Workload Trends 2014 Q4

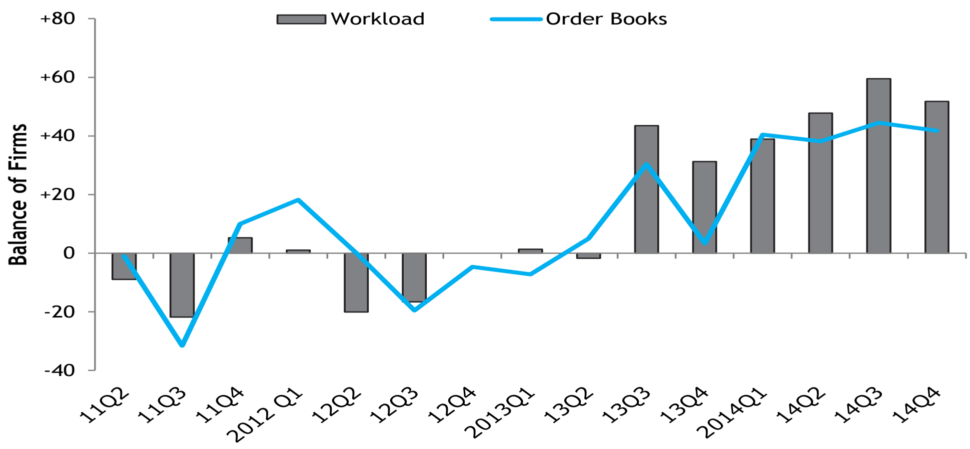
Continued increases in workload, orders and employment

Weighted Balances (%)

Change on 12 Months Ago	
Workload	
2013 Q4	+31
2014 Q4	+52
Tender Prices	
New Work	
2013 Q4	+36
2014 Q4	+79
R&M Work	
2013 Q4	+31
2014 Q4	+59
Order Books	
2013 Q4	+3
2014 Q4	+42
Over the Next 12 Months	
Expected Workload	
2013 Q4	+58
2014 Q4	+49
Expected Orders	
New Work	
2013 Q4	+46
2014 Q4	+50
R&M Work	
2013 Q4	+39
2014 Q4	+26

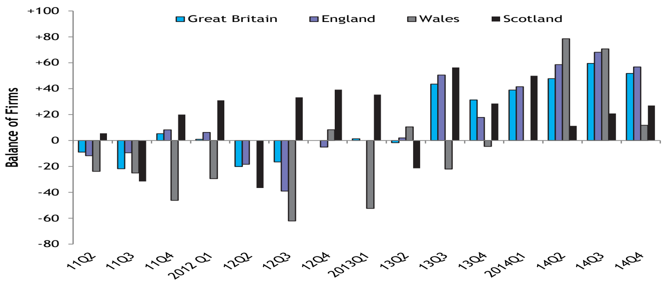
- Workloads increased, on balance, for a sixth quarter in Q4. In Great Britain, 52% of firms, on balance, reported that workloads had increased.
- 6 out of 10 sectors reported growth in workloads, on balance.
- Costs and tender prices continue to rise across all nations
- Tender prices were higher, on balance, for 79% of firms for new construction work and 59% 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



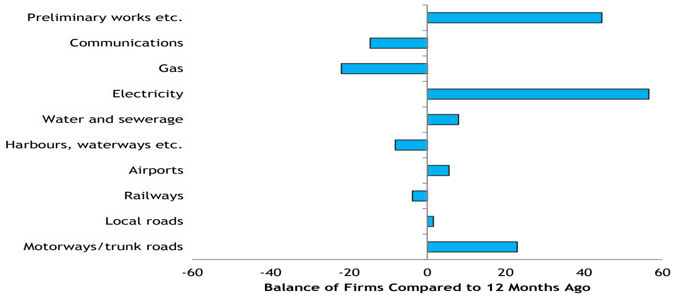
Trends in Workload

Workloads Compared to 12 Months Ago



Workloads increased, on balance, for a sixth quarter in Q4. In Great Britain 52% of firms on balance, reported that workloads had increased. Overall, only 7% of firms reported that workloads had declined. In England, 3% of respondents reported that workloads had fallen, compared to 27% in 2013. In England, 57% of firms, on balance, reported an increase, compared to 68% in Q3. In Scotland, 30% of firms reported that workloads were unchanged on a year earlier and 49% reported that workloads were higher, leaving a positive overall balance of 27%. In Wales, only 12% of firms, on balance, reported an increase in workloads.

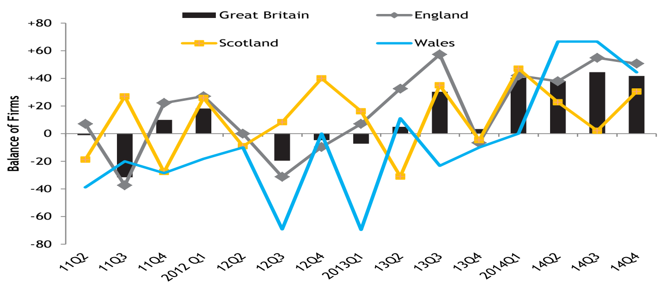
Workload — By Type of Work (GB)



6 out of 10 sectors reported growth in workloads, on balance. Electricity and preliminary works were the strongest sectors for improved workloads as 57% and 45% of firms in the sector respectively, reported positive growth on balance. The motorways/trunk roads (23%), water and sewerage (8%), and local roads (2%) sectors were all positive in Q2 and Q3 and, also remained positive in the fourth quarter, on balance. After a negative outcome in the third quarter, 6% of firms in the airports sector reported growth in Q4, on balance. Railways (-4%), harbours and water ways(-8%), gas (-22%) and communications (-15%), reported falling workloads in Q4, following positive balance in Q3.

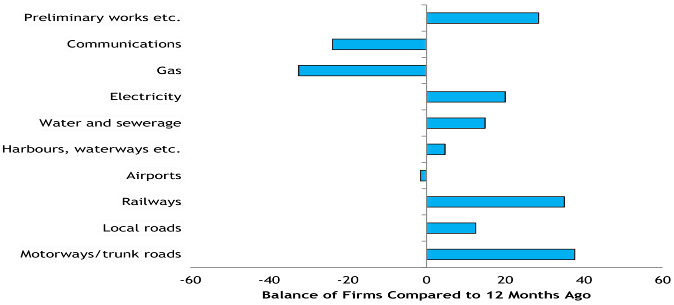
Trends in Orders and Future Expectations

Orders Compared to 12 Months Ago



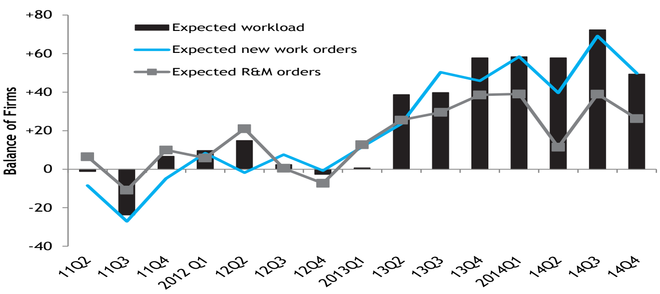
42% of firms, on balance, in Great Britain reported growth in orders in Q4, compared to 45% in Q3. However, 13% of respondents reported that orders had declined. Orders increased according to 51% of firms, on balance, in England. In England, only 4% of respondents reported a decline in orders in Q4, the same as Q3. In Scotland, 30% of respondents, on balance, reported growth in Q4, compared to only 2% in Q3. In Wales, the balance of firms reporting a change in orders compared to 12 months ago was to 44%. 22% of firms in Wales and 26% of firms in Scotland reported a fall in orders in Q4

Order Books — By Type of Work (GB)



Seven sectors reported an increase in orders compared to 12 months ago, on balance, in Q4. The sectors reporting the highest balances were motorways/trunk roads (38%), railways (35%) and preliminary works (28%). Railways and preliminary works have recorded strong balances for the last seven quarters since 2013 Q2. On balance, electricity (20%), water and sewerage (15%) and local roads (13%), and harbours and waterways (5%) also reported growth in Q4. The sectors that declined in Q4, on balance, were gas (-32%), communications (-24%) and airports (-1%).

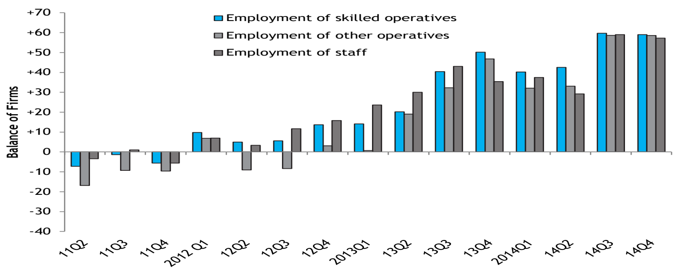
Expected Future Trends in the Next 12 Months



Expected workloads in Great Britain and England rose for the eighth consecutive quarter since Q1 2013. In Great Britain and England, 49% and 65% of firms respectively, reported that workloads are expected to increase over the next 12 months. In Scotland and Wales, these balances were 48% and 70%, respectively. On balance, 50% of British firms expect new work orders to grow in the next 12 months. By nation; England (55%), Scotland (51%) and in Wales (70%). For R&M orders, 26% of British firms, on balance, expect an increase during the next 12 months. This figure is 15% for Welsh, 10% for Scottish and 37% for English firms which broadly remained the same as Q3.

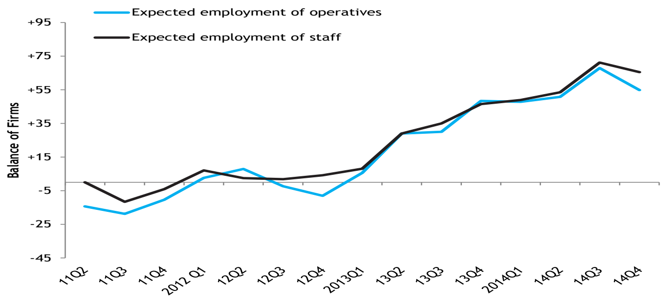
Trends in Employment

Employment Compared to 12 months Ago (GB)



Firms continued to increase employment in Q4. In Britain, on balance, employment of skilled operatives and other operatives increased according to 59%. For staff, on balance, in Q4, 57% of firms increased employment. For English firms, employment increased, on balance, according to 58% of firms for skilled operatives, 59% for other operatives and 52% for staff. In Wales, a balance of 40% was reported for skilled operatives, 50% for other operatives and 60% for staff. In Scotland, on balance, increases were reported by 43% of firms for skilled operatives, 37% for other operatives and 42% for staff.

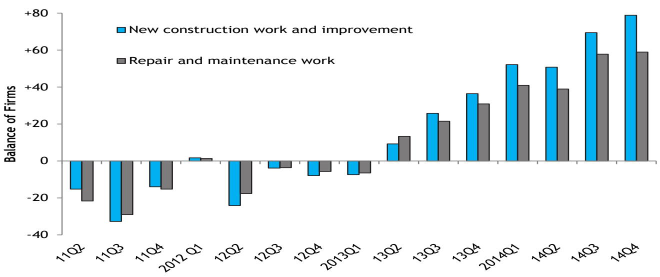
Expected Employment in the Next 12 Months



On balance, 55% of firms in Great Britain expect the employment of operatives to increase and 66% expect the employment of staff to increase in the next 12 months. In England, on balance, around half of respondents expect employment of operatives (54%), and employment of staff (68%), to rise. For the second consecutive quarter, prospects were optimistic in Wales in Q4. On balance, operatives and staff employment is expected to increase according to 75% of respondents. In Scotland, on balance, 44% of respondents expect employment to increase for operatives and 56% for staff.

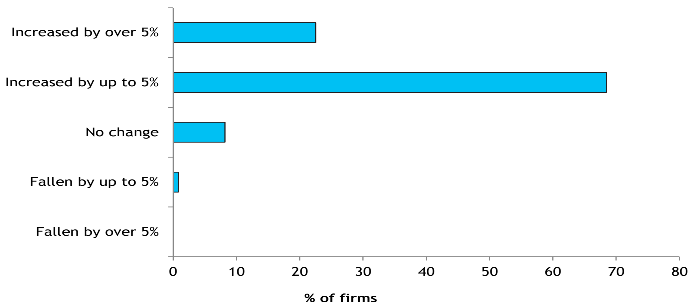
Trends in Costs, Tender Prices and Supply Constraints

Tender Prices Compared to 12 Months Ago (GB)



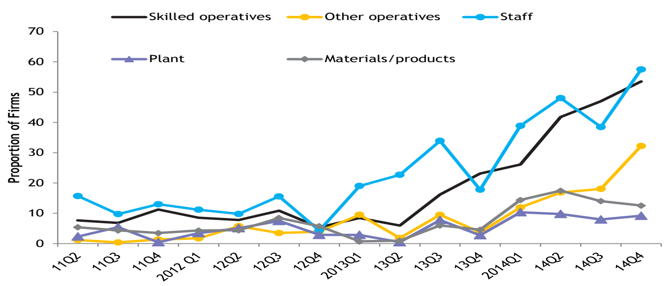
Compared to 12 months ago, tender prices for new construction work and improvement were higher, on balance, for 79% of firms, and 59% of firms for repair and maintenance work. In England, 86% of firms, on balance, reported higher tender prices for new construction work and improvement and 81% for repair and maintenance. In Wales, 80% of firms, on balance, reported an increase in tender prices for new construction and improvement and half of firms for repair and maintenance. In Scotland, on balance, 59% of respondents reported an increase in new construction work and improvement and 38% in repair and maintenance.

Costs Compared with 12 Months Ago (GB)



68% of firms in Great Britain reported in Q4 that costs increased by up to 5% compared to 12 months earlier and 23% reported increases of over 5%. Overall, on balance, 90% of firms reported an increase in costs. In England, 95% of firms, on balance, reported an increase in costs. 33% reported rises by over 5%, 63% by up to 5% and only 2% reported no change. In Scotland, costs increased, on balance, according to 78% of firms, and 75% of firms reported cost increases up to 5%. In Wales, 90% of firms, on balance, reported an increase in costs over the last 12 months. 10% of firms reported no change and 85% reported increases up to 5%.

Contractors Unsatisfied with Supply (GB)



Overall, the supply of suitable workers worsened compared to the first three quarters of 2014 for civil engineering firms in Great Britain. 54% and 32% of respondents reported dissatisfactory supply of skilled operatives and other operatives, respectively. The percentage reporting dissatisfaction in supply of staff increased to 58% in Q4 compared to 38% last quarter. 9% of firms reported dissatisfaction with plant and 13% reported dissatisfaction with materials/products. The most commonly reported dissatisfaction was supply of skilled operatives in England (54%) and Scotland (62%). In Wales, 35% of firms reported dissatisfaction with supply of staff.

Workload Trends Survey

1 Workload

	2010 Q4	2011 Q1	Q2	Q3	Q4	2012 Q1	Q2	Q3	Q4	2013Q1	Q2	Q3	Q4	2014Q1	Q2	Q3	Q4
Compared with 12 Months Ago																	
By Country																	
GB	-20	-27	-9	-22	+5	+1	-20	-17	0	+1	-2	+44	+31	+39	+48	+60	+52
England	-18	-32	-12	-9	+8	+6	-18	-39	-5	0	+2	+51	+18	+42	+59	+68	+57
Scotland	-32	-3	+6	-32	+20	+31	-37	+33	+39	+35	-21	+56	+29	+50	+11	+21	+27
Wales	-24	-29	-24	-25	-46	-29	0	-62	+8	-52	+11	-22	-5	0	+79	+71	+12
By Size of Firm																	
<115	-23	-38	-11	-12	-10	-18	-28	-8	+8	-10	+6	+41	+47	+13	+21	+29	+37
115-299	-29	-10	0	0	-14	+8	+5	+27	-22	+13	0	+64	+18	+75	+38	+17	+45
300-599	0	0	0	-29	-33	+33	0	0	-20	+60	-50	0	+38	+33	+67	+100	+83
600+	-16	-35	-13	-35	+49	0	-33	-51	+7	-7	+8	+53	+27	+39	+55	+77	+52
By Type of Work																	
Motorways & trunk roads	-73	-61	-54	-58	-37	-43	-53	-37	-33	-34	-6	+7	+13	+21	+26	+52	+23
Local roads	-29	-37	-43	-30	-41	-30	-42	-50	-30	-27	-32	+2	-6	-9	+9	+35	+2
Railways	-2	+24	+8	+15	+41	+32	+52	+21	+53	+28	+69	+54	+51	+45	+43	+48	-4
Airports	-26	-23	-15	-14	-1	-23	-5	+2	-17	-1	+18	+4	-2	-16	+13	-45	+6
Harbours, waterways etc.	-30	-19	-27	-11	-10	-3	+11	-15	-7	-5	+14	-4	+13	+3	+21	+16	-8
Water & sewerage	-15	+23	+14	+23	+12	+8	+23	+27	+1	+20	+24	+23	+20	+2	+5	+11	+8
Electricity	+35	+17	+61	+20	-4	+41	+28	+19	+8	+10	+16	+24	+6	+20	+17	+20	+57
Gas	-24	-20	-22	-28	-18	+14	-2	+24	+1	-25	+2	-2	+2	-26	+21	+9	-22
Communications	-7	-28	-63	-41	-35	-23	+1	-13	-34	-35	-4	-2	+22	0	+14	+20	-15
Preliminary works, etc.	-23	-8	-17	-13	-15	+3	-7	-10	-12	-8	+15	+30	+40	+48	+36	+45	+45

Weighted % Balance of Respondents

2 Expected Workload

	Q4	2011 Q1	Q2	Q3	Q4	2012 Q1	Q2	Q3	Q4	2013Q1	Q2	Q3	Q4	2014Q1	Q2	Q3	Q4
In the Next 12 Months																	
By Country																	
GB	-10	-7	-1	-24	+7	+10	+15	+2	-3	+1	+39	+40	+58	+58	+58	+72	+49
England	-10	-9	+9	-25	+9	+16	+27	+10	+4	+22	+55	+68	+61	+63	+73	+73	+65
Scotland	+5	+5	-13	+19	+8	-6	0	+8	-12	-5	+21	+14	+47	+50	+52	+54	+48
Wales	-25	-23	-9	-35	-47	+8	-18	-52	-22	-66	+3	+4	+10	+22	-4	+86	+70
By Size of Firm																	
<115	-27	-18	+11	-16	-7	+5	-10	-9	-8	-6	+11	+38	+56	+33	+43	+56	+40
115-299	+7	+8	-8	-4	+5	0	+4	+19	+14	+22	+42	+75	+55	+44	+69	+41	+64
300-599	0	0	-14	-13	-13	+11	+21	+11	-10	-14	+29	-10	+38	+63	+100	+100	+63
600+	-11	-12	-1	-39	+24	+17	+30	0	-3	0	+52	+45	+66	+68	+52	+84	+41

Weighted % Balance of Respondents

3 Order Books

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

Weighted % Balance of Respondents

4 Expected Trends in New Orders

	Q4	2011 Q1	Q2	Q3	Q4	2012 Q1	Q2	Q3	Q4	2013Q1	Q2	Q3	Q4	2014Q1	Q2	Q3	Q4
In the Next 12 Months																	
New Work																	
By Country																	
GB	-25	-6	-8	-27	-5	+8	-2	+8	-1	+12	+24	+50	+46	+58	+40	+69	+50
England	-26	-3	-6	-32	-5	+15	+7	+26	+17	+39	+45	+64	+44	+63	+48	+72	+55
Scotland	+10	-3	-9	+31	+15	-9	-12	+2	-17	+7	-2	+16	+41	+38	+30	+48	+51
Wales	-52	-29	-9	-39	-58	+4	-9	-39	-11	-69	-33	+31	+10	+22	0	+86	+70
By Size of Firm																	
<115	-31	-15	+2	-23	0	+11	-22	-9	-14	-8	+9	+30	+48	+33	+37	+43	+28
115-299	0	-5	-8	+7	-22	-13	+8	+6	+9	+26	+26	+75	+45	+50	+56	+41	+68
300-599	0	+25	0	-13	-13	+11	+7	+22	-10	+14	+14	0	+50	+43	+100	+100	+75
600+	-40	-7	-15	-48	+3	+17	0	+13	+8	+15	+31	+66	+44	+71	+26	+82	+41
R&M																	
By Country																	
GB	-13	+4	+6	-11	+10	+6	+21	+0	-7	+13	+25	+29	+39	+39	+11	+39	+26
England	-11	+1	+22	+1	+17	+22	+38	+22	+11	+24	+43	+40	+49	+51	+25	+37	+37
Scotland	-27	+17	+19	+11	-13	-19	+7	-15	-41	+10	+5	+4	+4	+31	+2	+38	+10
Wales	-25	-5	-14	-39	-23	-21	-31	-61	-36	-77	-26	+7	-18	-11	-33	+54	+15
By Size of Firm																	
<115	-25	+3	+4	-19	+2	+2	-14	-22	-17	-16	-4	+31	+37	+10	+20	+37	+10
115-299	0	0	-8	-13	-10	-14	-5	+20	-14	+9	+6	+42	+45	+18	+40	+44	+33
300-599	0	0	0	-25	-29	-11	+14	-11	-29	-17	+14	-22	+33	+38	+43	+67	0
600+	-15	+7	+16	-3	+37	+24	+56	+13	+8	+33	+51	+42	+38	+53	-3	+33	+38

Weighted % Balance of Respondents

5 Employment

	Q4	2011 Q1	Q2	Q3	Q4	2012 Q1	Q2	Q3	Q4	2013Q1	Q2	Q3	Q4	2014Q1	Q2	Q3	Q4
Compared with 12 Months Ago																	
By Country																	
Skilled operatives																	
GB	-27	-13	-7	-1	-6	+10	+5	+6	+14	+14	+20	+40	+50	+40	+43	+60	+59
England	-23	-16	-14	-1	-7	0	+1	0	+9	+7	+35	+65	+42	+43	+55	+76	+58
Scotland	-42	-5	+6	+7	-4	+8	-14	+24	+23	+41	+7	+36	+42	+58	+26	+24	+43
Wales	-42	-11	-13	+5	-21	+4	+41	-29	+39	-3	+17	-31	+22	0	+4	+52	+40
Other operatives																	
GB	-29	-21	-17	-9	-10	+7	-9	-8	+3	+1	+19	+32	+47	+32	+33	+59	+59
England	-25	-26	-22	-8	-6	-1	-22	-18	-3	-4	+29	+48	+29	+35	+39	+70	+59
Scotland	-52	-7	-19	-5	-46	0	-14	+8	+16	+19	+23	+37	+63	+39	+17	+24	+37
Wales	-44	-11	-29	-9	-32	+4	+25	-35	+28	-7	+17	-33	+4	0	+4	+66	+50
Staff																	
GB	-21	-24	-3	+1	-6	+7	+3	+12	+16	+24	+30	+43	+35	+37	+29	+59	+57
England	-19	-18	-6	-4	-6	-1	-5	+3	+5	+20	+44	+67	+37	+42	+40	+78	+52
Scotland	-40	-51	0	+36	0	0	-7	+34	+18	+35	+17	+46	+17	+56	+10	+8	+42
Wales	-29	-6	-4	+4	-53	-26	+18	-19	+33	+7	+20	-33	+26	+22	-15	+66	+60
By Size of Firm																	
Skilled operatives																	
<115	-23	-20	0	-6	-5	-2	-16	-14	+13	-4	-4	+26	+44	+25	+18	+30	+18
115-299	-35	-5	-16	+15	-22	+4	+12	+18	+17	+18	+30	+60	+41	+44	+56	+33	+61
300-599	-25	-50	+14	0	-13	+33	+7	0	+20	+29	-25	+30	+13	+56	+75	+43	+56
600+	-24	-9	-12	-6	+4	+10	+12	+16	+11	+19	+41	+44	+65	+40	+40	+81	+78
Other operatives																	
<115	-25	-13	-9	-10	-10	-9	-21	-14	+3	-13	0	+19	+36	+19	+36	+30	+25
115-299	-43	-22	-40	-4	-18	-4	+8	+6	0	+14	+37	+48	+20	+56	+56	+33	+54
300-599	-25	-50	-14	-11	-38	+22	0	+11	+10	+29	-13	+20	+25	+38	+75	+57	+56
600+	-24	-21	-12	-11	+4	+15	-14	-20	+2	-3	+30	+36	+65	+30	+18	+76	+78
Staff																	
<115	-4	-13	0	0	-12	-9	-6	-5	+1	+8	+7	+14	+28	+21	+14	+32	+32
115-299	-32	-13	-24	+7	-4	-9	+28	+18	+30	+18	+35	+57	+41	+39	+56	+33	+50
300-599	-25	-75	0	0	-13	+22	-7	+22	+30	+43	-13	+40	+13	+44	+63	+71	+44
600+	-24	-16	+2	-1	0	+17	+3	+16	+14	+28	+51	+51	+43	+40	+21	+74	+78

Weighted % Balance of Respondents

6 Expected Employment

	Q4	2011 Q1	Q2	Q3	Q4	2012 Q1	Q2	Q3	Q4	2013Q1	Q2	Q3	Q4	2014Q1	Q2	Q3	Q4
In the Next 12 Months																	
By Country																	
Operative jobs																	
GB	-6	-11	-14	-19	-10	+3	+8	-2	-8	+6	+29	+30	+48	+48	+51	+68	+55
England	-2	-10	-12	-24	-18	+4	+16	+7	-1	+21	+53	+65	+53	+49	+58	+65	+54
Scotland	-5	0	-28	+10	+13	-6	-2	-6	-10	-6	+10	+18	+31	+45	+49	+63	+44
Wales	-38	-41	-18	-26	-47	+4	-27	-48	-28	-24	+3	-16	+5	+28	-4	+84	+75
Employment of staff																	
GB	+3	0	0	-12	-4	+7	+3	+2	+4	+8	+29	+35	+47	+49	+54	+71	+66
England	+7	0	+4	-22	-5	+12	+11	+9	+12	+23	+51	+63	+37	+62	+63	+70	+68
Scotland	0	0	+6	+21	+8	-9	-17	+6	-12	-4	+12	+16	+48	+34	+51	+66	+56
Wales	-21	-12	-9	-22	-47	0	-18	-42	-11	-17	0	-11	+5	+17	-4	+84	+75
By Size of Firm																	
Operative jobs																	
<115	-21	-28	+7	-11	-3	-7	-7	-13	-8	0	+2	+33	+46	+29	+41	+34	+36
115-299	-4	0	-29	0	-5	+4	0	+6	+9	+13	+37	+60	+55	+50	+63	+56	+64
300-599	0	+25	-29	-25	-25	+11	+7	0	-30	-29	+14	0	+38	+63	+86	+100	+50
600+	0	-16	-15	-28	-13	+4	+20	0	-7	+13	+42	+29	+50	+50	+45	+76	+59
Employment of staff																	
<115	-7	-15	+11	-7	-7	-2	-7	-7	-3	+1	+15	+27	+41	+25	+27	+29	+40
115-299	+4	+13	-17	+4	0	+4	+8	+13	+14	+9	+32	+65	+59	+33	+56	+63	+71
300-599	0	+25	-29	-13	-25	+11	-7	+11	-10	0	0	+10	+38	+63	+100	+100	+75
600+	+10	-5	+8	-20	+3	+12	+10	0	+11	+13	+42	+37	+47	+57	+52	+81	+70

Weighted % Balance of Respondents

7 Costs

	Q4	2011 Q1	Q2	Q3*	Q4	2012 Q1	Q2	Q3	Q4	2013Q1	Q2	Q3	Q4	2014Q1	Q2	Q3	Q4
Compared with 12 Months Ago (%)																	
GB																	
Falling	+4	+6	+5	+3	+0	0	+1	+0	+4	+8	0	+1	0	0	0	0	0
Unchanged	+19	+18	+12	+15	+1	+4	+11	+3	+1	+0	+6	+5	+3	0	0	+5	+1
Slower	+29	+9	+13	+26	+27	+22	+23	+22	+23	+20	+23	+18	+25	+10	+15	+19	+8
Same rate	+31	+25	+33	+45	+62	+64	+55	+69	+61	+61	+66	+72	+62	+75	+77	+61	+68
Faster	+18	+42	+37	+12	+10	+10	+10	+6	+11	+10	+5	+4	+9	+15	+9	+15	+23
Cost Balances																	
By Country																	
GB	+74	+70	+78	+40	+70	+70	+54	+71	+67	+63	+64	+71	+68	+90	+85	+71	+90
England	+80	+70	+72	+42	+72	+73	+48	+77	+68	+62	+70	+75	+65	+90	+88	+78	+95
Scotland	+9	+67	+88	+49	+54	+58	+53	+70	+57	+81	+62	+76	+42	+86	+77	+74	+78
Wales	+92	+76	+96	+70	+63	+72	+50	+87	+78	+10	+10	+38	+96	+83	+96	+80	+90
By Size of Firm																	
<115	+91	+79	+91	+69	+79	+75	+66	+68	+78	+82	+74	+71	+82	+79	+86	+84	+77
115-299	+61	+77	+76	+63	+65	+57	+44	+47	+70	+82	+74	+81	+70	+83	+94	+81	+82
300-599	+50	+75	+100	+50	+50	+89	+67	+67	+70	+86	+57	+80	+75	+63	+75	+83	+89
600+	+76	+67	+69	+13	+73	+67	+46	+84	+59	+44	+58	+66	+60	+100	+86	+62	+100

* 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	Q4	2011 Q1	Q2	Q3	Q4	2012 Q1	Q2	Q3	Q4	2013Q1	Q2	Q3	Q4	2014Q1	Q2	Q3	Q4
Compared with 12 Months Ago																	
New work																	
By Country																	
GB	-45	-21	-15	-33	-14	+2	-24	-4	-8	-7	+9	+26	+36	+52	+51	+69	+79
England	-42	-17	-30	-35	-14	-7	-29	-4	-11	-12	+24	+21	+23	+56	+40	+69	+86
Scotland	+62	-23	+6	-21	-38	-23	-29	-28	-5	+2	+7	+10	+40	+13	+39	+42	+59
Wales	-56	-35	-29	-52	-53	+4	-73	+20	-61	-86	-63	+4	+5	+53	+73	+86	+80
By Size of Firm																	
<115	-47	-11	-9	-21	-3	-13	-23	-25	-9	-1	+23	+29	+29	+24	+45	+35	+53
115-299	-42	-18	-8	-26	-23	0	-38	-25	+18	+13	0	+37	+36	+56	+69	+56	+79
300-599	-50	-50	+29	-38	-63	+11	+13	-33	-40	-14	-29	-20	+13	+29	+57	+100	+63
600+	-45	-7	-29	-40	0	+7	-37	+29	-6	-15	+17	+34	+46	+64	+47	+79	+94
R&M																	
By Country																	
GB	-38	-11	-22	-29	-15	+1	-18	-4	-6	-6	+13	+22	+31	+41	+39	+58	+59
England	-34	-5	-30	-22	-17	-13	-25	0	-12	-19	+23	+11	+20	+46	+29	+50	+81
Scotland	-74	-28	-7	-54	-36	-16	-21	-24	-5	+13	+8	+2	+23	+28	+36	+34	+38
Wales	-42	-29	-13	-43	-46	+24	-44	-16	-38	-62	-58	+14	+10	+53	+62	+81	+50
By Size of Firm																	
<115	-43	-19	-7	-13	0	-12	-16	-9	-8	-3	+18	+16	+24	+17	+27	+26	+45
115-299	-42	-18	-19	-30	-26	-5	-30	-14	+14	0	-13	+30	+41	+60	+60	+38	+54
300-599	-33	0	0	-38	-57	+25	+21	-33	-29	0	-33	0	+13	+43	+50	+83	+57
600+	-33	+7	-34	-34	-8	+3	-31	+18	-6	-11	+33	+28	+35	+44	+36	+71	+67

Weighted % Balance of Respondents

9 Supply of Resources Required	Q4	2011 Q1	Q2	Q3	Q4	2012 Q1	Q2	Q3	Q4	2013Q1	Q2	Q3	Q4	2014Q1	Q2	Q3	Q4
Skilled Operatives																	
GB	3	4	8	7	11	9	8	11	5	8	6	16	23	26	42	47	54
England	2	5	10	5	15	8	11	6	5	6	3	3	16	23	47	47	54
Scotland	0	3	13	18	0	13	5	10	14	17	12	40	43	35	33	46	62
Wales	8	0	4	0	0	12	9	35	0	0	0	31	19	33	11	32	25
Other Operatives																	
GB	1	0	1	0	1	2	6	3	4	10	2	9	4	12	17	18	32
England	1	1	1	0	0	0	10	3	7	10	2	5	6	18	27	11	30
Scotland	0	0	0	0	0	10	0	6	0	12	5	10	5	10	16	21	32
Wales	0	0	0	0	0	0	0	0	0	14	0	20	0	0	0	30	0
Staff																	
GB	17	14	16	10	13	11	10	16	4	19	23	34	18	39	48	38	58
England	20	19	10	5	19	14	15	13	4	13	24	23	11	39	53	26	51
Scotland	0	0	34	41	0	3	5	0	2	28	3	32	26	40	40	33	61
Wales	8	0	0	0	0	12	0	35	11	0	7	44	19	33	41	64	35
Plant																	
GB	1	1	2	5	0	3	5	7	3	3	0	8	3	10	10	8	9
England	0	1	1	8	1	0	6	12	2	0	1	3	1	9	12	6	15
Scotland	0	0	13	0	0	5	0	2	2	10	0	14	3	3	12	4	5
Wales	4	0	0	0	0	0	0	0	22	0	0	20	19	0	0	0	10
Materials and Products																	
GB	2	1	5	4	3	4	4	8	6	1	1	6	5	14	17	14	13
England	1	1	6	7	5	2	7	13	11	1	1	2	5	16	17	22	23
Scotland	0	3	16	0	0	3	2	8	0	1	3	6	3	3	14	2	5
Wales	4	0	4	0	0	0	0	0	0	0	0	20	0	0	0	0	5

% 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 Q4 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.

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