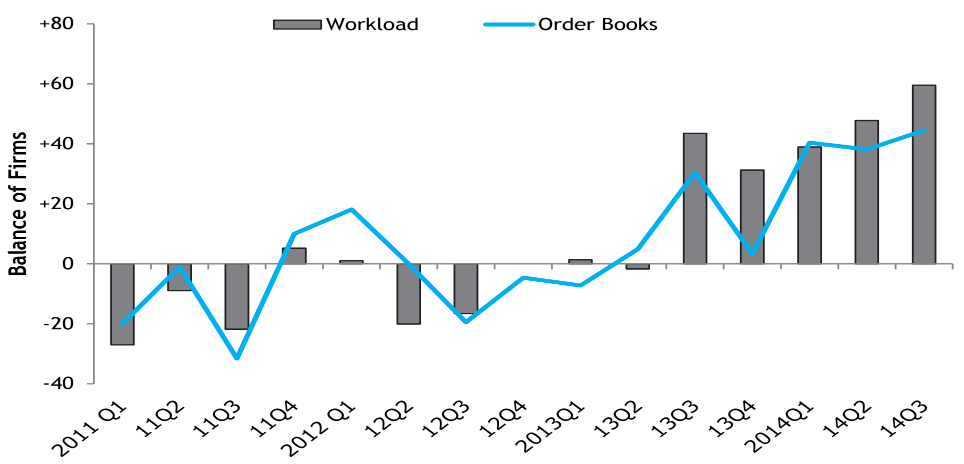
Optimism broadens across workloads, orders and employment

Weighted Balances (%)

Change on 12 Months Ago	
Workload	
2013 Q3	+44
2014 Q3	+60
Tender Prices	
New Work	
2013 Q3	+26
2014 Q3	+69
R&M Work	
2013 Q3	+22
2014 Q3	+58
Order Books	
2013 Q3	+30
2014 Q3	+45
Over the Next 12 Months	
Expected Workload	
2013 Q3	+40
2014 Q3	+72
Expected Orders	
New Work	
2013 Q3	+50
2014 Q3	+69
R&M Work	
2013 Q3	+29
2014 Q3	+39

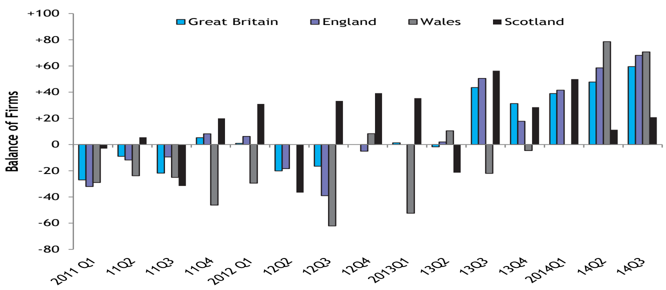
- Workloads increased, on balance, for a fifth quarter in Q3. In Great Britain, 60% of firms, on balance, reported that workloads had increased.
- 9 out of 10 sectors reported growth in workloads, on balance. Workloads were reported to have declined for 45% of firms in the airports sector, on balance.
- Workload and employment expectations in the next 12 months were at their highest levels since 2008 in all nations.
- Tender prices were higher, on balance, for 69% of firms for new construction work and 58% of firms for repair and maintenance.
- The supply of skilled operatives was the largest concern for firms in England and Scotland.

Change in Workloads and Order Books - Great Britain



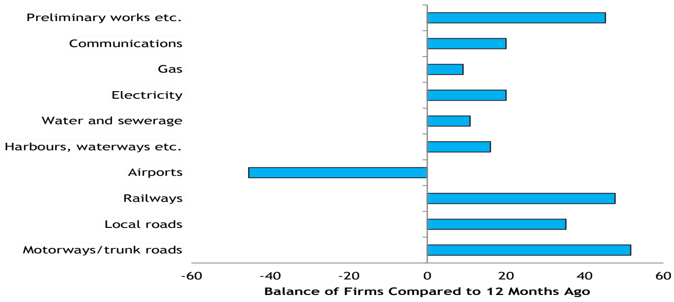
Trends in Workload

Workloads Compared to 12 Months Ago



Workloads increased, on balance, for a fifth quarter in Q3. In Great Britain 60% of firms on balance, reported that workloads had increased. Overall, only 8% of firms reported that workloads had declined. In England, 2% of respondents reported that workloads had fallen, compared to 10% in Q1 and 4% in Q2. In England, 68% of firms, on balance, reported an increase, compared to 59% in Q2. In Scotland, 33% of firms reported that workloads were unchanged on a year earlier and 44% reported that workloads were higher, leaving a positive overall balance of 21%. In Wales, 71% of firms, on balance, reported an increase in workloads.

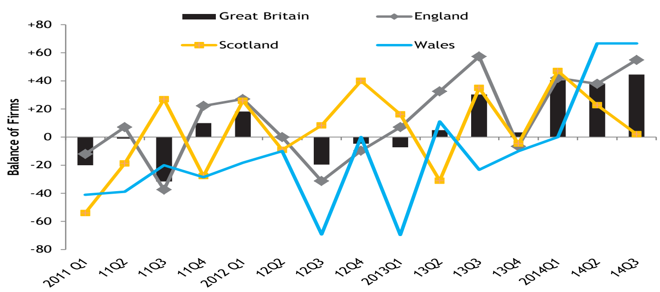
Workload — By Type of Work (GB)



Only the airports sector reported that workloads decreased compared to Q3 last year. 45% of firms in the sector, on balance, reported that workloads were lower than a year ago. Motorways/trunk roads was the strongest sector for improved workloads as 52% of firms in the sector, on balance, reported an increase, up from 26% in Q2. The railways (48%), preliminary works (45%) and local roads (35%) sectors also reported strong growth in the third quarter, on balance. Firms in the electricity, communications and harbours/waterways sectors also reported higher workloads in Q3, resulting in positive overall balances of 20%, 20% and 16%, respectively in the quarter.

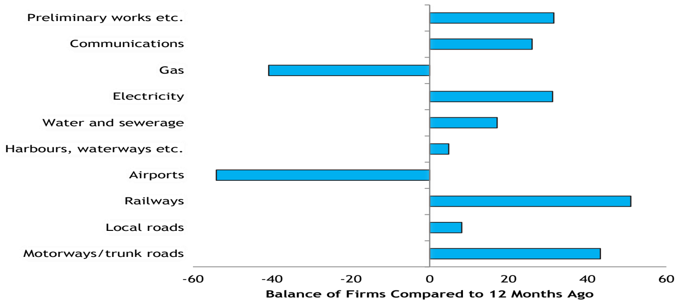
Trends in Orders and Future Expectations

Orders Compared to 12 Months Ago



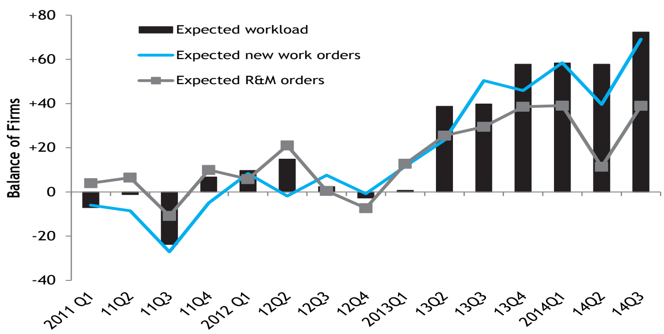
45% of firms, on balance, reported growth in orders in Q3, compared to 38% in Q2. 11% of respondents reported that orders had decreased, the lowest since 2011 Q2. Orders increased according to 55% of firms, on balance, in England. In Scotland, only 2% of respondents, on balance, reported growth in Q3, compared to 23% in Q2. In Wales, the balance of firms reporting a change in orders compared to 12 months ago remained at 67%, the same as Q2, but this was a sharp improvement following a zero balance in Q1. 15% of firms in Wales and 23% of firms in Scotland reported a fall in orders in Q3

Order Books — By Type of Work (GB)



Eight sectors reported an increase in orders compared to 12 months ago, on balance, in Q3. The sectors reporting the highest balances were railways (51%), motorways/trunk roads (43%), electricity (31%) and preliminary works (31%). Railways and preliminary works have recorded strong balances for the last six quarters since 2013 Q2. In the airports sector, 54% of respondents, on balance, reported a decrease in orders. This was the largest decrease since 2010 Q2. Similarly, a balance of 41% of firms in the gas sector reported falling orders, which was the lowest balance recorded in four years.

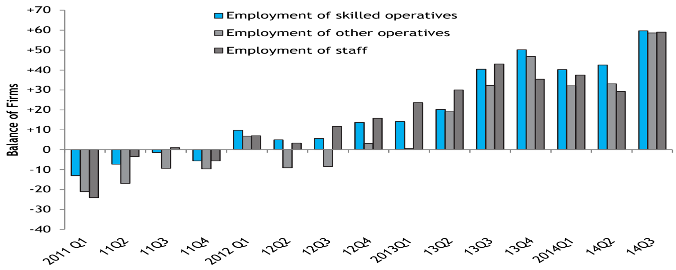
Expected Future Trends in the Next 12 Months



Expected future trends improved in Great Britain for a seventh consecutive quarter. On balance, 72% of firms reported that workloads are expected to increase in the next 12 months, up from 58% in the previous three quarters. In England, 73% of firms, on balance, expect workloads to increase. In Scotland and Wales, these balances were 54% and 86%, respectively. This was up from a balance of -4% in Q2 in Wales. 69% of British firms expect new work orders to be higher in the next 12 months on balance. By nation; England (72%), Scotland (48%) and in Wales (86%). For R&M orders, 39% of British firms, on balance, expect an increase during the next 12 months. This figure is 37% for English firms, 38% for Scottish firms and 54% for Welsh firms, on balance.

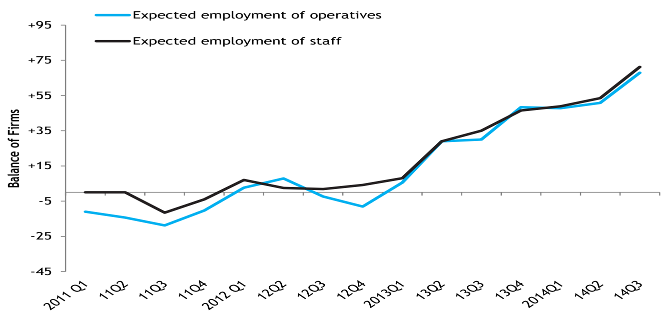
Trends in Employment

Employment Compared to 12 months Ago (GB)



Employment data showed a continued improvement in Q3. In Britain, on balance, employment of skilled operatives, other operatives and staff improved according to 60%, 59% and 59% of firms respectively. For English firms, employment increased, on balance, according to 76% of firms for skilled operatives, 70% for other operatives and 78% for staff. In Wales, a balance of 52% was reported for skilled operatives and 66% for other operatives and staff. In Scotland, on balance, increases were reported by 24% of firms for skilled operatives, 24% for other operatives and 8% for staff.

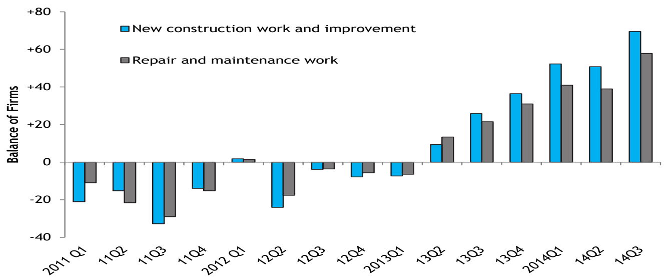
Expected Employment in the Next 12 Months



On balance, 68% of firms in Britain expect the employment of operatives to increase and 71% expect the employment of staff to increase in the next 12 months. In England, on balance, nearly two-thirds of all respondents expect employment of operatives (65%), and employment of staff (70%), to increase. Prospects improved in Wales compared to Q2. On balance, operatives and staff employment is expected to increase according to 84% of respondents, compared to 4% of firms in the previous quarter. In Scotland, on balance, 63% of respondents expect employment to increase for operatives and 66% for staff.

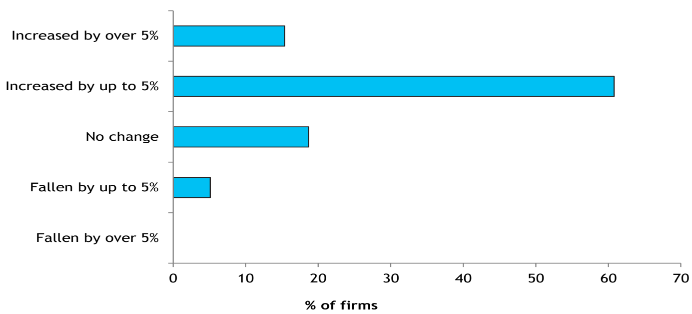
Trends in Costs, Tender Prices and Supply Constraints

Tender Prices Compared to 12 Months Ago (GB)



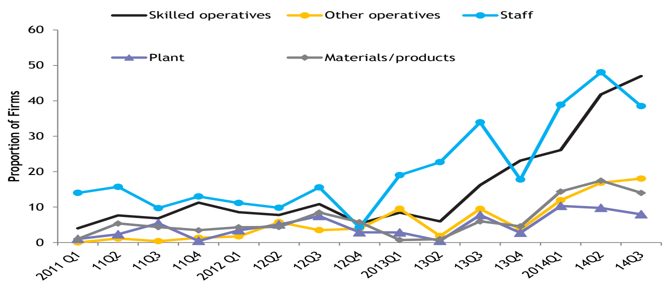
Compared to 12 months ago, tender prices were higher, on balance, for 69% of firms for new construction work and improvement, and 58% of firms for repair and maintenance work. In England, 69% of firms, on balance, reported higher tender prices for new construction work and improvement and 50% for repair and maintenance. In Wales, 86% of firms, on balance, reported an increase in tender prices for new construction and improvement and 81% of firms for repair and maintenance. In Scotland, on balance, 42% of respondents reported an increase in new construction work and improvement and 34% in repair and maintenance.

Costs Compared with 12 Months Ago (GB)



61% of firms in Great Britain reported in Q3 that costs increased by up to 5% compared to 12 months earlier and 15% reported increases of over 5%. Overall, on balance, 71% of firms reported an increase in costs. In England, 78% of firms, on balance, reported an increase in costs. 19% reported rises of more than 5%, 59% by up to 5% and 22% reported no change. In Scotland, costs increased, on balance, according to 74% of firms, and 4% of firms reported cost increases of more than 5%, compared to 16% in Q2. In Wales, 80% of firms, on balance, reported an increase in costs over the last 12 months. 16% of firms reported no change and 82% reported increases up to 5%.

Contractors Unsatisfied with Supply (GB)



Overall, the supply of suitable workers worsened compared to the first and second quarters of 2014 for civil engineering firms in Great Britain. 47% and 18% of respondents reported dissatisfactory supply of skilled operatives and other operatives, respectively. The percentage reporting dissatisfaction for staff decreased from Q2, however. 38% reported dissatisfaction compared to 48% last quarter, 8% of firms reported dissatisfaction with plant and 14% reported dissatisfaction with materials/products. The most commonly reported dissatisfaction was skilled operatives in England (47%) and Scotland (46%). In Wales, 64% of firms reported dissatisfaction with supply of staff.

Workload Trends Survey

1 Workload

1 Workload	Q3	Q4	2011 Q1	Q2	Q3	Q4	2012 Q1	Q2	Q3	Q4	2013Q1	Q2	Q3	Q4	2014Q1	Q2	Q3
Compared with 12 Months Ago																	
By Country																	
GB	-32	-20	-27	-9	-22	+5	+1	-20	-17	0	+1	-2	+44	+31	+39	+48	+60
England	-26	-18	-32	-12	-9	+8	+6	-18	-39	-5	0	+2	+51	+18	+42	+59	+68
Scotland	-35	-32	-3	+6	-32	+20	+31	-37	+33	+39	+35	-21	+56	+29	+50	+11	+21
Wales	-70	-24	-29	-24	-25	-46	-29	0	-62	+8	-52	+11	-22	-5	0	+79	+71
By Size of Firm																	
<115	-31	-23	-38	-11	-12	-10	-18	-28	-8	+8	-10	+6	+41	+47	+13	+21	+29
115-299	-59	-29	-10	0	0	-14	+8	+5	+27	-22	+13	0	+64	+18	+75	+38	+17
300-599	-20	0	0	0	-29	-33	+33	0	0	-20	+60	-50	0	+38	+33	+67	+100
600+	-16	-16	-35	-13	-35	+49	0	-33	-51	+7	-7	+8	+53	+27	+39	+55	+77
By Type of Work																	
Motorways & trunk roads	-40	-73	-61	-54	-58	-37	-43	-53	-37	-33	-34	-6	+7	+13	+21	+26	+52
Local roads	-49	-29	-37	-43	-30	-41	-30	-42	-50	-30	-27	-32	+2	-6	-9	+9	+35
Railways	-17	-2	+24	+8	+15	+41	+32	+52	+21	+53	+28	+69	+54	+51	+45	+43	+48
Airports	-18	-26	-23	-15	-14	-1	-23	-5	+2	-17	-1	+18	+4	-2	-16	+13	-45
Harbours, waterways etc.	-32	-30	-19	-27	-11	-10	-3	+11	-15	-7	-5	+14	-4	+13	+3	+21	+16
Water & sewerage	-23	-15	+23	+14	+23	+12	+8	+23	+27	+1	+20	+24	+23	+20	+2	+5	+11
Electricity	-4	+35	+17	+61	+20	-4	+41	+28	+19	+8	+10	+16	+24	+6	+20	+17	+20
Gas	+6	-24	-20	-22	-28	-18	+14	-2	+24	+1	-25	+2	-2	+2	-26	+21	+9
Communications	-10	-7	-28	-63	-41	-35	-23	+1	-13	-34	-35	-4	-2	+22	0	+14	+20
Preliminary works, etc.	-26	-23	-8	-17	-13	-15	+3	-7	-10	-12	-8	+15	+30	+40	+48	+36	+45

Weighted % Balance of Respondents

2 Expected Workload

2 Expected Workload	Q3	Q4	2011 Q1	Q2	Q3	Q4	2012 Q1	Q2	Q3	Q4	2013Q1	Q2	Q3	Q4	2014Q1	Q2	Q3
In the Next 12 Months																	
By Country																	
GB	-36	-10	-7	-1	-24	+7	+10	+15	+2	-3	+1	+39	+40	+58	+58	+58	+72
England	-34	-10	-9	+9	-25	+9	+16	+27	+10	+4	+22	+55	+68	+61	+63	+73	+73
Scotland	-27	+5	+5	-13	+19	+8	-6	0	+8	-12	-5	+21	+14	+47	+50	+52	+54
Wales	-79	-25	-23	-9	-35	-47	+8	-18	-52	-22	-66	+3	+4	+10	+22	-4	+86
By Size of Firm																	
<115	-45	-27	-18	+11	-16	-7	+5	-10	-9	-8	-6	+11	+38	+56	+33	+43	+56
115-299	-22	+7	+8	-8	-4	+5	0	+4	+19	+14	+22	+42	+75	+55	+44	+69	+41
300-599	-29	0	0	-14	-13	-13	+11	+21	+11	-10	-14	+29	-10	+38	+63	+100	+100
600+	-33	-11	-12	-1	-39	+24	+17	+30	0	-3	0	+52	+45	+66	+68	+52	+84

Weighted % Balance of Respondents

3 Order Books

3 Order Books	Q3	Q4	2011 Q1	Q2	Q3	Q4	2012 Q1	Q2	Q3	Q4	2013Q1	Q2	Q3	Q4	2014Q1	Q2	Q3
Compared with 12 Months Ago																	
By Country																	
GB	-38	-9	-20	-1	-32	+10	+18	0	-20	-5	-7	+5	+30	+3	+40	+38	+45
England	-31	-6	-12	+7	-37	+22	+27	0	-31	-10	+7	+33	+57	-7	+42	+38	+55
Scotland	-46	-10	-54	-19	+27	-28	+26	-9	+8	+40	+16	-31	+35	-5	+47	+23	+2
Wales	-70	-34	-41	-39	-20	-29	-18	-10	-69	0	-70	+11	-23	-10	0	+67	+67
By Size of Firm																	
<115	-27	-23	-35	-11	-15	-2	-14	-12	-14	-4	-21	+13	+30	+35	0	+21	+19
115-299	-52	-24	-26	-13	-5	-16	-21	+10	+17	-6	+24	+8	+45	+18	+50	+23	+29
300-599	-35	0	+33	+20	+14	-50	+57	+25	-13	-25	0	-43	+11	+14	+40	+67	+100
600+	-35	+4	-5	+3	-63	+66	+35	-9	-40	0	-10	+18	+33	-13	+50	+44	+52
By Type of Work																	
Motorways & trunk roads	-62	-76	-74	-46	-58	-23	-22	-35	-46	-21	-20	+9	-1	-8	+26	+31	+43
Local roads	-56	-31	-39	-42	-36	-39	-32	-43	-45	-18	-34	-16	-3	-8	-8	+21	+8
Railways	-51	+5	+14	+12	+15	+36	+32	+49	+7	+36	0	+63	+50	+30	+32	+49	+51
Airports	-53	-27	-17	+11	-16	+18	-11	+2	-5	+16	+10	+20	+4	-10	-1	+27	-54
Harbours, waterways etc.	-32	-19	-15	-27	-18	+1	-7	+5	-14	-6	-9	+11	+1	+20	+6	+15	+5
Water & sewerage	-23	+1	+22	+5	+9	+11	-1	+27	+22	-26	+2	-1	0	+1	-1	+9	+17
Electricity	-1	+25	+30	+22	+9	0	+22	+12	+27	+14	+27	-2	+28	-3	+12	+54	+31
Gas	-49	-19	-19	-31	-31	+1	-2	-8	+34	-19	-12	+18	-4	+18	-18	+14	-41
Communications	-16	-20	-2	-27	-30	-60	-33	-25	-13	-41	-49	-8	-9	+21	-3	+36	+26
Preliminary works, etc.	-25	-25	-24	-25	-26	-27	+2	-22	-20	+1	+3	+14	+26	+35	+22	+45	+31

Weighted % Balance of Respondents

4 Expected Trends in New Orders

4 Expected Trends in New Orders	Q3	Q4	2011 Q1	Q2	Q3	Q4	2012 Q1	Q2	Q3	Q4	2013Q1	Q2	Q3	Q4	2014Q1	Q2	Q3
In the Next 12 Months																	
New Work																	
By Country																	
GB	-39	-25	-6	-8	-27	-5	+8	-2	+8	-1	+12	+24	+50	+46	+58	+40	+69
England	-33	-26	-3	-6	-32	-5	+15	+7	+26	+17	+39	+45	+64	+44	+63	+48	+72
Scotland	-46	+10	-3	-9	+31	+15	-9	-12	+2	-17	+7	-2	+16	+41	+38	+30	+48
Wales	-82	-52	-29	-9	-39	-58	+4	-9	-39	-11	-69	-33	+31	+10	+22	0	+86
By Size of Firm																	
<115	-46	-31	-15	+2	-23	0	+11	-22	-9	-14	-8	+9	+30	+48	+33	+37	+43
115-299	-22	0	-5	-8	+7	-22	-13	+8	+6	+9	+26	+26	+75	+45	+50	+56	+41
300-599	-49	0	+25	0	-13	-13	+11	+7	+22	-10	+14	+14	0	+50	+43	+100	+100
600+	-33	-40	-7	-15	-48	+3	+17	0	+13	+8	+15	+31	+66	+44	+71	+26	+82
R&M																	
By Country																	
GB	-24	-13	+4	+6	-11	+10	+6	+21	+0	-7	+13	+25	+29	+39	+39	+11	+39
England	-15	-11	+1	+22	+1	+17	+22	+38	+22	+11	+24	+43	+40	+49	+51	+25	+37
Scotland	-39	-27	+17	+19	+11	-13	-19	+7	-15	-41	+10	+5	+4	+4	+31	+2	+38
Wales	-70	-25	-5	-14	-39	-23	-21	-31	-61	-36	-77	-26	+7	-18	-11	-33	+54
By Size of Firm																	
<115	-42	-25	+3	+4	-19	+2	+2	-14	-22	-17	-16	-4	+31	+37	+10	+20	+37
115-299	-22	0	0	-8	-13	-10	-14	-5	+20	-14	+9	+6	+42	+45	+18	+40	+44
300-599	-39	0	0	0	-25	-29	-11	+14	-11	-29	-17	+14	-22	+33	+38	+43	+67
600+	-5	-15	+7	+16	-3	+37	+24	+56	+13	+8	+33	+51	+42	+38	+53	-3	+33

Weighted % Balance of Respondents

5 Employment

	Q3	Q4	2011 Q1	Q2	Q3	Q4	2012 Q1	Q2	Q3	Q4	2013Q1	Q2	Q3	Q4	2014Q1	Q2	Q3
Compared with 12 Months Ago																	
By Country																	
Skilled operatives																	
GB	-30	-27	-13	-7	-1	-6	+10	+5	+6	+14	+14	+20	+40	+50	+40	+43	+60
England	-27	-23	-16	-14	-1	-7	0	+1	0	+9	+7	+35	+65	+42	+43	+55	+76
Scotland	-31	-42	-5	+6	+7	-4	+8	-14	+24	+23	+41	+7	+36	+42	+58	+26	+24
Wales	-56	-42	-11	-13	+5	-21	+4	+41	-29	+39	-3	+17	-31	+22	0	+4	+52
Other operatives																	
GB	-38	-29	-21	-17	-9	-10	+7	-9	-8	+3	+1	+19	+32	+47	+32	+33	+59
England	-33	-25	-26	-22	-8	-6	-1	-22	-18	-3	-4	+29	+48	+29	+35	+39	+70
Scotland	-37	-52	-7	-19	-5	-46	0	-14	+8	+16	+19	+23	+37	+63	+39	+17	+24
Wales	-82	-44	-11	-29	-9	-32	+4	+25	-35	+28	-7	+17	-33	+4	0	+4	+66
Staff																	
GB	-36	-21	-24	-3	+1	-6	+7	+3	+12	+16	+24	+30	+43	+35	+37	+29	+59
England	-36	-19	-18	-6	-4	-6	-1	-5	+3	+5	+20	+44	+67	+37	+42	+40	+78
Scotland	-34	-40	-51	0	+36	0	0	-7	+34	+18	+35	+17	+46	+17	+56	+10	+8
Wales	-43	-29	-6	-4	+4	-53	-26	+18	-19	+33	+7	+20	-33	+26	+22	-15	+66
By Size of Firm																	
Skilled operatives																	
<115	-31	-23	-20	0	-6	-5	-2	-16	-14	+13	-4	-4	+26	+44	+25	+18	+30
115-299	-26	-35	-5	-16	+15	-22	+4	+12	+18	+17	+18	+30	+60	+41	+44	+56	+33
300-599	-26	-25	-50	+14	0	-13	+33	+7	0	+20	+29	-25	+30	+13	+56	+75	+43
600+	-38	-24	-9	-12	-6	+4	+10	+12	+16	+11	+19	+41	+44	+65	+40	+40	+81
Other operatives																	
<115	-31	-25	-13	-9	-10	-10	-9	-21	-14	+3	-13	0	+19	+36	+19	+36	+30
115-299	-52	-43	-22	-40	-4	-18	-4	+8	+6	0	+14	+37	+48	+20	+56	+56	+33
300-599	-26	-25	-50	-14	-11	-38	+22	0	+11	+10	+29	-13	+20	+25	+38	+75	+57
600+	-38	-24	-21	-12	-11	+4	+15	-14	-20	+2	-3	+30	+36	+65	+30	+18	+76
Staff																	
<115	-25	-4	-13	0	0	-12	-9	-6	-5	+1	+8	+7	+14	+28	+21	+14	+32
115-299	-34	-32	-13	-24	+7	-4	-9	+28	+18	+30	+18	+35	+57	+41	+39	+56	+33
300-599	-14	-25	-75	0	0	-13	+22	-7	+22	+30	+43	-13	+40	+13	+44	+63	+71
600+	-36	-24	-16	+2	-1	0	+17	+3	+16	+14	+28	+51	+51	+43	+40	+21	+74

Weighted % Balance of Respondents

6 Expected Employment

	Q3	Q4	2011 Q1	Q2	Q3	Q4	2012 Q1	Q2	Q3	Q4	2013Q1	Q2	Q3	Q4	2014Q1	Q2	Q3
In the Next 12 Months																	
By Country																	
Operative jobs																	
GB	-31	-6	-11	-14	-19	-10	+3	+8	-2	-8	+6	+29	+30	+48	+48	+51	+68
England	-23	-2	-10	-12	-24	-18	+4	+16	+7	-1	+21	+53	+65	+53	+49	+58	+65
Scotland	-49	-5	0	-28	+10	+13	-6	-2	-6	-10	-6	+10	+18	+31	+45	+49	+63
Wales	-70	-38	-41	-18	-26	-47	+4	-27	-48	-28	-24	+3	-16	+5	+28	-4	+84
Employment of staff																	
GB	-26	+3	0	0	-12	-4	+7	+3	+2	+4	+8	+29	+35	+47	+49	+54	+71
England	-15	+7	0	+4	-22	-5	+12	+11	+9	+12	+23	+51	+63	+37	+62	+63	+70
Scotland	-56	0	0	+6	+21	+8	-9	-17	+6	-12	-4	+12	+16	+48	+34	+51	+66
Wales	-61	-21	-12	-9	-22	-47	0	-18	-42	-11	-17	0	-11	+5	+17	-4	+84
By Size of Firm																	
Operative jobs																	
<115	-25	-21	-28	+7	-11	-3	-7	-7	-13	-8	0	+2	+33	+46	+29	+41	+34
115-299	-34	-4	0	-29	0	-5	+4	0	+6	+9	+13	+37	+60	+55	+50	+63	+56
300-599	-43	0	+25	-29	-25	-25	+11	+7	0	-30	-29	+14	0	+38	+63	+86	+100
600+	-25	0	-16	-15	-28	-13	+4	+20	0	-7	+13	+42	+29	+50	+50	+45	+76
Employment of staff																	
<115	-23	-7	-15	+11	-7	-7	-2	-7	-7	-3	+1	+15	+27	+41	+25	+27	+29
115-299	-36	+4	+13	-17	+4	0	+4	+8	+13	+14	+9	+32	+65	+59	+33	+56	+63
300-599	-32	0	+25	-29	-13	-25	+11	-7	+11	-10	0	0	+10	+38	+63	+100	+100
600+	-12	+10	-5	+8	-20	+3	+12	+10	0	+11	+13	+42	+37	+47	+57	+52	+81

Weighted % Balance of Respondents

7 Costs

	Q3	Q4	2011 Q1	Q2	Q3*	Q4	2012 Q1	Q2	Q3	Q4	2013Q1	Q2	Q3	Q4	2014Q1	Q2	Q3
Compared with 12 Months Ago (%)																	
GB																	
Falling	+9	+4	+6	+5	+3	+0	0	+1	+0	+4	+8	0	+1	0	0	0	0
Unchanged	+31	+19	+18	+12	+15	+1	+4	+11	+3	+1	+0	+6	+5	+3	0	0	+5
Slower	+30	+29	+9	+13	+26	+27	+22	+23	+22	+23	+20	+23	+18	+25	+10	+15	+19
Same rate	+25	+31	+25	+33	+45	+62	+64	+55	+69	+61	+61	+66	+72	+62	+75	+77	+61
Faster	+6	+18	+42	+37	+12	+10	+10	+10	+6	+11	+10	+5	+4	+9	+15	+9	+15
Cost Balances																	
By Country																	
GB	+52	+74	+70	+78	+40	+70	+70	+54	+71	+67	+63	+64	+71	+68	+90	+85	+71
England	+54	+80	+70	+72	+42	+72	+73	+48	+77	+68	+62	+70	+75	+65	+90	+88	+78
Scotland	+40	+9	+67	+88	+49	+54	+58	+53	+70	+57	+81	+62	+76	+42	+86	+77	+74
Wales	+47	+92	+76	+96	+70	+63	+72	+50	+87	+78	+10	+10	+38	+96	+83	+96	+80
By Size of Firm																	
<115	+77	+91	+79	+91	+69	+79	+75	+66	+68	+78	+82	+74	+71	+82	+79	+86	+84
115-299	+37	+61	+77	+76	+63	+65	+57	+44	+47	+70	+82	+74	+81	+70	+83	+94	+81
300-599	+43	+50	+75	+100	+50	+50	+89	+67	+67	+70	+86	+57	+80	+75	+63	+75	+83
600+	+27	+76	+67	+69	+13	+73	+67	+46	+84	+59	+44	+58	+66	+60	+100	+86	+62

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

8 Tender Prices

8 Tender Prices	Q3	Q4	2011 Q1	Q2	Q3	Q4	2012 Q1	Q2	Q3	Q4	2013Q1	Q2	Q3	Q4	2014Q1	Q2	Q3
Compared with 12 Months Ago																	
New work																	
By Country																	
GB	-74	-45	-21	-15	-33	-14	+2	-24	-4	-8	-7	+9	+26	+36	+52	+51	+69
England	-76	-42	-17	-30	-35	-14	-7	-29	-4	-11	-12	+24	+21	+23	+56	+40	+69
Scotland	-66	+62	-23	+6	-21	-38	-23	-29	-28	-5	+2	+7	+10	+40	+13	+39	+42
Wales	-70	-56	-35	-29	-52	-53	+4	-73	+20	-61	-86	-63	+4	+5	+53	+73	+86
By Size of Firm																	
<115	-51	-47	-11	-9	-21	-3	-13	-23	-25	-9	-1	+23	+29	+29	+24	+45	+35
115-299	-77	-42	-18	-8	-26	-23	0	-38	-25	+18	+13	0	+37	+36	+56	+69	+56
300-599	-57	-50	-50	+29	-38	-63	+11	+13	-33	-40	-14	-29	-20	+13	+29	+57	+100
600+	-100	-45	-7	-29	-40	0	+7	-37	+29	-6	-15	+17	+34	+46	+64	+47	+79
R&M																	
By Country																	
GB	-58	-38	-11	-22	-29	-15	+1	-18	-4	-6	-6	+13	+22	+31	+41	+39	+58
England	-58	-34	-5	-30	-22	-17	-13	-25	0	-12	-19	+23	+11	+20	+46	+29	+50
Scotland	-57	-74	-28	-7	-54	-36	-16	-21	-24	-5	+13	+8	+2	+23	+28	+36	+34
Wales	-57	-42	-29	-13	-43	-46	+24	-44	-16	-38	-62	-58	+14	+10	+53	+62	+81
By Size of Firm																	
<115	-45	-43	-19	-7	-13	0	-12	-16	-9	-8	-3	+18	+16	+24	+17	+27	+26
115-299	-69	-42	-18	-19	-30	-26	-5	-30	-14	+14	0	-13	+30	+41	+60	+60	+38
300-599	-32	-33	0	0	-38	-57	+25	+21	-33	-29	0	-33	0	+13	+43	+50	+83
600+	-79	-33	+7	-34	-34	-8	+3	-31	+18	-6	-11	+33	+28	+35	+44	+36	+71

Weighted % Balance of Respondents

9 Supply of Resources Required

9 Supply of Resources Required	Q3	Q4	2011 Q1	Q2	Q3	Q4	2012 Q1	Q2	Q3	Q4	2013Q1	Q2	Q3	Q4	2014Q1	Q2	Q3
Skilled Operatives																	
GB	5	3	4	8	7	11	9	8	11	5	8	6	16	23	26	42	47
England	5	2	5	10	5	15	8	11	6	5	6	3	3	16	23	47	47
Scotland	7	0	3	13	18	0	13	5	10	14	17	12	40	43	35	33	46
Wales	0	8	0	4	0	0	12	9	35	0	0	0	31	19	33	11	32
Other Operatives																	
GB	2	1	0	1	0	1	2	6	3	4	10	2	9	4	12	17	18
England	2	1	1	1	0	0	0	10	3	7	10	2	5	6	18	27	11
Scotland	2	0	0	0	0	0	10	0	6	0	12	5	10	5	10	16	21
Wales	0	0	0	0	0	0	0	0	0	0	14	0	20	0	0	0	30
Staff																	
GB	1	17	14	16	10	13	11	10	16	4	19	23	34	18	39	48	38
England	1	20	19	10	5	19	14	15	13	4	13	24	23	11	39	53	26
Scotland	0	0	0	34	41	0	3	5	0	2	28	3	32	26	40	40	33
Wales	0	8	0	0	0	0	12	0	35	11	0	7	44	19	33	41	64
Plant																	
GB	2	1	1	2	5	0	3	5	7	3	3	0	8	3	10	10	8
England	3	0	1	1	8	1	0	6	12	2	0	1	3	1	9	12	6
Scotland	0	0	0	13	0	0	5	0	2	2	10	0	14	3	3	12	4
Wales	0	4	0	0	0	0	0	0	0	22	0	0	20	19	0	0	0
Materials and Products																	
GB	2	2	1	5	4	3	4	4	8	6	1	1	6	5	14	17	14
England	0	1	1	6	7	5	2	7	13	11	1	1	2	5	16	17	22
Scotland	10	0	3	16	0	0	3	2	8	0	1	3	6	3	3	14	2
Wales	0	4	0	4	0	0	0	0	0	0	0	0	20	0	0	0	0

% of Respondents Reporting Unsatisfactory Availability of Resources

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

The number of contractors taking part in CECA's 2014 Q3 survey totalled 100. The survey responses are weighted by size of firm to ensure that results are representative of the industry. The results displayed are typically weighted balances and are calculated by taking the difference between firms reporting an increase in workloads, for example, and the proportion of firms experiencing a fall.

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

Enquiries to: Huston Gilmore, CECA, 1 Birdcage Walk, London SW1H 9JJ T: 020 7340 0454
E-mail: hustongilmore@ceca.co.uk, Website: www.ceca.co.uk