economic & construction MARKET REVIEW

Barbour ABI · Building · bd

NOVEMBER 2014

Economic Context
Major announcements and developments in the UK economy this month.
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The Construction Sector
The main economic headlines in the construction industry this month.
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Sectors in Detail
A closer look at changes in the major sectors within the industry this month.
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ABOUT US
SPECIALIST PROVIDER OF CONSTRUCTION INTELLIGENCE

Barbour ABI

Barbour ABI is a leading provider of construction intelligence services. With a team of in-house research specialists and a dedicated lead economist, it provides commercially relevant insight and unique analysis of trends and developments within the building and construction industry. Barbour ABI is the chosen provider of industry data and indicators for Government bodies including the Office for National Statistics and the UK Government's Construction and Infrastructure Pipeline, which outlines future construction and infrastructure projects where public funding is agreed. Barbour ABI also provides data for independent organisations, such as the Construction Products Association.

Barbour ABI is part of global events-led marketing services and communications company, UBM.

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Michael is Barbour ABI's Lead Economist specialising in construction and the built environment. He leads on Barbour ABI's research and outputs on the construction sector assessing the trends and developments which impact upon it. Prior to this Michael worked for GVA Grimley as a Principal Economist focussing on the commercial property sector.

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Provider of the Government's Construction and Infrastructure Pipeline

HM Government

Chosen provider of Construction New Orders estimates to the ONS and communal dwellings data

Office for National Statistics

construction products association

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ECONOMIC CONTEXT

UK ECONOMY GROWS 0.7% IN THE THIRD QUARTER

The UK economy grew by 0.7% in Q3 2014, continuing the pattern of growth from the first half of the year (see Fig. 1.1).

Output increased in all four main sectors with services growing 0.7%, production 0.5%, construction 0.8% and agriculture 0.3%.

When analysing growth in each of the main industrial groupings it is notable that the service sector is the only one which is above its pre-recession levels of activity with output 7.2% above the Q1 2008 level (see Fig. 1.2). In contrast, construction is 8.2% below its 2008 level; manufacturing is 4.1% below and production 9.7% lower.

With GDP continuing to grow, other macroeconomic indicators also continue to point to an improvement in the UK economy. The labour market maintained its recent strong performance as unemployment fell once again in the three months to September and now stands at 6%, which is the lowest rate since 2008.

There was also an improvement in real wage growth which has been performing particularly poorly over recent years (see Fig. 1.3). For the first time since September 2009, regular pay growth exceeded inflation with annual wage growth 1.3% compared to inflation levels of 1.2%. The Bank of England are confident that wages will continue to rise above inflation so these indices will be closely scrutinised in the coming months to assess whether this is the case.

Other news this month on the UK economy includes:

- **The latest Bank of England Inflation Report presented a weak view of inflation lessening the likelihood of interest rate rises in the near future**
- **A survey from data company Nielsen showed that consumer sentiment was at a seven year high**
- **The Markit/CIPS Services PMI indicator dipped to 56.2 in October down from 58.7 in September**

While the headline economic indicators continue to point to a strong outlook, there is increasing evidence of a slowdown in the Eurozone with the normally resilient German economy evidencing slowing growth. There was some evidence of a slowdown in the UK housing market but forward sales for major house builders remain strong. While output is growing and unemployment falling there are still a number of fundamentals that pose longer term problems for the economy, particularly lower productivity and slow wage growth, which although above inflation this month will provide a drag on performance unless the rate of growth increases considerably.

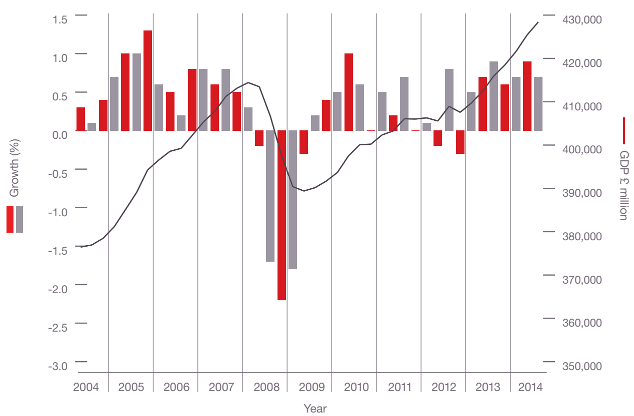

Fig. 1.1 UK GDP Source: ONS

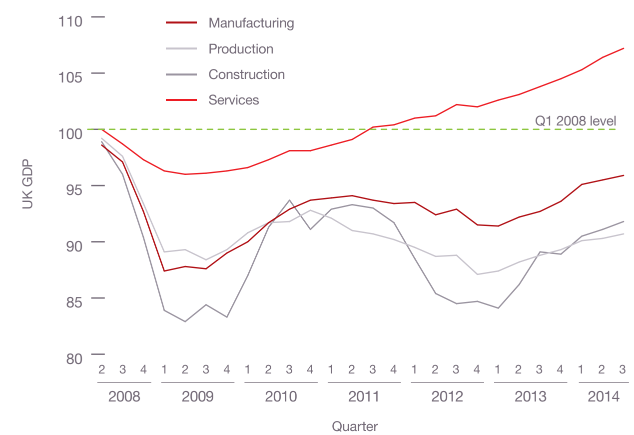

Fig. 1.2 UK GDP Source: ONS

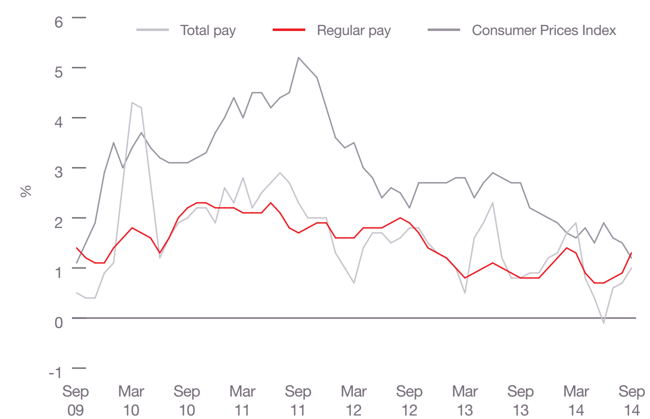

Fig. 1.3 Real Wage Growth Source: ONS

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THE CONSTRUCTION SECTOR

CONTRACT AWARD VALUES TOTAL £6 BILLION IN OCTOBER

The latest figures from the ONS show that output in the construction sector in the UK increased by 0.8% between Q2 and Q3 2014.

Comparing output levels with Q3 2013 showed an increase of 0.3%. This is confirmation of the longer term growth in activity within the sector.

It is clear that the housing sector is the main component of growth within the industry over the longer term (see Fig. 2.1). Comparing this quarter with the same quarter of 2013 Private New Housing increased by 18.9% and Public New Housing increased by 35.2%. Over the same period output the Private Commercial sector decreased by 6.7% and Infrastructure decreased by 5.5%. This highlights that the growth patterns within the industry are reliant on housing and broader improvements are needed to ensure a robust recovery.

	% change	
	Quarter 3 2013 – Quarter 3 2014	**Quarter 2 2014 – Quarter 3 2014**
Total All Work	**2.9**	**0.8**
All New Work	**3.7**	**1.0**
Public Housing	35.2	5.7
Private Housing	18.9	4.9
Infrastructure	-5.5	1.2
Public (ex Infrastructure)	-7.4	-1.2
Private Industrial	21.7	1.7
Private Commercial	-6.7	-3.1
Repair & Maintenance	**1.6**	**0.4**
Public Housing	-1.9	-1.6
Private Housing	0.8	-1.0
Non-Housing	3.2	1.9

Fig. 2.1 **Construction Activity by Sector** *(chained volume measure)* Source: ONS

The CPA/Barbour ABI Index

The CPA/Barbour ABI Index which measures the level of contracts awarded using January 2010 as its base month recorded a reading of 136 for October (see Fig. 2.2). This is a slight increase from last month and continues to support the view that overall activity in the industry remains strong. The readings for Commercial Offices and Commercial Retail were up this month. However, Private Housing fell this month to 229, down from a high of 246 in September.

Construction Sector

According to Barbour ABI data on all contract activity, October witnessed an increase in construction levels with the value of new contracts awarded at £6 billion, based on a three month rolling average (see Fig. 2.4). This is a 5.9% increase from September and a 6.1% increase on the value recorded in October 2013, an indication of continuing growth in the fourth quarter. The number of construction projects within the UK in October increased by 5% on September, and is 1.9% higher than October 2013.

The majority of the contracts awarded in October by value were in London, accounting for 29% of the UK total (see Fig. 2.3). This is followed by the South East with 14% of contracts awarded. The main reason for London's dominance was the £600 million Northern Line Extension contract which was awarded to the Ferrovial/Laing O'Rourke consortium. The contract to redevelop Number 1 Court at the All England Lawn Tennis Club in Wimbledon was also awarded in October, at a value of £150 million. There was also a major residential project awarded at Kidbrooke Village in South East London which is valued at £100 million and set to deliver over 1,000 residential units. In the South East a major

> October witnessed an increase in construction levels

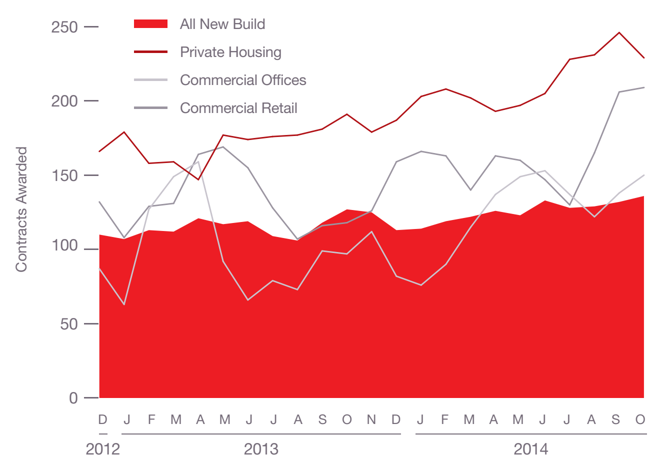

Fig. 2.2 **Contracts Awarded** Source: CPA/Barbour ABI

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retail scheme named Watermark West Quay in Southampton was awarded this month at a value of £70 million. In addition a contract to deliver a nursing home and care housing development in Hampshire, valued at £45 million contributes to the strong performance of the South East. Other contracts of note in October are the £315 million Circuit of Wales project to provide a world class motor sport destination in Ebbw Valley in Gwent and the New Papworth Hospital, a 310 bed facility in Cambridge at a value of £150 million.

> Continuing strength of the residential sector within construction

Type of Projects

Residential had the highest proportion of contracts awarded by value in October with 30% of the total (see Fig. 2.5). The infrastructure sector also featured prominently this month accounting for 22% of the total value of all projects and commercial & retail accounted for 16%. This is an indication of the continuing strength of the residential sector within construction, although it is notable that the infrastructure sector has a significant proportion of contracts this month after its recent sluggish performance.

> The majority of the contracts awarded in October by value were in London

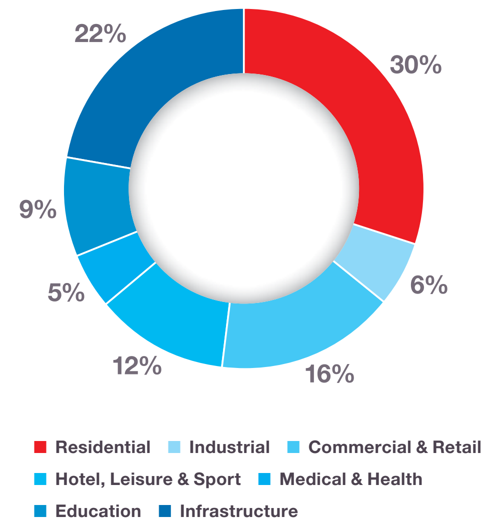

Fig. 2.5 **Type of Projects** Source: Barbour ABI

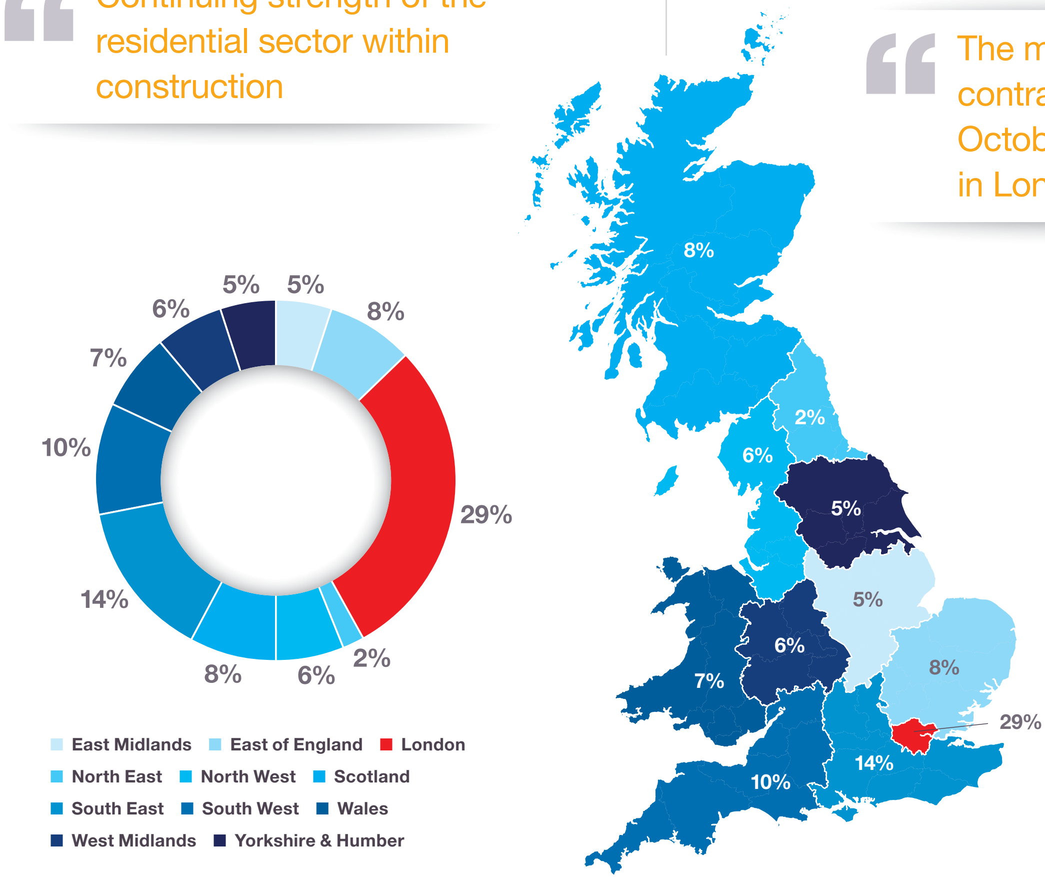

Fig. 2.3 **Locations of Contracts Awarded** Source: Barbour ABI

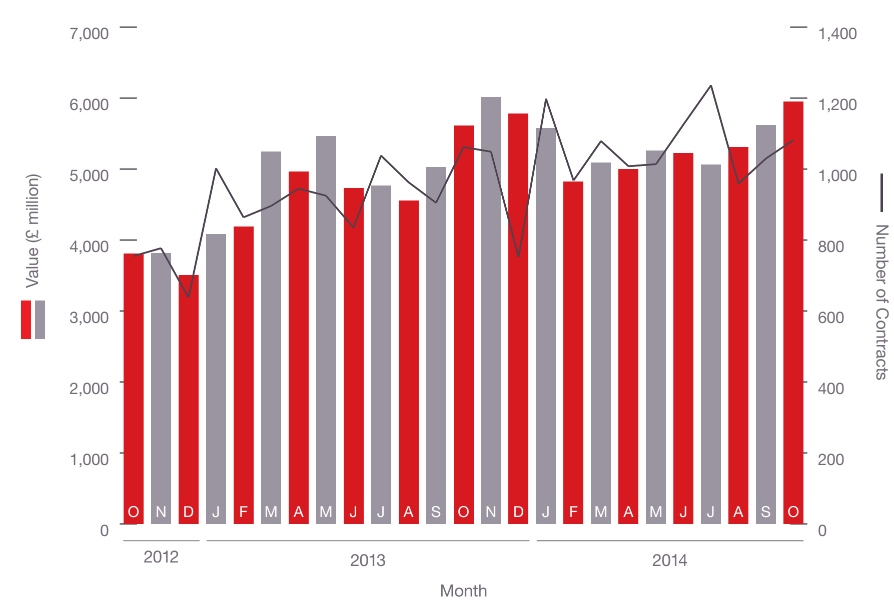

Fig. 2.4 **Construction Activity Trends** Source: Barbour ABI

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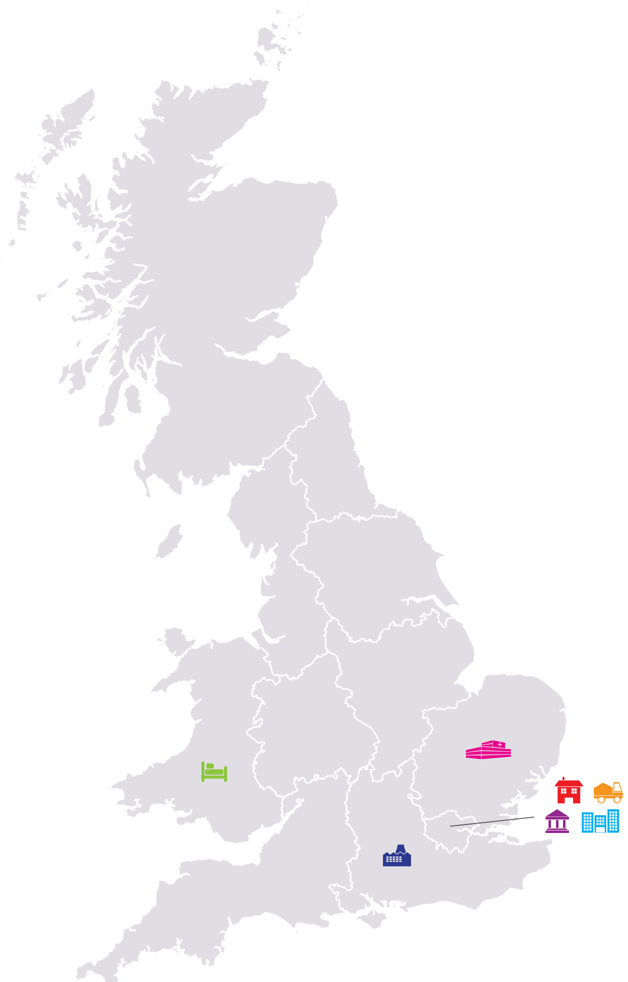
A snippet of this month's regional activity

Take a look at what regions have had the most activity.



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PROJECTS IN FOCUS THIS MONTH

Take a look at these construction projects in focus this month.
Click on one of the projects below to skip to that page.

RESIDENTIAL
Kidbrooke Village – Phase 5
£100,000,000

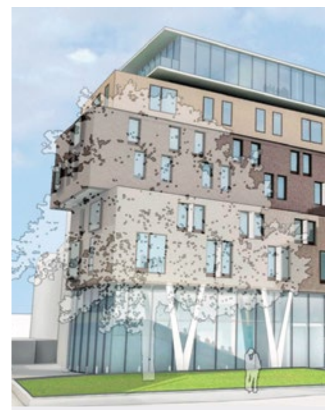
INFRASTRUCTURE
Bolton Bus Station Interchange
£48,000,000

COMMERCIAL & RETAIL
Watermark West Quay – Phase 1
£70,000,000

HOTEL, LEISURE & SPORT
Rassau Industrial Estate – Circuit of Wales
£315,000,000

INDUSTRIAL
University Of Liverpool – Materials Innovation Factory
£23,000,000

MEDICAL & HEALTH
Oak Park Health and Wellbeing Campus
£45,000,000



EDUCATION
Queen Mary University of London – New Graduate Centre
£36,000,000

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RESIDENTIAL

SIGNIFICANT INCREASE IN RESIDENTIAL UNITS AWARDED

The residential sector experienced an increase in residential units reaching contract award stage in October indicating continued growth.

Activity in the residential sector was higher in October with the total number of units awarded at 13,554, based on a three month rolling average (see Fig. 3.1). This is a 9.2% increase compared to September and is 34.2% higher than October 2013, indicating the longer term increase in the sector. The value of projects associated with residential contracts awarded decreased by 0.6% between September and October 2014, based on a three month rolling average, and was 6.2% lower than October 2013, suggesting that while the number of units are increasing the actual values of contracts are not. This is perhaps an indication of a wider spread of projects over recent months, as opposed to a concentration in London where values tend to be higher.

Sector Performance

The latest house price indices for October from Nationwide showed that average house prices are rising at 9.0% annually, a slight fall from 9.4% last month. The Halifax reported annual house price rises recorded at 8.8% in October, down from 9.4% in September.

The Land Registry also detected a fall in house price increases with growth down in seven out of ten regions in England and Wales. In particular, it noted that London experienced a month on month drop of 0.7% in September, the first monthly fall since October 2013. Figures from the Bank of England seem to support the view that the market is cooling with mortgage approvals falling to 61,627 in September compared to the average of 64,720 over the previous six months. In contrast Persimmon announced that all homes built in 2014 were sold and that reserved forward sales for 2015 and beyond were up by 12%, indicating continued momentum for future house building activity.

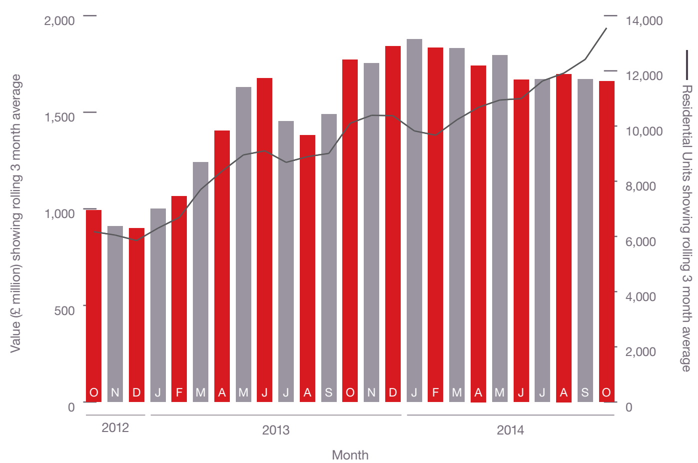

FIG. 3.1

Residential: **Project Value showing 3 month moving average** Source: Barbour ABI

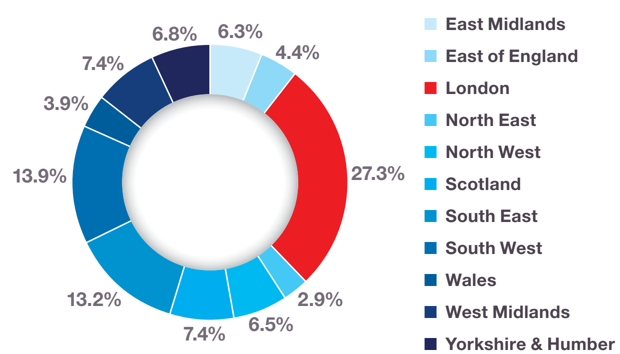

FIG. 3.2

Residential: **Value of Contracts by Region** Source: Barbour ABI

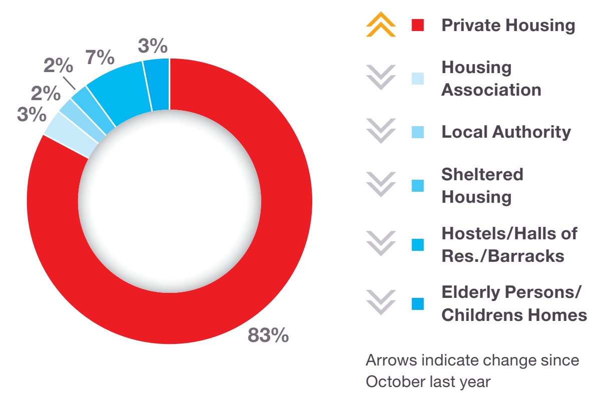

FIG. 3.3

Residential: **Type of Projects Awarded** Source: Barbour ABI

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The map and figures show how the activity has changed since October 2013			▲	+1.1%	Scotland
▲	+1.0%	East Midlands	▲	+5.5%	South East *HOTTEST REGION*
▼	-1.3%	East of England	▼	-3.7%	South West
▲	+3.9%	London	▲	+3.1%	Wales
▼	-0.9%	North East	▼	-1.8%	West Midlands
▼	-1.6%	North West	▼	-5.3%	Yorkshire & Humber

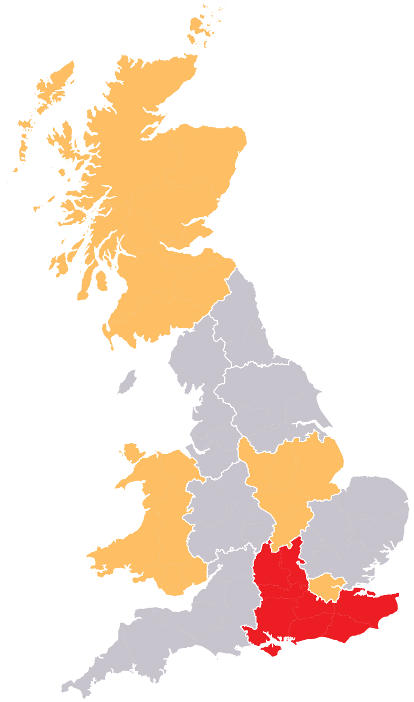

FIG. 3.4

Residential: **Change of Activity by Region** *(since last year)* Source: Barbour ABI

Projects by region

London is the main location of activity in the residential sector this month, accounting for 27.3% of the value of contracts awarded, an increase of 3.9% from the same month last year (see Fig. 3.2 & 3.4). London's prominence was primarily due to the award of a contract to develop over 1,000 homes at Kidbrooke Village in Greenwich at a value of £100 million. The South West and the South East were the other most popular locations for residential contracts accounting for 13.9% and 13.2% of contracts awarded respectively. Of particular note was the award of the contract to develop 376 homes in Cheltenham as part of the Leckhampton Lane development at a value of £100 million.

Type of Projects

The type of projects awarded in the residential sector was dominated by private housing this month (see Fig. 3.3). Private housing accounted for 83% of the value of contracts awarded, an increase of 14% from the corresponding month last year. After private housing, the next largest project type were hostel projects which accounted for 7% of the value awarded, a decrease of 5% from the corresponding month last year.

> A wider spread of projects over recent months

PROJECT IN FOCUS

Kidbrooke Village – Phase 5
£100,000,000

County	London
Primary Category Sector	Residential
Government Region	London
Start Date	April 2015
End Date	April 2019
Contract Award Date	October 2014
Funding	Private
Stage	Contract
Contractor	Berkeley Homes

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SIGNIFICANT INCREASE IN RESIDENTIAL UNITS AWARDED

TOP TEN Key Clients
Nov 2013 – Oct 2014

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	194	2,970
2	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	185	2,553
3	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	196	2,186
4	Berkeley Group Plc / St James Group	Berkeley House, 19 Portsmouth Road, Cobham, Surrey, KT11 1JG	01932 868 555	30	1,220
5	Bellway Plc	Seaton Burn House, Dudley Lane, Seaton Burn, Newcastle Upon Tyne, Tyne And Wear, NE13 6BE	0191 217 0717 (CTPS)	89	995
6	Redrow Homes (South Midlands) Limited	Redrow House, St David's Park, Deeside, Clwyd, CH5 3RX	01244 520 044	66	849
7	Ministry of Defence	Whitehall, Westminster, London, SW1A 2HB	020 7218 9000	19	688
8	The Peel Group	Peel Management, Peel Dome, The Trafford Centre, Manchester, Greater Manchester, M17 8PL	0161 629 8200	1	650
9	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	65	578
10	Bloor Homes	Ashby Road, Measham, Swadlincote, Derbyshire, DE12 7JP	01530 270100	51	544

TOP TEN Key Architects
Nov 2013 – Oct 2014

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	89	938
2	Foster & Partners	Riverside, 22 Hester Road, Battersea, London, SW11 4AN	020 7738 0455	4	772
3	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	39	741
4	5plus Architects	4th Floor The Hive, 47 Lever Street, Manchester, Greater Manchester, M1 1FN	0161 228 0211	1	650
5	AHR	Norwich Union House, High Street, Huddersfield, West Yorkshire, HD1 2LR	01484 537411 (TPS)	1	650
6	Scott Brownrigg Limited	St Catherines Court, 46-48 Portsmouth Road, Guildford, Surrey, GU2 4DU	01483 568686	10	629
7	Faulks Perry Culley & Rech	Lockington Hall, Lockington, Derby, Derbyshire, DE74 2RH	01509 672772	20	537
8	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	43	492
9	LDA Design	Worton Rectory Park, Oxford, Oxfordshire, OX29 4SX	01865 887 050 (TPS)	2	455
10	Alfford Hall Monaghan Morris	2nd Floor, Block C, Morelands, 5-23 Old Street, City, London, EC1V 9HL	020 7251 5261	6	430

TOP TEN Key Contractors
Nov 2013 – Oct 2014

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	188	2,784
2	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	199	2,573
3	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	195	2,134
4	Berkeley Group Plc / St James Group	Berkeley House, 19 Portsmouth Road, Cobham, Surrey, KT11 1JG	01932 868 555	26	1,163
5	Bellway Plc	Seaton Burn House, Dudley Lane, Seaton Burn, Newcastle Upon Tyne, Tyne And Wear, NE13 6BE	0191 217 0717 (CTPS)	93	1,029
6	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	90	846
7	Brookfield Multiplex Construction Europe Limited	99 Bishopsgate, 2nd Floor, City, London, EC2M 3XD	020 7659 3500	5	815
8	Redrow Homes (South Midlands) Limited	Redrow House, St David's Park, Deeside, Clwyd, CH5 3RX	01244 520 044	64	717
9	Keepmoat Regeneration Limited	The Waterfront, Lakeside Boulevard, Doncaster, South Yorkshire, DN4 5PL	01302 346620 (CTPS)	68	645
10	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	55	597

The ranking tables are compiled from Barbour ABI database and are based on the total value of contracts awarded over the previous 12 month period. The values represent the construction cost of each project.

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INFRASTRUCTURE CONTRACT VALUES INCREASE IN OCTOBER

The value of infrastructure contracts increased but there are still concerns over longer term growth as the value of orders is below those seen last year.

The value of contracts awarded in the infrastructure sector increased in October with the total value awarded £1.2 billion based on a three month rolling average (see Fig. 4.1). This is 8.3% higher than the previous month but 26.6% lower than October 2013. In the three months to October the total value of contract awards was £3.5 billion based on a three month rolling average. This is 4.1% higher than the previous three months but 22.6% lower than the same period in 2013. This indicates the continued challenges that the infrastructure sector faces with a longer term decline in the value of contract values, however a handful of large scale projects could alter this trend.

Projects by region

The main location of infrastructure projects this month was London with 44.7% of the total value, an increase of 33.1% from October 2013 (see Fig. 4.2 & 4.4). This is due to the award for the contract to deliver the Northern Line extension to Battersea which was awarded at a value of £600 million.

Type of Projects

The Northern Line extension contract means that transport is the major project type in infrastructure in October accounting for 60% of the total value of projects (see Fig. 4.3).

> In the three months to October the total value of contract awards was £3.5 billion based on a three month rolling average

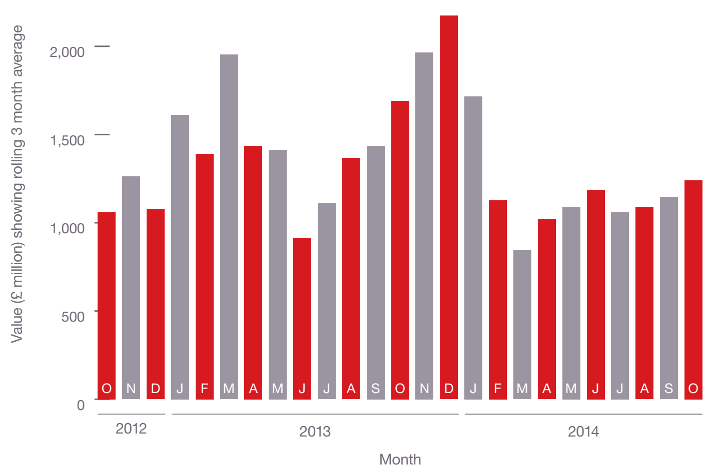

FIG. 4.1

Infrastructure: **Project Value showing 3 month moving average** Source: Barbour ABI

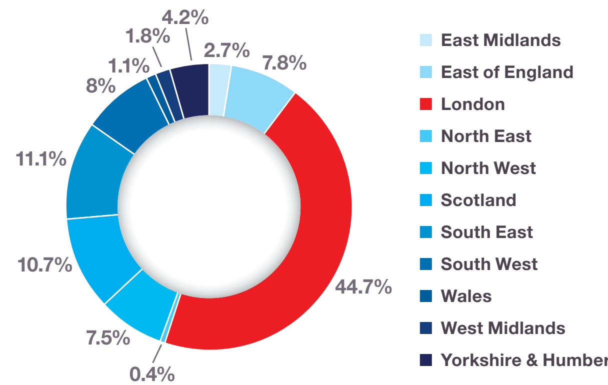

FIG. 4.2

Infrastructure: **Value of Contracts by Region** Source: Barbour ABI

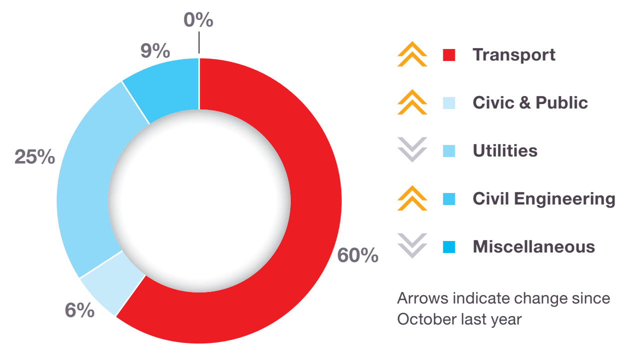

FIG. 4.3

Infrastructure: **Type of Projects Awarded** Source: Barbour ABI

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INFRASTRUCTURE CONTRACT VALUES INCREASE IN OCTOBER

The map and figures show how the activity has changed since October 2013

		-7.4%	Scotland
-9.4%	East Midlands	+9.3%	South East
-3.5%	East of England	+5.1%	South West
+33.1%	London *HOTTEST REGION*	-7.8%	Wales
-3.1%	North East	-18.1%	West Midlands
+1.1%	North West	+0.8%	Yorkshire & Humber

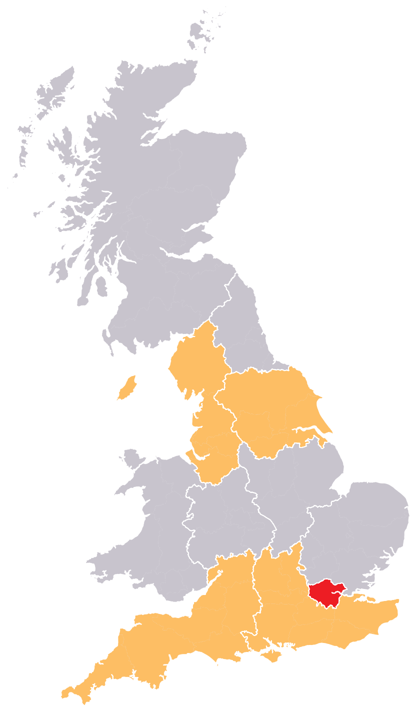

FIG. 4.4

Infrastructure: **Change of Activity by Region** *(since last year)* Source: Barbour ABI

Outlook

This month a report by the Centre for Economics and Business Research (CEBR) and Pinsent Masons predicted that China would invest £105 billion in UK infrastructure by 2025 in what is described as a "game changer" for the sector. In addition, David Cameron announced the intention to spend £15 billion on road schemes by 2020, which could account for over 100 projects. With the Autumn Statement due on 3rd December there is already speculation on the projects that are due to be announced as part of it. The northern parts of the country are expected to be earmarked for a number of large scale infrastructure projects over the course of the next Parliament.

PROJECT IN FOCUS

Bolton Bus Station Interchange
£48,000,000

County	Greater Manchester
Primary Category Sector	Infrastructure
Government Region	North West
On Site	November 2013
End Date	November 2015
Contract Award Date	October 2014
Funding	Public
Stage	Subcontract
Contractor	Kier Northern

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INFRASTRUCTURE CONTRACT VALUES INCREASE IN OCTOBER

TOP TEN Key Clients
Nov 2013 – Oct 2014

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Mainstream Renewable Power	3rd Floor, 2West Regent Street, Glasgow, Strathclyde, G2 1RW	0141 206 3860	1	1,400
2	Highways Agency	123 Buckingham Palace Road, Westminster, London, SW1W 9HA	0845 955 6575	31	748
3	Halton Borough Council	Municipal Building, Kingsway, Widnes, Cheshire, WA8 7QF	0151 424 2061	4	665
4	Battersea Power Station Development Company	Battersea Power Station, 188 Kirtling Street, South Lambeth, London, SW8 5BN	020 7501 0688 (CTPS)	1	600
5	Intergen Limited	81 George Street, Edinburgh, Lothian, EH2 3ES	0131 624 7500	1	600
6	Gateway Energy Centre Limited	Manorway, Stanford Le Hope, Essex, SS17 9PD	0800 169 5290	1	600
7	Mersey Gateway Project Office	First Floor, Unit 15, Turnstone Business Park, Mulberry Avenue, Widnes, Cheshire, WA8 0WN	0151 495 4091	1	600
8	Spalding Energy Expansion Limited	21 Holborn Viaduct, City, London, EC1A 2AT	01775 717500	1	500
9	Network Rail Infrastructure Limited	Kings Place, 90 York Way, Islington, London, N1 9AG	020 7557 8000	75	481
10	Aberdeen City Council	Town House, Broad Street, Aberdeen, Grampian, AB10 1AQ	01224 522000	4	429

TOP TEN Key Architects
Nov 2013 – Oct 2014

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Studio E Architects Limited	Palace Wharf, Rainville Road, Chiswick, London, W6 9HN	020 7385 7126	2	615
2	Weston Williamson +Partners	12 Valentine Place, Southwark, London, SE1 8QH	020 7401 8877	1	600
3	Hyder Consulting UK Limited	Manning House, 22 Carlisle Place, Westminster, London, SW1P 1JA	020 3014 9000 (CTPS)	1	250
4	Aukett Swanke	25 Christopher Street, City, London, EC2A 2BS	020 7454 8200	1	200
5	Atkins	Woodcote Grove, Ashley Road, Epsom, Surrey, KT18 5BW	01372 726140	9	186
6	Artek Design House Limited	17 Topcliffe Way, Cambridge, Cambridgeshire, CB1 8SJ	01223 519086	1	170
7	Elevation Projects Limited	1st Floor, 16 Wright Street, Hull, Humberside, HU2 8JU	01482 221155	1	150
8	Stockport Metropolitan Borough Council	Town Hall, Edward Street, Stockport, Cheshire, SK1 3XE	0161 480 4949	1	100
9	RPS Group Plc	20 Western Avenue, Milton Park, Abingdon, Oxfordshire, OX14 4SH	01235 821888	2	95
10	AHR	Norwich Union House, High Street, Huddersfield, West Yorkshire, HD1 2LR	01484 537411 (TPS)	5	88

TOP TEN Key Contractors
Nov 2013 – Oct 2014

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Babcock International Group Plc	33 Wigmore Street, Westminster, London, W1U 1QX	020 7969 0000	1	7,000
2	Balfour Beatty Group Limited	130 Wilton Road, Westminster, London, SW1V 1LQ	020 7216 6800	30	1,216
3	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111	13	766
4	Ferrovial Agroman Laing O'Rourke JV	10 Greycoat Place, City, London, SW1P 1SB	01322 296200	1	600
5	Carillion Plc	Construction House, 24 Birch Street, Wolverhampton, West Midlands, WV1 4HY	01902 422431	27	561
6	BAM Nuttall	St James House, Knoll Road, Camberley, Surrey, GU15 3XW	01276 63484	27	481
7	Costain Limited	Vanwall Business Park, Vanwall Road, Maidenhead, Berkshire, SL6 4UB	01628 842444	14	313
8	Tolent Construction Limited	Ravensworth House, 5th Avenue Business Park, Team Valley, Gateshead, Tyne and Wear, NE11 0HF	0191 487 0505	4	259
9	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	10	257
10	AMK Joint Venture	Mid City Place, 71 High Holborn, Westminster, London, WC1V 6QS	020 7645 2000	1	250

The ranking tables are compiled from Barbour ABI database and are based on the total value of contracts awarded over the previous 12 month period. The values represent the construction cost of each project.

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COMMERCIAL & RETAIL
FURTHER RISE IN CONTRACT VALUES

Contract values in the commercial & retail sector were higher this month compared to September and are significantly higher than October 2013.

The value of contracts awarded in the commercial & retail sector was £1.3 billion in October based on a three month rolling average (see Fig. 5.1). This is a 15.9% increase from September and a 74.7% increase from the October 2013 figure. In the three months to October the value of contracts were 28% above the previous three months and 80.6% higher than the same period in 2013, indicating increasing activity in the sector.

Projects by region

London was the main location of activity in the sector this month with 25.3% of the value of all contracts awarded. This was 9.6% higher than October 2013 (see Fig. 5.2 & 5.4). The South East, South West and West Midlands also experienced significant activity accounting for 15.6%, 13.9% and 12.6% of contract value respectively. The major project in the commercial sector this month was a circa 72,000 sq m commercial development near Burton-on-Trent valued at £108 million.

Type of Projects

Offices were the dominant type of project in the sector accounting for 68% of the value of contracts awarded this month, which is 4% lower than October 2013 (see Fig. 5.3). General retailing is the other significant sector with 23% of contract award value, which was an 8% increase from the October 2013 figure.

> London was the main location of activity in the sector this month

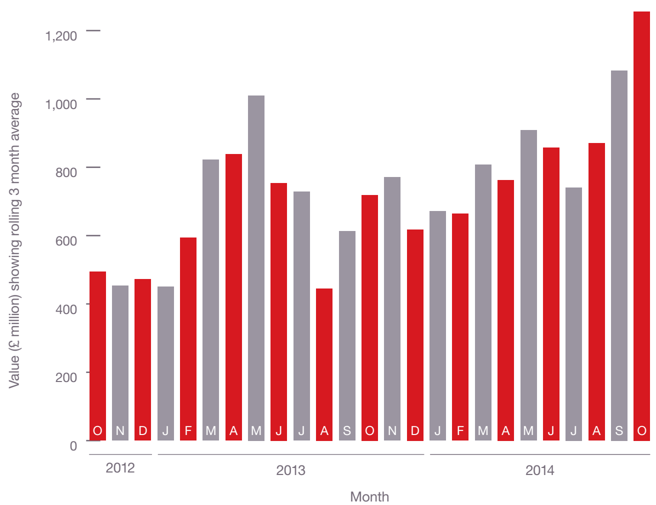

FIG. 5.1

Commercial & Retail: **Project Value showing 3 month moving average** Source: Barbour ABI

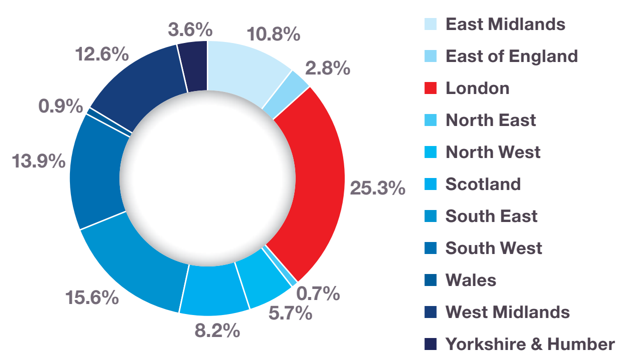

FIG. 5.2

Commercial & Retail: **Value of Contracts by Region** Source: Barbour ABI

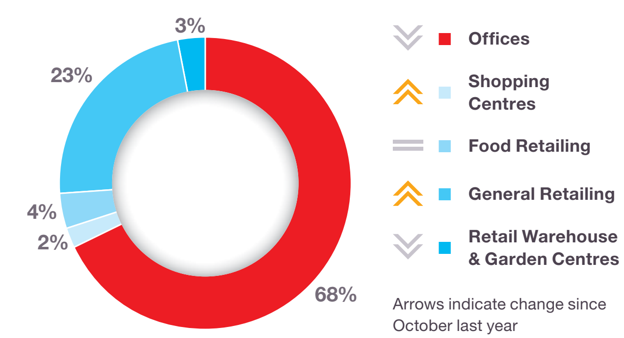

FIG. 5.3

Commercial & Retail: **Type of Projects Awarded** Source: Barbour ABI

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FURTHER RISE IN CONTRACT VALUES

The map and figures show how the activity has changed since October 2013

-10.0%	Scotland		
+8.2%	East Midlands	+7.3%	South East
-0.1%	East of England	+8.0%	South West
+9.6%	London	+0.7%	Wales
-5.3%	North East	+10.6%	West Midlands *HOTTEST REGION*
-18.7%	North West	-10.2%	Yorkshire & Humber

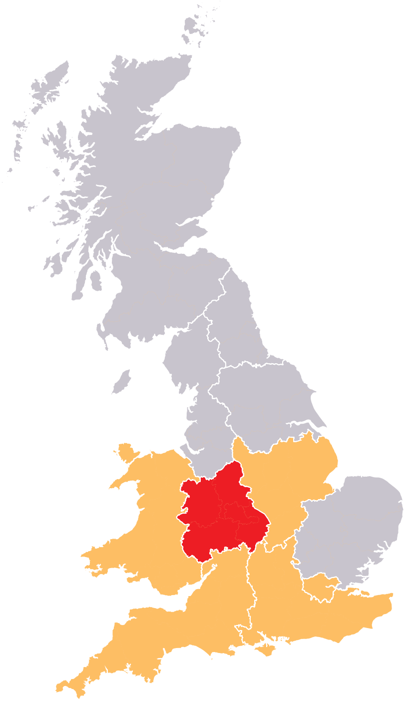
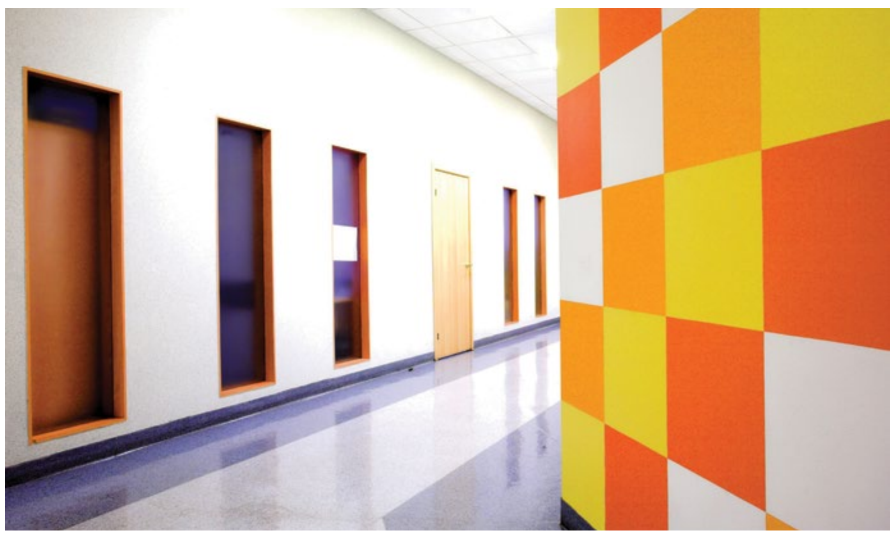


FIG. 5.4

Commercial & Retail: **Change of Activity by Region** *(since last year)* Source: Barbour ABI



"In the three months to October the value of contracts were 28% above the previous three months"

PROJECT IN FOCUS

Watermark West Quay – Phase 1
£70,000,000

County	Hampshire
Primary Category Sector	Commercial & Retail
Government Region	South East
Start Date	October 2014
End Date	October 2017
Contract Award Date	October 2014
Funding	Mainly Private
Stage	Contract
Contractor	Sir Robert McAlpine

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TOP TEN Key Clients
Nov 2013 – Oct 2014

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Battersea Power Station Development Company	Battersea Power Station, 188 Kirtling Street, South Lambeth, London, SW8 5BN	020 7501 0688 (CTPS)	1	600
2	Saxon Land BV	117 Fenchurch Street, City, London, EC3M 5DY	020 7410 7300	1	420
3	Selfridges Limited	400 Oxford Street, Westminster, London, W1A 1AB	0800 123400	5	308
4	LXB Properties PLC	Grafton House, 2nd Floor, 2-3 Golden Square, Westminster, London, W1F 9HR	020 7432 7900	8	247
5	Great Portland Estates	33 Cavendish Street, Westminster, London, W1G 0PW	020 7647 3000	3	201
6	Roydhouse Investments Limited	Roydhouse Farm, Sharp Lane, Almondbury, Huddersfield, West Yorkshire, HD4 6SX	Not listed	1	200
7	Helical Bar Plc	11-15 Farm Street, Westminster, London, W1J 5RS	020 7629 0113	4	182
8	Hammerson UK Properties Plc	10 Grosvenor Street, Westminster, London, W1K 4BJ	020 7887 1000	7	173
9	Stoke-on-Trent City Council	Civic Centre, Glebe Street, Stoke on Trent, Staffordshire, ST4 1HH	01782 234567	1	170
10	Advantage West Midlands	3 Priestley Wharf, Holt Street, Aston Science Park, Birmingham, West Midlands, B7 4BN	0121 380 3500	1	170

TOP TEN Key Architects
Nov 2013 – Oct 2014

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Wilkinson Eyre Architects	33 Bowling Green Lane, City, London, EC1R 0BJ	020 7608 7900	1	600
2	Eric Parry Architects	28-42 Banner Street, City, London, EC1Y 8QE	020 7608 9600	1	420
3	Gensler Associates	Aldgate House, 33 Aldgate High Street, City, London, EC3N 1AH	020 7073 9600	9	343
4	Make Architects	13 Fitzroy Street, Westminster, London, W1T 4BQ	020 7636 5151	6	312
5	DLA Design Group	55 St Pauls Street, Leeds, West Yorkshire, LS1 2TE	0113 887 3100	6	211
6	RHWL Partnership	Ivory House, St Katharine Docks, Tower Hamlets, London, E1W 1AT	020 7480 1500	3	200
7	Aukett Swanke	25 Christopher Street, City, London, EC2A 2BS	020 7454 8200	11	199
8	Jones Architects	121 Great Portland Street, Westminster, London, W1W 6QL	020 7255 1150	7	195
9	Allford Hall Monaghan Morris	2nd Floor, Block C, Morelands, 5-23 Old Street, City, London, EC1V 9HL	020 7251 5261	6	188
10	Fletcher Priest Architects Limited	Middlesex House, 34-42 Cleveland Street, Westminster, London, W1T 4JE	020 7034 2200	6	186

TOP TEN Key Contractors
Nov 2013 – Oct 2014

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Skanska UK	Maple Cross House, Denham Way, Maple Cross, Rickmansworth, Hertfordshire, WD3 9SW	01923 776666	5	1,210
2	Mace Limited	155 Moorgate, City, London, EC2M 6XB	020 3522 3000 (TPS)	19	584
3	McAlpine Limited	Eaton Court, Maylands Avenue, Hemel Hempstead, Hertfordshire, HP2 7TR	01442 233444	12	487
4	Bowmer & Kirkland Limited	High Edge Court, Heage, Belper, Derbyshire, DE56 2BW	01773 853131	26	435
5	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111	24	430
6	Wates Construction Limited	Wates House, Station Approach, Leatherhead, Surrey, KT22 7SW	01372 861000	15	385
7	ISG	Aldgate House, 33 Aldgate High Street, City, London, EC3N 1AG	020 7247 1717	45	329
8	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	13	225
9	Brookfield Multiplex Construction Europe Limited	99 Bishopsgate, 2nd Floor, City, London, EC2M 3XD	020 7659 3500	7	221
10	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	40	215

The ranking tables are compiled from Barbour ABI database and are based on the total value of contracts awarded over the previous 12 month period. The values represent the construction cost of each project.

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HOTEL, LEISURE & SPORT

INCREASE IN CONTRACT VALUE IN OCTOBER

The hotel, leisure & sport sector showed monthly increases in contract values and over the quarter values have also increased.

Contract award levels in the hotel, leisure & sport sector were £528 million in October, based on a three month rolling average (see Fig. 6.1). This was 28.6% higher than September and 22.3% higher than October 2013. In the three months to October the value of contracts was 32.8% higher than the previous three months. This was an increase of 10.3% compared to the same period in 2013 indicating a longer term improvement in activity.

Projects by region

Wales was the main location for hotel, leisure & sport contracts this month accounting for 43.8% of the value awarded (see Fig. 6.2 & 6.4). This was due to the Circuit of Wales motor track development contract in Gwent valued at £315 million. London was the other main location for activity in this sector accounting for 31% of the value of contracts awarded, which was 27.6% higher than at this time last year. The largest project in London in October was the All England Lawn Tennis Club Number 1 Court redevelopment valued at £150 million.

Type of Projects

Due to the significant value of the two main contracts awarded this month it is no surprise that the arenas/stadia category is the main type of contract accounting for 66% of the value of contracts in October, a 66% change from the corresponding month in 2013 (see Fig. 6.3).

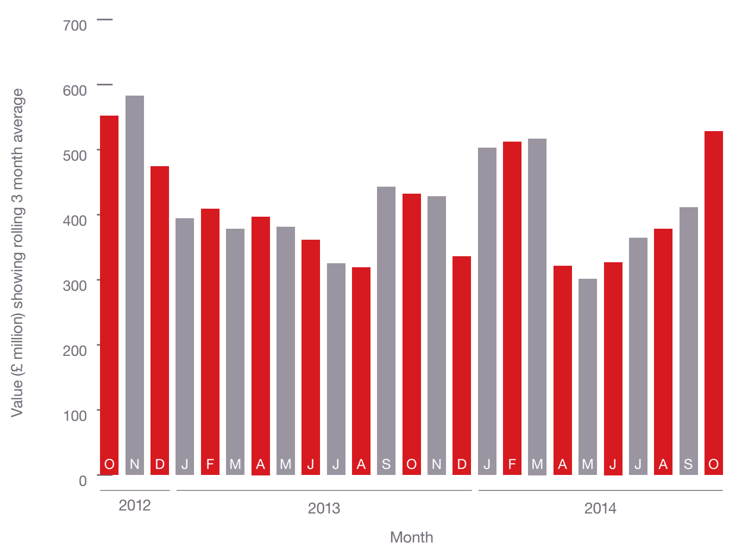

FIG. 6.1

Hotel, Leisure & Sport: **Project Value showing 3 month moving average** Source: Barbour ABI

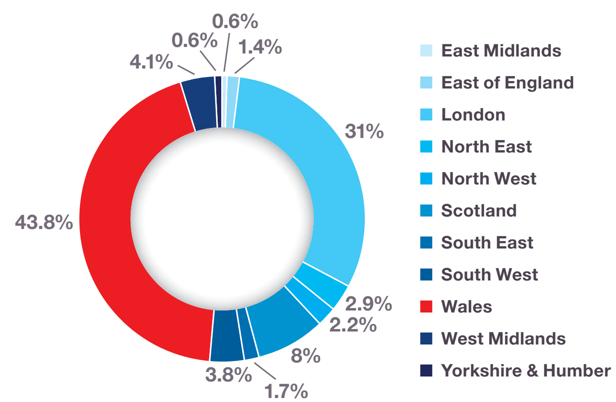

FIG. 6.2

Hotel, Leisure & Sport: **Value of Contracts by Region** Source: Barbour ABI

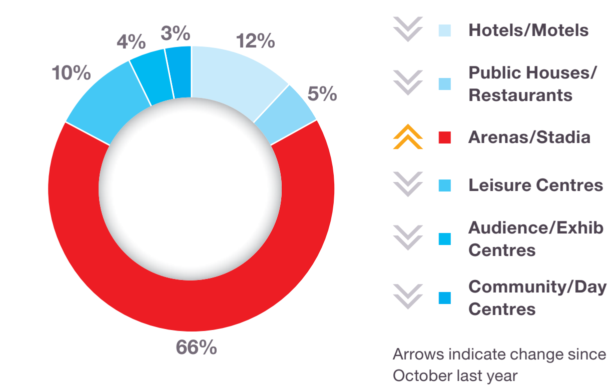

FIG. 6.3

Hotel, Leisure & Sport: **Type of Projects Awarded** Source: Barbour ABI

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The map and figures show how the activity has changed since October 2013

-9.8%	East Midlands	-4.3%	Scotland
+0.9%	East of England	-5.2%	South East
+27.6%	London	-11.3%	South West
-2.6%	North East	+43.1%	Wales *HOTTEST REGION*
-3.7%	North West	+1.0%	West Midlands
		-35.7%	Yorkshire & Humber

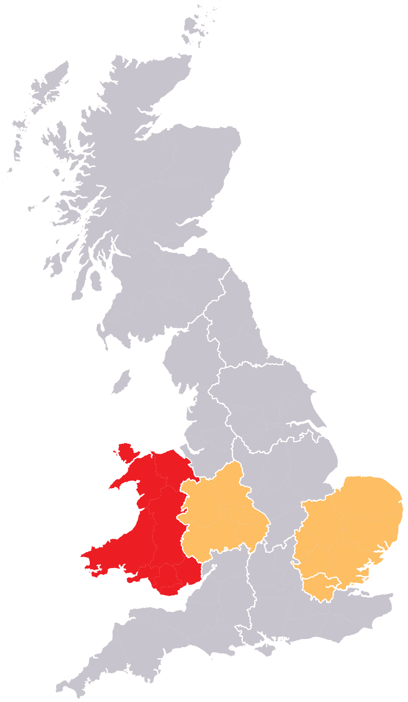

FIG. 6.4

Hotel, Leisure & Sport: **Change of Activity by Region** *(since last year)*

Source: Barbour ABI

"The arenas/stadia category is the main type of contract accounting for 66% of the value of contracts in October

PROJECT IN FOCUS

Rassau Industrial Estate – Circuit of Wales £315,000,000

County	Gwent
Primary Category Sector	Hotel, Leisure & Sport
Government Region	Wales
Start Date	April 2015
End Date	April 2022
Contract Award Date	October 2014
Funding	Mixed
Stage	Contract
Contractor	Alun Griffiths Contractors & FCC

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INCREASE IN CONTRACT VALUE IN OCTOBER

TOP TEN Key Clients
Nov 2013 – Oct 2014

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Heads of The Valleys Development Company Limited	The Coach House, 79 Mill Way, Grantchester, Cambridge, Cambridgeshire, CB3 9ND	020 7834 7102	1	315
2	All England Lawn Tennis and	Church Road, Wimbledon, London, SW19 5AE	020 8944 1066	3	165
3	London Legacy Development Corporation	Level 10, 1 Stratford Place, Montfichet Road, Stratford, London, E20 1EJ	020 3288 1800	2	164
4	London Borough of Newham	Third Floor, West Side, 1000 Dockside Road, Victoria Dock, London, E16 2QU	020 8430 2000	1	154
5	Olympic Delivery Authority (ODA)	23rd Floor, 1 Churchill Place, Canary Wharf, Poplar, London, E14 5HN	020 3201 2000	1	154
6	Whitbread PLC	Whitbread Court, Houghton Hall Business Court, Porz Avenue, Dunstable, Bedfordshire, LU5 5XE	01582 499499	26	111
7	Galliard Limited	Sterling House, Langston Road, Loughton, Essex, IG10 3TS	020 8418 1000	2	104
8	McAleer & Rushe	100 George Street, London, W1U 8NU	020 7224 4900 (CTPS)	1	100
9	Cheshire West & Chester Council	HQ, 58 Nicholas Street, Chester, Cheshire, CH1 2NP	0300 123 8123	4	83
10	Capital Construction & Development Limited	Herschel House, 58 Herschel Street, Slough, Berkshire, SL1 1PG	Not listed	1	80

TOP TEN Key Architects
Nov 2013 – Oct 2014

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Powell Dobson Architects	Charter House, Links Business Park, Fortran Road, St Mellons, Cardiff, South Glamorgan, CF3 0LT	029 2079 9699	2	318
2	Tew & Smith Architects	Quoits House, 4 Harbour Road, Kingsthorpe, Northampton, Northamptonshire, NN2 7AZ	01604 791197	1	315
3	Apex Circuit Design Limited	Unit 4 Forty Green Courtyard, Forty Green, Bedlow, Buckingham, Buckinghamshire, HP27 9PN	01844 271010	1	315
4	Populous	14 Blades Court, Deodar Road, Putney, London, SW15 2NU	020 8874 7666	5	275
5	EPR Architects Limited	30 Millbank, Westminster, London, SW1P 4DU	020 7932 7600	4	199
6	LDA Design	Worton Rectory Park, Oxford, Oxfordshire, OX29 4SX	01865 887 050 (TPS)	1	154
7	Grimshaw & Partners Limited	57 Clerkenwell Road, Westminster, London, EC1M 5NG	020 7291 4141	1	150
8	AFLS & P Architects Limited	The Cornerhouse, 91-93 Farringdon Road, City, London, EC1M 3LN	020 7831 8877	12	108
9	Swift Architecture	84 Middle Drive, Ponteland, Newcastle Upon Tyne, Tyne And Wear, NE20 9DN	07769 971 983	1	100
10	Leach Rhodes & Walker LLP	West Riverside, New Bailey Street, Manchester, Greater Manchester, M3 5AA	0161 833 0211	2	100

TOP TEN Key Contractors
Nov 2013 – Oct 2014

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Griffiths Contractors Limited	Waterways House, Merthyr Road, Llanfoist, Abergavenny, Gwent, NP7 9LR	01873 857211	1	315
2	FCC	13 Federico Salmon, Madrid, Spain, 28016	00 34 913 595 400	1	315
3	McAleer & Rushe Limited	17-19 Dungannon Road, Cookstown, County Tyrone, BT80 8TL	028 8676 3741 (CTPS)	9	235
4	Balfour Beatty Group Limited	130 Wilton Road, Westminster, London, SW1V 1LQ	020 7216 6800	8	220
5	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	8	186
6	Interserve Plc	Interserve House, Ruscombe Park, Twyford, Reading, Berkshire, RG10 9JU	0118 932 0123 (CTPS)	14	158
7	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111	15	139
8	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	5	110
9	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852	11	106
10	Carillion Plc	Construction House, 24 Birch Street, Wolverhampton, West Midlands, WV1 4HY	01902 422431	3	97

The ranking tables are compiled from Barbour ABI database and are based on the total value of contracts awarded over the previous 12 month period. The values represent the construction cost of each project.

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INDUSTRIAL
ACTIVITY DECREASES IN THE INDUSTRIAL SECTOR

The volatile industrial sector experienced a monthly and yearly decrease in contract values indicating a slowdown in activity.

Activity in the industrial sector decreased in October with the value of contracts awarded £306 million, based on a rolling three month average (see Fig. 7.1). This is a fall of 5.3% on the value in September and is 25.6% below the figure recorded this time last year. In the three months to October the total value of contracts was £1 billion which was 0.2% higher the previous three months but 3.7% lower than the same quarter last year, indicating a longer term fall in activity.

Projects by region

The South East is the region with the highest value of activity this month with 30.4% of the contracts awarded, an increase of 11.9% on October 2013 (see Fig. 7.2 & 7.4). This was principally due to the award of two warehouse contracts, the first for the toy company The Entertainer in Oxfordshire valued at £26 million and at Prologis Park in Littlebrook in Dartford worth £21 million.

Type of Projects

The types of project awarded in the sector were predominantly in warehouse/storage which accounted for 40% of contract values, although this was a decrease of 35% from October 2013 (see Fig. 7.3). Laboratories were the second most prominent type of contract accounting for 26% of the value awarded in October an increase of 25% in the corresponding month last year. This was due in large part to the award of a contract to develop a Research Design Development facility for Dyson in Wiltshire at a value of £35 million.

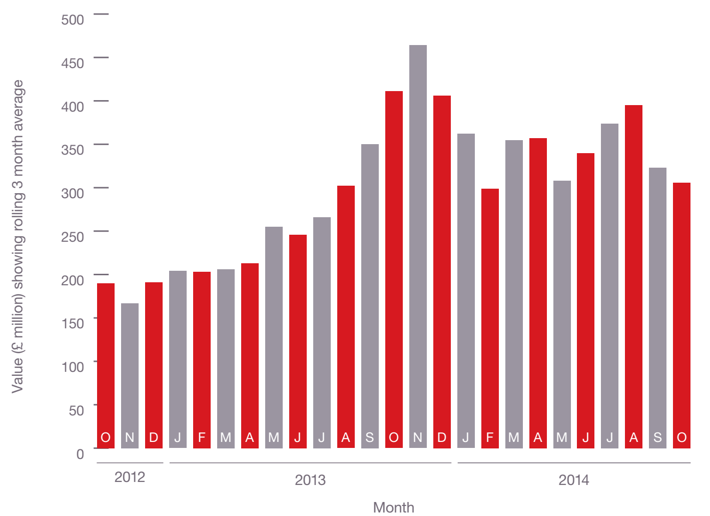

FIG. 7.1

Industrial: **Project Value showing 3 month moving average** Source: Barbour ABI

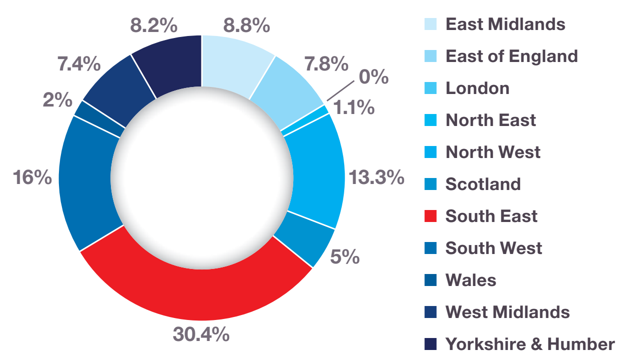

FIG. 7.2

Industrial: **Value of Contracts by Region** Source: Barbour ABI

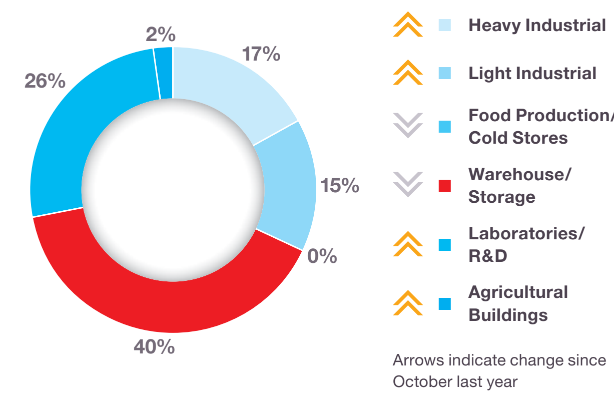

FIG. 7.3

Industrial: **Type of Projects Awarded** Source: Barbour ABI

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The map and figures show how the activity has changed since October 2013

		-0.4%	Scotland
+5.7%	East Midlands	+11.9%	South East *HOTTEST REGION*
+0.6%	East of England	-7.8%	South West
-14.5%	London	+1.7%	Wales
-6.2%	North East	+4.4%	West Midlands
+5.6%	North West	-1.1%	Yorkshire & Humber

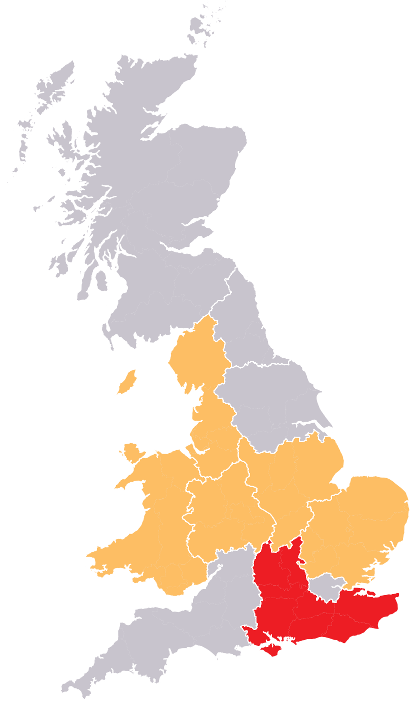

FIG. 7.4

Industrial: **Change of Activity by Region** *(since last year)*

Source: Barbour ABI

> "The South East is the region with the highest value of activity this month with 30.4% of the contracts awarded

PROJECT IN FOCUS

University Of Liverpool – Materials Innovation Factory

£23,000,000

County	Merseyside
Primary Category Sector	Industrial
Government Region	North West
Start Date	October 2014
End Date	April 2016
Contract Award Date	October 2014
Funding	Public
Stage	Subcontract
Contractor	BAM Construction

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ACTIVITY DECREASES IN THE INDUSTRIAL SECTOR

TOP TEN Key Clients
Nov 2013 – Oct 2014

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Roxhill Developments Limited	Lumonics House, Valley Drive, Swift Valley, Rugby, Warwickshire, CV21 1TQ	01788 422200	9	211
2	British Airways Plc	PO Box 365, Uxbridge, Middlesex, UB7 0GB	0844 493 0787	1	178
3	SNF Gas and Oil Limited	Solutions House, Ripley Close, Normanton Industrial Estate, Normanton, West Yorkshire, WF6 1TB	01924 311000	2	165
4	Simons Construction Limited	991 Doddington Road, Lincoln, Lincolnshire, LN6 3AA	01522 505000	1	140
5	INEOS Manufacturing Scotland Limited	PO Box 21, Bowness Road, Grangemouth, Central, FK3 9XH	01324 483422	1	125
6	BP Exploration Operating Company	Sullom Voe Terminal, Mossbank, Shetland, Islands, ZE2 9TU	01806 243 000	1	125
7	Institute Of Animal Health	Compton, Newbury, Berkshire, RG20 7NU	01635 578888	3	105
8	The Macallan Distillery	The Macallan Distillery, Craigellachie, Charlestown of Aberlour, Aberlour, Grampian, AB38 9RX	01340 871471	1	100
9	Edrington Group	2500 Great Western Road, Glasgow, Strathclyde, G15 6RW	0141 940 4000	1	100
10	Aldi Stores Limited	Holly Lane, Atherstone, Warwickshire, CV9 2SQ	01827 711800	3	100

TOP TEN Key Architects
Nov 2013 – Oct 2014

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Michael Sparks Associates	11 Plato Place, St Dionis Road, Fulham, London, SW6 4TU	020 7736 6162	19	240
2	Stephen George & Partners	170 London Road, Leicester, Leicestershire, LE2 1ND	0116 247 0557	3	152
3	AJA Architects LLP	1170 Elliot Court, Herald Avenue, Coventry Business Park, Coventry, West Midlands, CV5 6UB	024 7625 3200	11	127
4	TGE Gas Engineering GmbH UK Branch	Suite 2a, Manchester International Office Centre, Styal Road, Manchester, Greater Manchester, M22 5WB	0161 2040 000 (CTPS)	1	125
5	Ryder Architecture	Cooper Studios, 14-18 Westgate Road, Newcastle Upon Tyne, Tyne And Wear, NE1 3NN	0191 269 5454	4	125
6	Chetwood Associates	12-13 Clerkenwell Green, City, London, EC1R 0QJ	020 7490 2400	2	105
7	Rogers Stirk Harbour and Partners	Thames Wharf Studios, Rainville Road, Hammersmith, London, W6 9HA	020 7385 1235	1	100
8	Smith Carter	1600 Buffalo Place, Winnipeg MB, Canada	00 1 204 477 1260	2	90
9	PHP Architects	The Old Rectory, 31 Rectory Lane, Milton Malsor, Northampton, Northamptonshire, NN7 3AQ	01604 858 916	6	88
10	Dalkin Scotton Partnership	305 Fort Dunlop, Fort Parkway, Birmingham, West Midlands, B24 9FD	0121 747 1943	3	76

TOP TEN Key Contractors
Nov 2013 – Oct 2014

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Winvic Construction	19 Tenter Road, Moulton Park, Northampton, Northamptonshire, NN3 6PZ	01604 678960 (CTPS)	20	249
2	McLaren Construction Limited	McLaren House, 100 Kings Road, Brentwood, Essex, CM14 4EA	01277 205800	4	170
3	Roxhill Developments Limited	Lumonics House, Valley Drive, Swift Valley, Rugby, Warwickshire, CV21 1TQ	01788 422200	2	165
4	Robertson Construction	10 Perimeter Road, Pinefield Industrial Estate, Elgin, Grampian, IV30 6AE	01343 548621	6	133
5	Jacobs Limited	Jacobs House, 427 London Road, Earley, Reading, Berkshire, RG6 1BL	01189 635 331	3	128
6	Shepherd Construction Limited	Frederick House, Fulford Road, York, North Yorkshire, YO10 4EA	01904 634431	2	122
7	Buckingham Group Contracting Limited	Blackpit Farm, Silverstone Road, Stowe, Buckingham, Buckinghamshire, MK18 5LJ	01280 823355	11	112
8	ISG	Aldgate House, 33 Aldgate High Street, City, London, EC3N 1AG	020 7247 1717	6	109
9	Vinci Construction UK Limited	Astral House, Imperial Way, Watford, Hertfordshire, WD24 4WW	01923 233433	4	79
10	Sisk & Son Limited	1 Curo Park, Frogmore, St Albans, Hertfordshire, AL2 2DD	01727 875551	6	78

The ranking tables are compiled from Barbour ABI database and are based on the total value of contracts awarded over the previous 12 month period. The values represent the construction cost of each project.

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MEDICAL & HEALTH

INCREASE IN VALUE CONTRACTS IN OCTOBER

The monthly value of medical & health contracts increased in October but declined on those recorded last year indicating a slight fall in longer term activity.

Levels of activity in the medical & health sector increased by 38.2% in October 2014 compared to September, with the total value of contracts awarded £240 million based on a three month rolling average (see Fig. 8.1). This is 43.2% higher than the values in October 2013. In the three months to October the value of contracts decreased by 8.2% on the previous three months, and was 1.2% down on the same period in 2013, indicating a marginal longer term decline in the value of contracts awarded in the sector.

Projects by region

The East of England was the main location of development in the sector this month capturing 53.8% of activity, a substantial 38.3% increase from October 2013 (see Fig. 8.2 & 8.4). This is primarily due to the award for the contract to build the new Papworth Hospital in Cambridgeshire which is valued at £150 million.

Type of Projects

This contract award means that public hospitals are the dominant sub-sector this month accounting for 74% of the value of contracts in October 2014, a 45% increase from the same month last year (see Fig. 8.3).

> Levels of activity increased by 38.2% in October 2014 compared to September

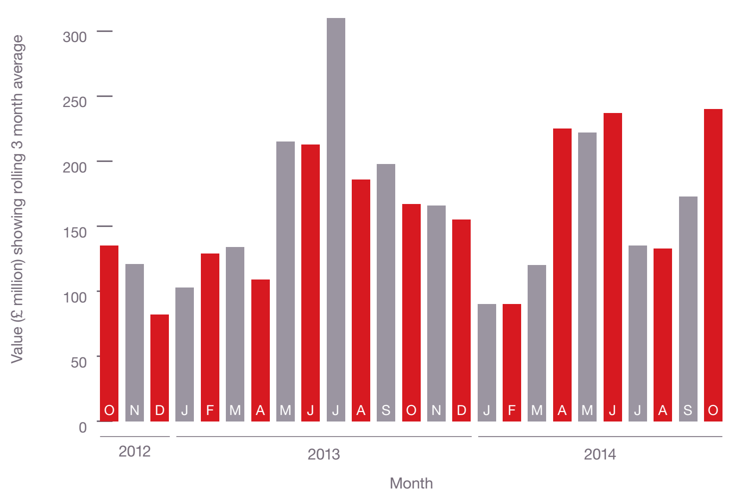

FIG. 8.1

Medical & Health: **Project Value showing 3 month moving average** Source: Barbour ABI

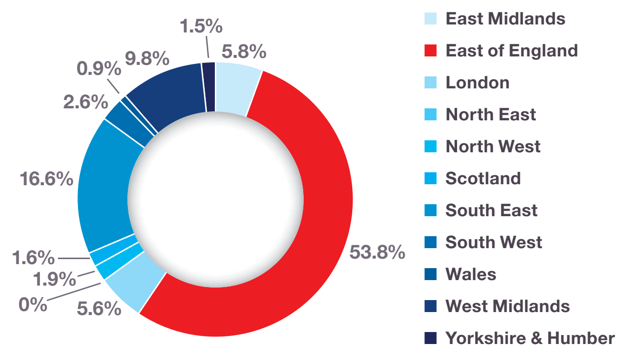

FIG. 8.2

Medical & Health: **Value of Contracts by Region** Source: Barbour ABI

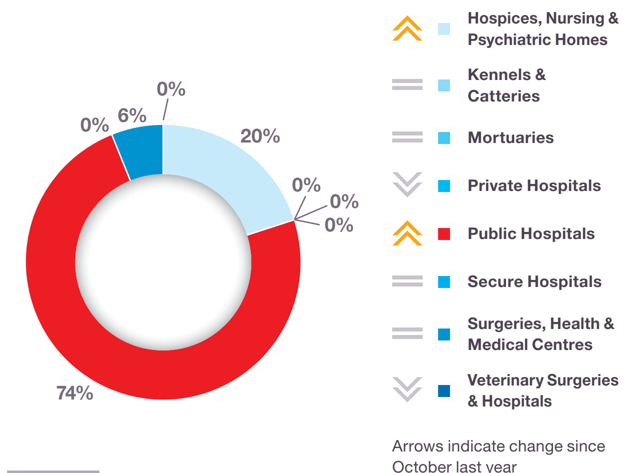

FIG. 8.3

Medical & Health: **Type of Projects Awarded** Source: Barbour ABI

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The map and figures show how the activity has changed since October 2013

		-5.2%	Scotland
+5.2%	East Midlands	+10.6%	South East
+38.3%	East of England *HOTTEST REGION*	-1.1%	South West
-53.3%	London	+0.9%	Wales
-0.7%	North East	+8.2%	West Midlands
-0.3%	North West	-2.5%	Yorkshire & Humber

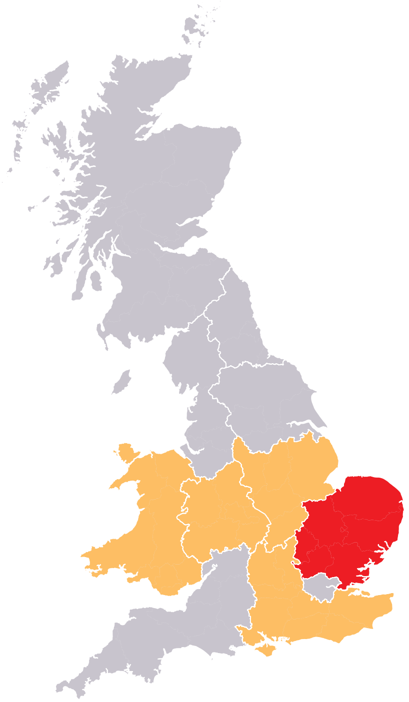

FIG. 8.4

Medical & Health: **Change of Activity by Region** *(since last year)* Source: Barbour ABI

Outlook

The National Infrastructure Plan 2012 commits £4.6 billion in health and social care capital in 2014-2015 and £4.7 billion in 2015-2016 including investment of £1.4 billion in hospital upgrades and redevelopments which suggests that this sector will improve in the medium term. The commitment to continue to protect health budgets was included in the Budget in March indicating this spending will occur.

> Public hospitals are the dominant sub-sector this month

PROJECT IN FOCUS

www.penoyre-prasad.net

Oak Park Health and Wellbeing Campus £45,000,000

County	Hampshire
Primary Category Sector	Medical & Health
Government Region	South East
Start Date	October 2015
End Date	October 2019
Contract Award Date	October 2014
Funding	Mixed
Stage	Contract
Contractor	Ashley House

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INCREASE IN VALUE CONTRACTS IN OCTOBER

TOP TEN Key Clients
Nov 2013 – Oct 2014

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Royal Liverpool and Broadgreen Hospital NHS Trust	Prescot Street, Liverpool, Merseyside, L7 8XP	0151 706 2000	3	355
2	Royal National Orthopaedic Hospital NHS Trust	Brockley Hill, Stanmore, Middlesex, HA7 4LP	020 8954 2300	1	263
3	Christie Hospital NHS Trust	Christie Hospital, 550 Wilmslow Road Withington, Manchester, Greater Manchester, M20 4BX	0161 446 3000	1	250
4	Dumfries & Galloway Health Board	Crichton Royal Hospital, Dumfries, Dumfries and Galloway, DG1 4TG	01387 244000	1	200
5	Papworth Hospital NHS Trust	Papworth Hospital, Papworth Everard, Cambridge, Cambridgeshire, CB23 3RE	01480 830541	1	150
6	Royal Infirmary of Edinburgh NHS Trust	51 Little France Crescent, Old Dalkeith Road, Edinburgh, Lothian, EH16 4SA	0131 536 1000 (CTPS)	2	73
7	Great Ormond Street Hospital NHS Trust	Great Ormond Street, Westminster, London, WC1N 3JH	020 7405 9200 (CTPS)	1	60
8	The Trustees of the London Clinic	20 Devonshire Place, Westminster, London, W1G 6BW	020 7935 4444	1	55
9	University Hospitals of Leicester NHS Trust	Leicester Royal Infirmary, Infirmary Square, Leicester, Leicestershire, LE1 5WW	0300 303 1573	2	53
10	St Andrews Healthcare	Billing Road, Northampton, Northamptonshire, NN1 5DG	01604 616000	3	52

TOP TEN Key Architects
Nov 2013 – Oct 2014

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	HKS International Limited	82 Dean Street, Westminster, London, W1D 3SP	020 7292 9494 (TPS)	2	585
2	Devereux Architects Limited	Zeeta House, 200 Upper Richmond Road, Putney, London, SW15 2SH	020 8780 1800	5	415
3	HOK International Limited	Qube, 90 Whitfield Street, Westminster, London, W1T 4EZ	020 7636 2006	3	413
4	NBBJ	The Clove Building, 4-6 Maguire Street, Greenwich, London, SE1 2NQ	020 7549 3700	1	335
5	Keppie Design	160 West Regent Street, Glasgow, Strathclyde, G2 4RL	0141 204 0066	11	321
6	P+HS Architects	The Old Station, Station Road, Stokesley, Middlesbrough, Cleveland, TS9 7AB	01642 712684	15	118
7	Building Design Partnership	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	2	81
8	HLM Architects	46 Loman Street, Southwark, London, SE1 0EH	020 7921 4800	1	72
9	Murphy Philipps Architects Limited	140 Old Street, City, London, EC1V 9BJ	020 7490 8008	3	63
10	Llewelyn Davies	44-46 Whitfield Street, Westminster, London, W1T 2RJ	020 7907 7900	1	60

TOP TEN Key Contractors
Nov 2013 – Oct 2014

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Carillion Plc	Construction House, 24 Birch Street, Wolverhampton, West Midlands, WV1 4HY	01902 422431	4	360
2	Interserve Plc	Interserve House, Ruscombe Park, Twyford, Reading, Berkshire, RG10 9JU	0118 932 0123 (CTPS)	14	337
3	Skanska UK	Maple Cross House, Denham Way, Maple Cross, Rickmansworth, Hertfordshire, WD3 9SW	01923 776666	4	211
4	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	3	207
5	Brookfield Multiplex Construction Europe Limited	99 Bishopsgate, 2nd Floor, City, London, EC2M 3XD	020 7659 3500	7	87
6	Balfour Beatty Group Limited	130 Wilton Road, Westminster, London, SW1V 1LQ	020 7216 6800	7	76
7	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111	17	64
8	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852	4	60
9	Coffey Construction Limited	93-95 Greenford Road, Harrow, Middlesex, HA1 3QF	020 8426 4944 (CTPS)	1	55
10	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	5	47

The ranking tables are compiled from Barbour ABI database and are based on the total value of contracts awarded over the previous 12 month period. The values represent the construction cost of each project.

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EDUCATION
DECREASE IN THE VALUE OF CONTRACTS IN OCTOBER

The education sector declined this month but activity is still much higher than this time last year indicating better long term performance in this sector.

The value of contracts awarded in the education sector was £721 million in October based on a three month rolling average, an 11.1% decrease from September (see Fig. 9.1). This figure was 34.3% higher than October 2013 indicating the sectors improvement over the past year. The values of contract awards in the three months to October were 43.5% higher than the same period last year, showing the longer term growth in contracts awarded.

Projects by region

The main location of activity this month was London which accounted for 29% of the value of projects, which was a 16.9% increase from October 2013 (see Fig. 9.2 & 9.4). This is primarily due to the award of a graduate centre at Queen Mary University in Tower Hamlets valued at £36 million and an extension at the Royal College of Art with a contract value of £21 million. The South East is the next most popular location for education projects in October accounting for 23.2% of the total value. This is in part due to two developments at Cambridge University awarded in the month. The first is the Cambridge Judge Business School extension valued at £21 million and the Addenbrookes Clinical Research Centre valued at £12 million.

> College and university dominate the sector this month

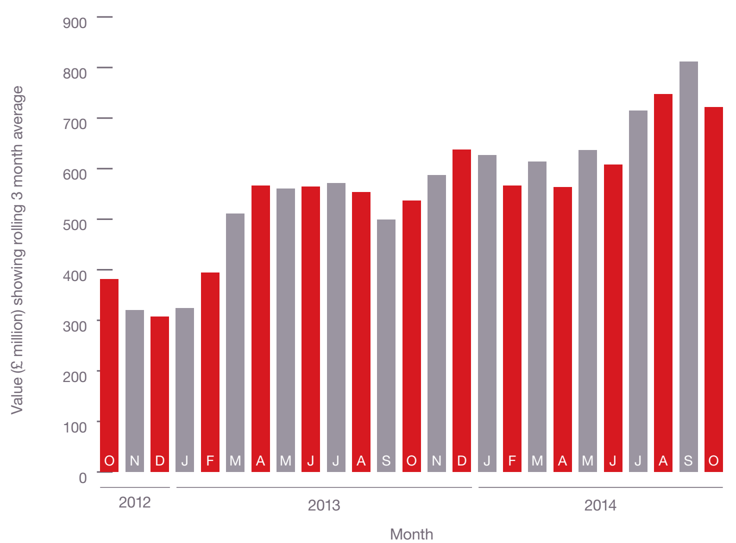

FIG. 9.1

Education: **Project Value showing 3 month moving average** Source: Barbour ABI

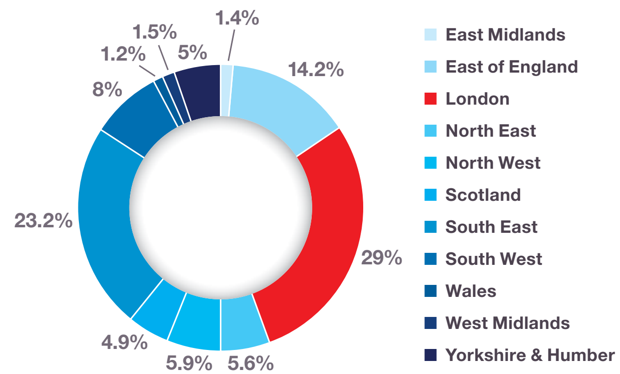

FIG. 9.2

Education: **Value of Contracts by Region** Source: Barbour ABI

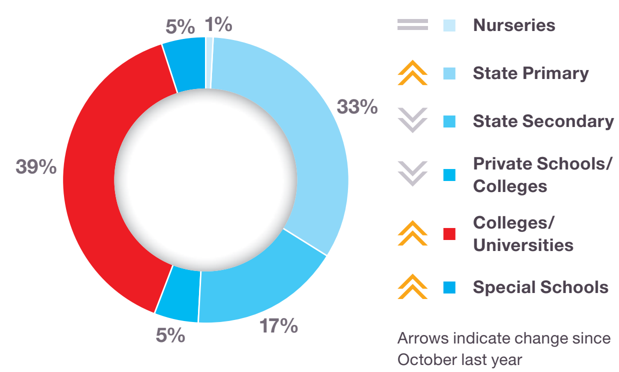

FIG. 9.3

Education: **Type of Projects Awarded** Source: Barbour ABI

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The map and figures show how the activity has changed since October 2013			-10.1%	Scotland
-3.3%	East Midlands		-0.5%	South East
+3.5%	East of England		+1.2%	South West
+16.9%	London *HOTTEST REGION*		-1.4%	Wales
+2.2%	North East		-9.1%	West Midlands
+0.8%	North West		-0.4%	Yorkshire & Humber

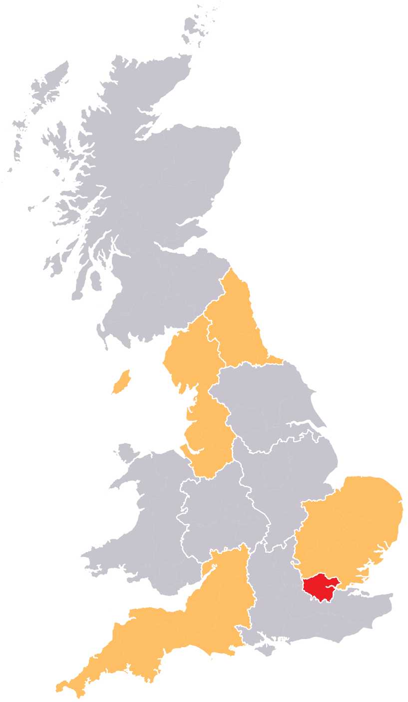

FIG. 9.4

Education: **Change of Activity by Region** *(since last year)* Source: Barbour ABI

Type of Projects

These further education projects mean that college and university dominate the sector this month accounting for 39% of the total value of projects awarded in October (see Fig. 9.3).

Outlook

In the Budget 2014 the Government announced a series of measures that will impact the value of contracts awarded in the Education sector in the coming years. These included:

- **£106 million over 5 years to fund around 20 additional Centres for Doctoral Training**
- **An additional £85 million in 2014/15 and 2015/16 to extend the Apprenticeship Grant for Employers scheme**

PROJECT IN FOCUS

Queen Mary University of London – New Graduate Centre
£36,000,000

County	London
Primary Category Sector	Education
Government Region	London
Start Date	September 2014
End Date	September 2016
Contract Award Date	October 2014
Funding	Mainly Private
Stage	Contract
Contractor	Bouygues (UK) Limited

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TOP TEN Key Clients

Nov 2013 – Oct 2014

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Department For Education	Castle View House, East Lane, Runcorn, Cheshire, WA7 2AA	0370 000 2288	117	1,078
2	Imperial College London	Estates Division, South Kensington Campus, Exhibition Road, South Kensington, London, SW7 2DB	020 7589 5111	9	166
3	Kent County Council	County Hall, County Road, Maidstone, Kent, ME14 1XQ	03000 414141	40	160
4	Ministry of Defence	Whitehall, Westminster, London, SW1A 2HB	020 7218 9000	2	123
5	University of Bath	Claverton Down Road, Claverton Down, Bath, North East Somerset, BA2 7AU	01225 388388	9	96
6	Hertfordshire County Council	County Hall, Pegs Lane, Hertford, Hertfordshire, SG13 8DN	0300 123 4040	20	75
7	Highland Council	Glenurquhart Road, Inverness, Highlands, IV3 5NX	01463 702000	4	70
8	University of Oxford	The Malthouse, Tidmarsh Lane, Oxford, Oxfordshire, OX1 1NQ	01865 270000 (CTPS)	6	66
9	University of Surrey	Estates Office, Stag Hill, Guildford, Surrey, GU2 7XH	01483 300800	6	57
10	Cambridgeshire County Council	Castle Court, Shire Hall, Castle Hill, Cambridge, Cambridgeshire, CB3 0AP	0345 0455 200	10	57

TOP TEN Key Architects

Nov 2013 – Oct 2014

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	AHR	Norwich Union House, High Street, Huddersfield, West Yorkshire, HD1 2LR	01484 537411 (TPS)	41	358
2	Bond Bryan Partnership	The Congregational Church, The Church Studio, Springvale Road, Sheffield, South Yorkshire, S10 1LP	0114 266 2040 (TPS)	46	324
3	Atkins	Woodcote Grove, Ashley Road, Epsom, Surrey, KT18 5BW	01372 726140	34	172
4	Stride Treglown Limited	Promenade House, The Promenade, Clifton Down, Bristol, Avon, BS8 3NE	0117 974 3271 (TPS)	26	172
5	JM Architects	64 Queen Street, Edinburgh, Lothian, EH2 4NA	0131 652 1666	6	140
6	HLM Architects	46 Loman Street, Southwark, London, SE1 0EH	020 7921 4800	19	140
7	Ellis Williams Architects	Wellfield, Chester Road, Preston Brook, Runcorn, Cheshire, WA7 3BA	01928 752200	23	122
8	AMEC Group PLC	76-78 Old Street, City, London, EC1V 9RU	020 3215 1700	1	121
9	Sheppard Robson	77 Parkway, Camden Town, London, NW1 7PU	020 7504 1700	6	110
10	Building Design Partnership	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	10	105

TOP TEN Key Contractors

Nov 2013 – Oct 2014

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111	127	649
2	BAM Construction	Breakspear Park, Breakspear Way, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	38	434
3	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852	68	419
4	Interserve Plc	Interserve House, Ruscombe Park, Twyford, Reading, Berkshire, RG10 9JU	0118 932 0123 (CTPS)	69	391
5	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	77	372
6	Miller Developments Limited	Miller House, 2 Lochside View, Edinburgh Park, Edinburgh, Lothian, EH12 9DH	0870 336 5000	26	302
7	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	19	253
8	Balfour Beatty Group Limited	130 Wilton Road, Westminster, London, SW1V 1LQ	020 7216 6800	40	237
9	Wates Construction Limited	Wates House, Station Approach, Leatherhead, Surrey, KT22 7SW	01372 861000	31	215
10	ISG	Aldgate House, 33 Aldgate High Street, City, London, EC3N 1AG	020 7247 1717	30	146

The ranking tables are compiled from Barbour ABI database and are based on the total value of contracts awarded over the previous 12 month period. The values represent the construction cost of each project.

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