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Barbour ABI | Building | bd

NOVEMBER 2015

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

Michael Dall

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. Michael is also a regular contributor to Building magazine, sits on the current CPA Forecasting Panel as well as being frequently noted in construction trade and the national press.

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Our Economist Michael Dall offers bespoke research and tailored analysis as well as providing consultations and speaking at industry events. Economist Michael Dall, works with customers to offer bespoke research and tailored analysis specific for your individual business. He currently provides consultations, detailed research as well as attend speaking events, speaking on topics related to your individual business needs.

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

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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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UK ECONOMIC GROWTH SLOWS TO 0.5% IN Q3

The latest GDP figures for the UK economy were released in the last month showing that the UK economy had grown by 0.5% in the third quarter of 2015.

This was below the 0.7% rate of growth experienced in the second quarter of 2015 and is an indication that the economy lost some momentum over the summer months.

While the total level of output is now comfortably above its pre-recession peak the pattern of growth within the economy is still very much focussed towards the dominant service sector. The latest figures show that the service sector is now 11.1% higher than its pre-recession peak while construction is currently 4.4% below and manufacturing is 6.3% below. This indicates the scale of the challenge of rebalancing the economy towards manufacturing and construction given the dominance of the service sector.

The labour market continues to perform particularly strongly in the UK, however with further falls in the period July to September. The rate of unemployment is currently 5.3% for those aged 16 and over, down from 5.5% in the three months to June 2015. The levels of unemployment are at the lowest point since May 2008 and the levels of employment are currently at the highest since records began.

Other news this month on the UK economy includes:

- **A "deeply concerning" slowdown in trade caused the OECD to reduce its forecasts for global economic growth in 2015 to 2.9%, down from 3% in September**
- **In further challenges to the manufacturing sector export orders fell at the fastest pace in three and domestic orders declined for the first time since 2013 according to the CBI**
- **A survey by The Legatum Institute showed that the UK is seen as the best country in the EU to start a business in.**

> The economy lost some momentum over the summer months

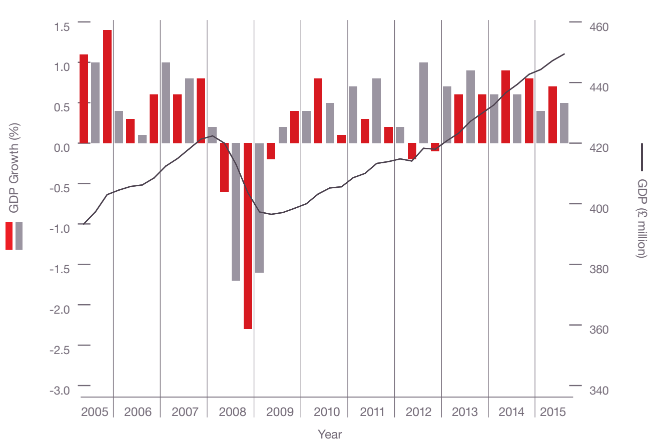

Fig. 1.1 UK Economic Growth and the PMI Source: ONS, Markit, CIPS

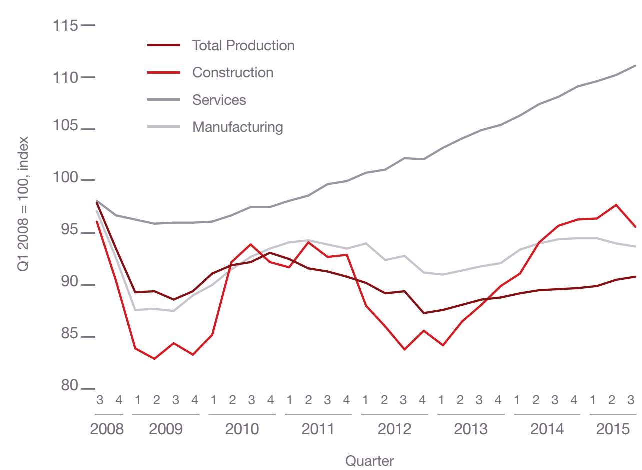

Fig. 1.2 UK GDP Source: ONS

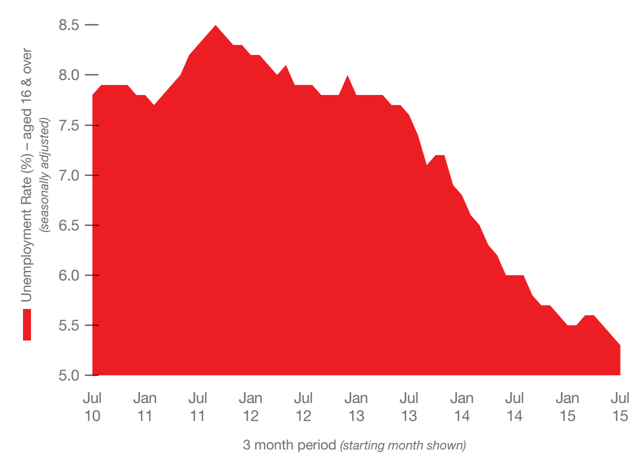

Fig. 1.3 Unemployment Rate Source: ONS

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RESIDENTIAL PROJECT INCREASE BOOSTS CONSTRUCTION

A number of high value residential contracts were awarded in October which signified a return to higher levels of activity in the sector after the post election lull.

The latest figures from the ONS show that the construction sector decreased by 2.2% between July Q2 and Q3 2015. Comparing output levels with Q3 last year showed a decrease of 0.1%.

Every individual sector apart from infrastructure and private industrial experienced quarter on quarter falls, with public housing decreasing by 12.7%. This was also significantly down by 23.3% on the same quarter last year. Private housing was slightly down (2.6%) on the previous quarter but is still 1% higher than Q3 2015. Private Commercial was down slightly by 2.6% on Q2 and by 2% on Q3 2014. Encouragingly infrastructure was 30.8% up on the same quarter last year.

The CPA/Barbour ABI Index which measures the level of contracts awarded using January 2010 as its base month recorded a reading of 161 for October. This is an increase from the previous month and continues to support the view that overall activity in the industry remains strong despite the official statistics showing a slow down. The readings for Private Housing remain high at 235. Commercial offices activity also increased in October particularly, recording a figure of 155 up from 139 in September.

	% change	
	Quarter 3 2014 – Quarter 3 2015	Quarter 2 2015 – Quarter 3 2015
Total All Work	**-0.1**	**-2.2**
All New Work	**3.0**	**-2.2**
Public Housing	-23.3	-12.7
Private Housing	1.0	-2.6
Infrastructure	30.8	0.8
Public (ex Infrastructure)	-7.0	-5.5
Private Industrial	8.8	9.0
Private Commercial	-2.0	-2.6
Repair & Maintenance	**-5.1**	**-2.1**
Public Housing	-3.0	-4.2
Private Housing	-0.3	-0.9
Non-Housing	-9.1	-2.3

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

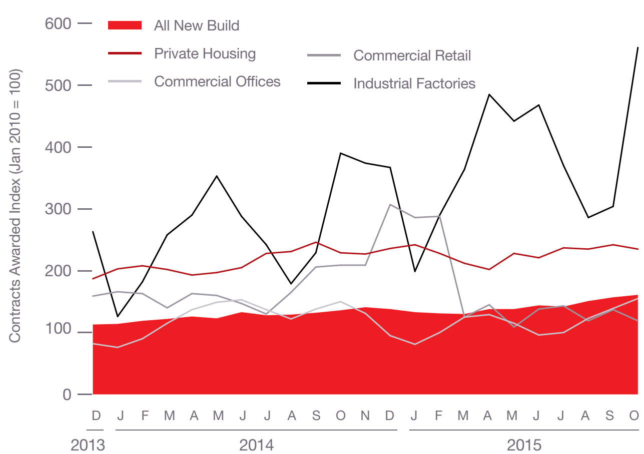

Fig. 2.2 **Contracts Awarded** Source: CPA/Barbour ABI

Construction Sector

According to Barbour ABI data on all contract activity, October witnessed an increase in construction activity levels with the value of new contracts awarded £7.4 billion, based on a three month rolling average. This is a 5.3% increase from September and a 24% increase on the value recorded in October 2014. The number of construction projects within the UK in October increased by 14.6% on September, and were 13.9% higher than October 2014.

Projects by Region

The majority of the contracts awarded in October by value were in London, accounting for 17% of the UK total. This is followed by Scotland with 15% of contract value. In London, the major commercial office project at the Olympic Park, known as the International Quarter, was awarded in October with a value of £150 million. The proposals are for a 20 storey office building with retail providing over 60,000 square metres of office space. There was also a large residential project awarded in October for the City North Development at Finsbury Park, a 350 unit scheme with a value of £120 million. In Scotland there were two large projects of note in October. The first was the Aberdeen to Inverness train line improvement which was awarded to BAM Nuttall and has a project

> "The construction sector decreased by 2.2% between July Q2 and Q3 2015

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value of £170 million. The other was a renewable energy project, a feature of the Scottish construction market in 2015, called the Blahraidh wind farm in the Highlands which has a project value of £170 million.

Types of Project

Residential had the highest proportion of contracts awarded by value in October with 49% of the total value of projects awarded. This is a sign of a return to higher activity levels in the sector as infrastructure dominated contracts awarded in recent months. The commercial sector had the next highest share of contract value, accounting for 15% of all contracts awarded in October.

> London accounted for 17% of the UK total

> Residential had the highest proportion of contracts awarded by value

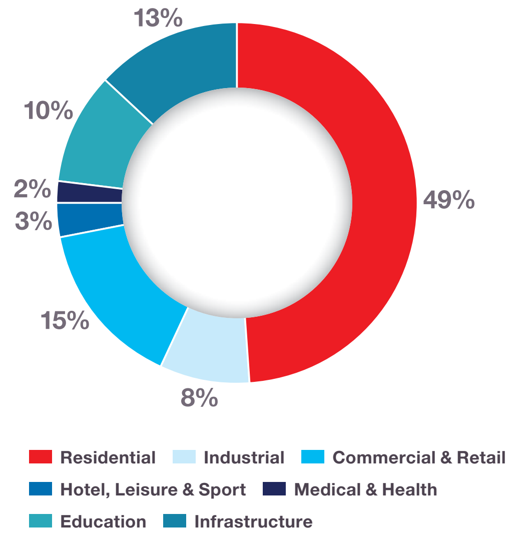
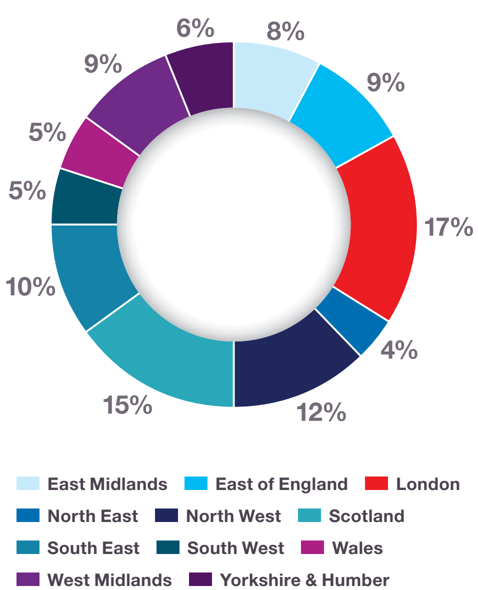


Fig. 2.5 **Type of Projects** Source: Barbour ABI



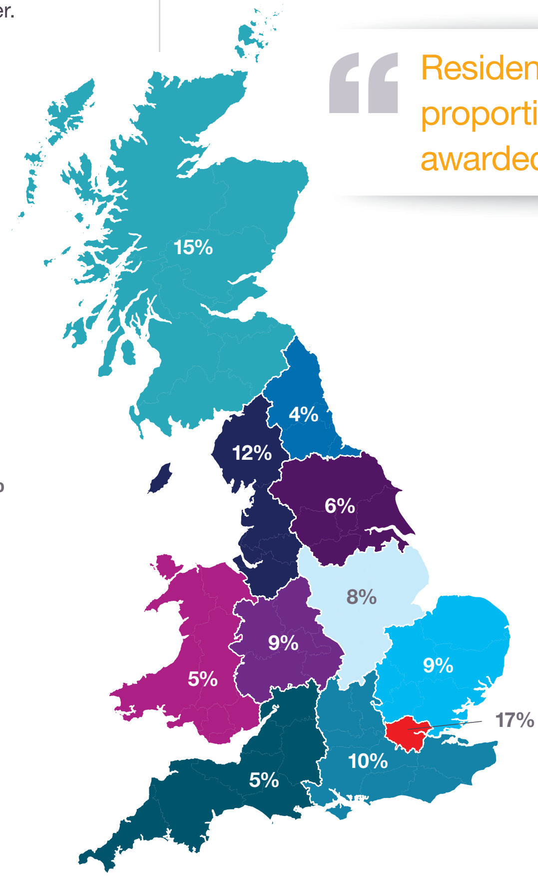


Fig. 2.3 **Locations of Contracts Awarded** Source: Barbour ABI

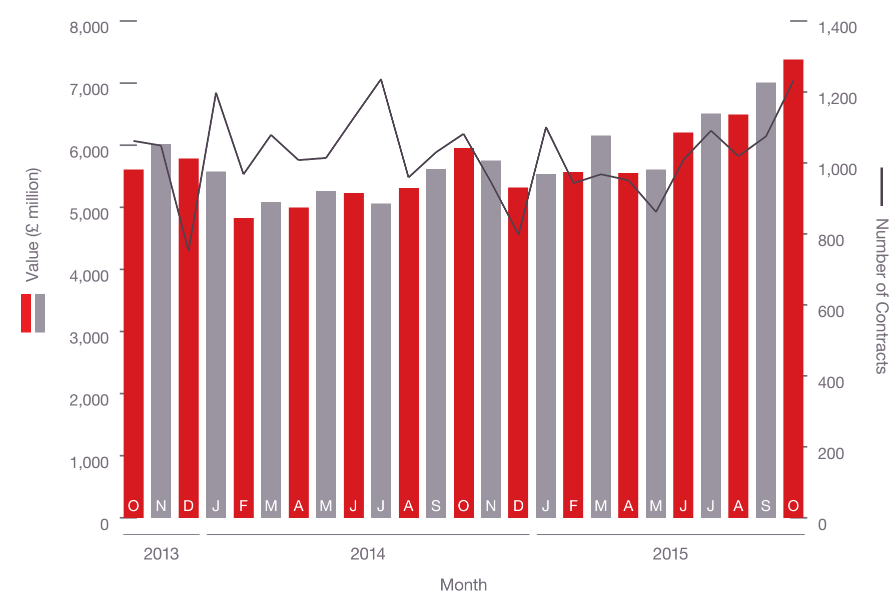


Fig. 2.4 **Construction Activity Trends** Source: Barbour ABI

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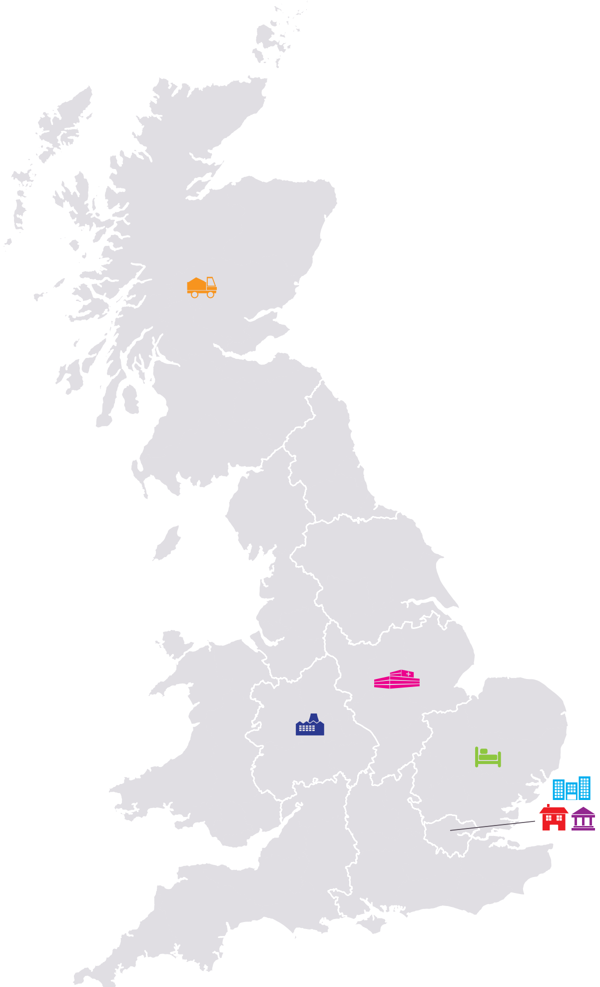
A snippet of this month's regional activity

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



- Residential
- Infrastructure
- Commercial & Retail
- Hotel, Leisure & Sport
- Industrial
- Medical & Health
- Education

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
City North Development – Finsbury Park
£120,000,000

INFRASTRUCTURE
Altens East Industrial Estate – Materials Recycling Facility
£16,000,000

COMMERCIAL & RETAIL
The International Quarter – Building S5
£150,000,000

HOTEL, LEISURE & SPORT
O'Callaghan Hotel
£15,000,000

INDUSTRIAL
Cell Therapy Catapult – Cell Therapy Manufacturing Centre
£26,000,000

MEDICAL & HEALTH
Chesterfield Royal Hospital – Macmillan Cancer Centre
£9,000,000

EDUCATION
Manchester Business School Redevelopment – Phase 2
£40,000,000

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RESIDENTIAL

RESIDENTIAL UNITS RISE SLIGHTLY IN OCTOBER

October heralded a slight increase in residential units awarded but the value of projects increased significantly pointing to improving sentiment.

Activity in the residential sector increased in October with the total number of units awarded at 11,568, based on a three month rolling average (see Fig. 3.1). This is a 2.8% increase compared to September but is 14.7% lower than October 2014, indicating that new contract activity for units in the residential sector is lower in 2015 than last year. However, the value of projects associated with residential contracts awarded increased by 41.6% between September and October based on a three month rolling average, and is 31.3% higher than October 2014. Taken together these statistics are suggestive of an increase in the number of high value schemes rather than high density ones. It is a pattern which will be monitored to assess whether this is a sustained increase or simply pent-up demand after the post-election declines in activity. Given that the long term fundamentals that have been driving growth, in particular help for first time buyers, the market should remain confident for the long term growth of the sector.

Sector Performance

The latest house price indices for October from Nationwide showed that average house prices are increasing at 3.9% annually, an increase from 3.8% in September. This compares to a figure of 9.0% this time last year which shows the softening in house price growth over recent months. Halifax reported annual house price rises of 9.7% in the three months to October, an increase from 9% in September.

The stock market performance of the housebuilders started to recede in the last month following recent historic highs. A number of the larger house builders had their rating downgraded by some brokers with build cost inflation worries cited. However, trading updates from Persimmon and Barratt still appeared strong with the latter announcing a 20% increase in forward sales in the five months to November.

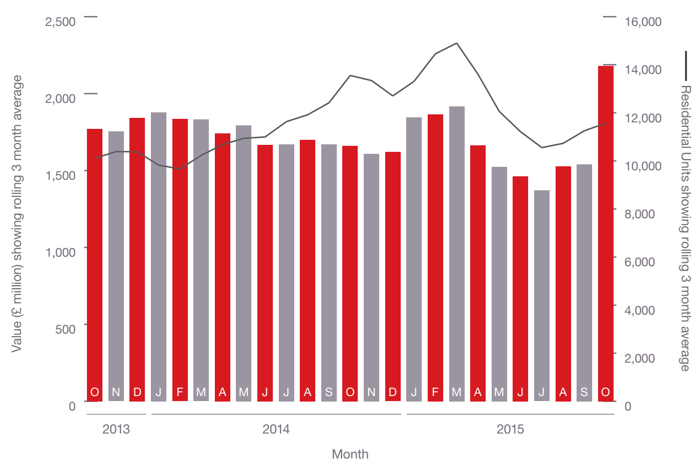


FIG. 3.1

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

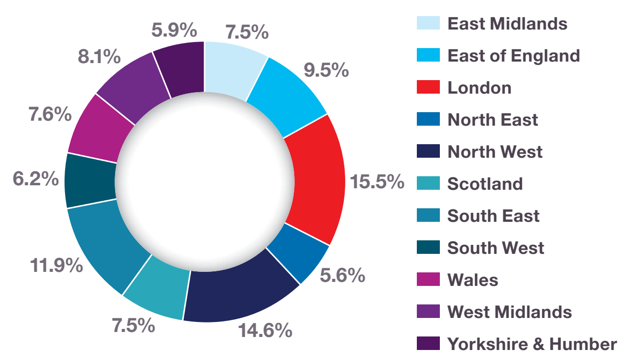
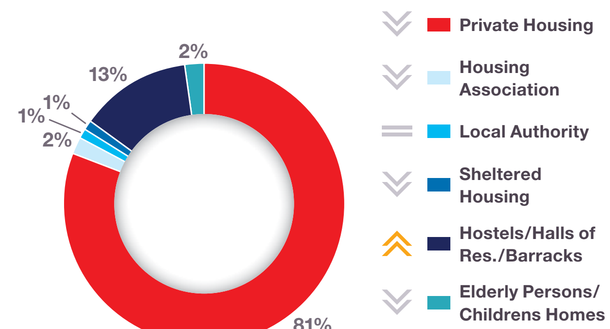


FIG. 3.2

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



Arrows indicate change since October last year

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 2014		+0.2%	Scotland
+1.2%	East Midlands	-1.3%	South East
+5.1%	East of England	-7.7%	South West
-11.8%	London	+3.7%	Wales
+2.8%	North East	+0.7%	West Midlands
+8.1%	North West *HOTTEST REGION*	-0.9%	Yorkshire & Humber

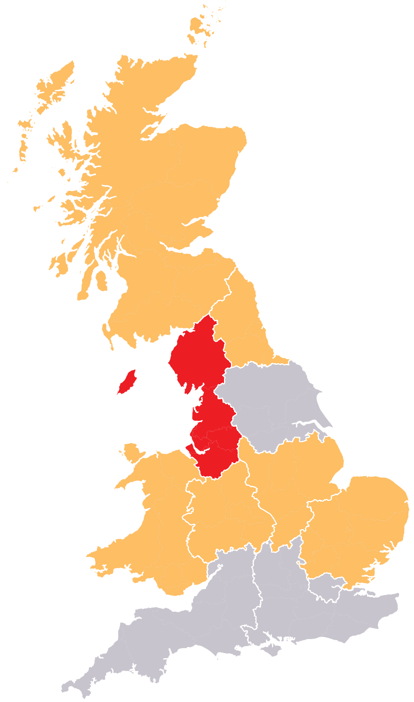

FIG. 3.4

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

Projects by region

London was the main location of activity in the residential sector this month, accounting for 15.5% of the value of contracts awarded, a decrease of 11.8% from the same month last year (see Fig. 3.2 & 3.4). Contracts such as the City North Development in Finsbury Park and a major student refurbishment scheme by Goldsmiths University contribute to the London haul in October. However, in a sign that residential activity is increasing its geographical spread, the North West accounted for 14.6% of contract value. This an 8.1% increase from the same month in 2014 and the Oakfield Road project in Altrincham which is set to deliver 59 apartments and is valued at £70 million was the largest project awarded in October. This is perhaps indicative of the changing nature of residential schemes awarded outside of the London area.

Type of Projects

The type of projects awarded in the residential sector was dominated by private housing in October. Private housing accounted for 81% of the value of contracts awarded this month, a decrease of 2% from the corresponding month last year. After private housing, the next largest project type were hostels/halls of residence projects which accounted for 13% of the value awarded, an increase of 5% from the corresponding month last year (see Fig. 3.3).

PROJECT IN FOCUS

City North Development – Finsbury Park £120,000,000

County	London
Primary Category Sector	Residential
Government Region	London
Start Date	April 2016
End Date	April 2019
Contract Award Date	October 2015
Funding	Private
Stage	Contract
Contractor	Telford Homes Plc

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RESIDENTIAL UNITS RISE SLIGHTLY IN OCTOBER

TOP TEN Key Clients
Nov 2014 – Oct 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	220	2,586
2	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	159	2,426
3	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	152	2,273
4	Bellway Plc	Seaton Burn House, Dudley Lane, Seaton Burn, Newcastle Upon Tyne, Tyne And Wear, NE13 6BE	0191 217 0717 (CTPS)	87	1,034
5	Bovis Homes Limited (South East Region)	The Manor House, North Ash Road, New Ash Green, Longfield, Kent, DA3 8HQ	01474 872427 (CTPS)	60	914
6	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	71	785
7	Redrow Homes Limited	Redrow House, St David's Park, Deeside, Clwyd, CH5 3RX	01244 520044	62	753
8	Bloor Homes	Ashby Road, Measham, Swadlincote, Derbyshire, DE12 7JP	01530 270100	52	724
9	Countryside Properties (UK) Limited	Countryside House, The Drive, Great Warley, Brentwood, Essex, CM13 3AT	01277 260000	47	614
10	St Modwen Developments Plc	Park Point, 17 High Street, Longbridge, Birmingham, West Midlands, B31 2UQ	0121 222 9400	11	500

TOP TEN Key Architects
Nov 2014 – Oct 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	101	1,133
2	Stride Treglown Limited	Promenade House, The Promenade, Clifton Down, Bristol, North Somerset, BS8 3NE	0117 974 3271 (TPS)	20	783
3	RPS Group Plc	20 Western Avenue, Milton Park, Abingdon, Oxfordshire, OX14 4SH	01235 821888	33	545
4	Barton Willmore	The Blade, Abbey Square, Reading, Berkshire, RG1 3BE	0118 943 0000 (CTPS)	32	538
5	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	47	536
6	Squire and Partners	77 Wicklow Street, Westminster, London, WC1X 9JY	020 7278 5555 (TPS)	7	515
7	Stanton Williams	Diespecker Wharf, 36 Graham Street, Islington, London, N1 8GH	020 7880 6400	4	456
8	Woods Hardwick Limited	17 Goldington Road, Bedford, Bedfordshire, MK40 3NH	01234 268862	30	426
9	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	32	394
10	Patel Taylor Architects	48 Rawstorne Street, City, London, EC1V 7ND	020 7278 2323	4	372

TOP TEN Key Contractors
Nov 2014 – Oct 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	228	2,697
2	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	160	2,515
3	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	158	1,938
4	Bellway Plc	Seaton Burn House, Dudley Lane, Seaton Burn, Newcastle Upon Tyne, Tyne And Wear, NE13 6BE	0191 217 0717 (CTPS)	90	1,078
5	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	102	1,011
6	Redrow Homes Limited	Redrow House, St David's Park, Deeside, Clwyd, CH5 3RX	01244 520044	61	752
7	Bovis Homes Limited (South East Region)	The Manor House, North Ash Road, New Ash Green, Longfield, Kent, DA3 8HQ	01474 872427 (CTPS)	60	726
8	Bloor Homes	Ashby Road, Measham, Swadlincote, Derbyshire, DE12 7JP	01530 270100	52	708
9	Countryside Properties (UK) Limited	Countryside House, The Drive, Great Warley, Brentwood, Essex, CM13 3AT	01277 260000	51	689
10	Keepmoat Regeneration Limited	The Waterfront, Lakeside Boulevard, Doncaster, South Yorkshire, DN4 5PL	0161 876 6000	69	496

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 DECREASE SLIGHTLY IN OCTOBER

After September's record month infrastructure contract value dipped but renewable energy contracts are still increasing.

The value of contracts awarded in the infrastructure sector decreased slightly in October after a record month in September with the total value awarded £2.6 billion based on a three month rolling average (see Fig. 4.1). This is an 8% decrease from the previous month but is 110.2% higher than October 2014. In the three months to October the total value of contract awards was £7.1 billion based on a three month rolling average. This is 26.5% higher than the previous three months and 103% higher than the same period in 2014. This indicates a significant improvement on last year's performance and demonstrates the recovery within the sector in 2015.

Projects by region

Scotland dominated infrastructure contracts in October, accounting for 54.1% of the value awarded, a 43.4% increase on October 2014 (see Fig. 4.2 & 4.4). The Aberdeen to Inverness rail improvement contract was awarded with a construction value of £170 million. There were also a series of wind farm contracts awarded in Scotland which once again show the attractiveness of the country for developments of this kind.

> "The Aberdeen to Inverness rail improvement contract was awarded with a construction value of £170 million

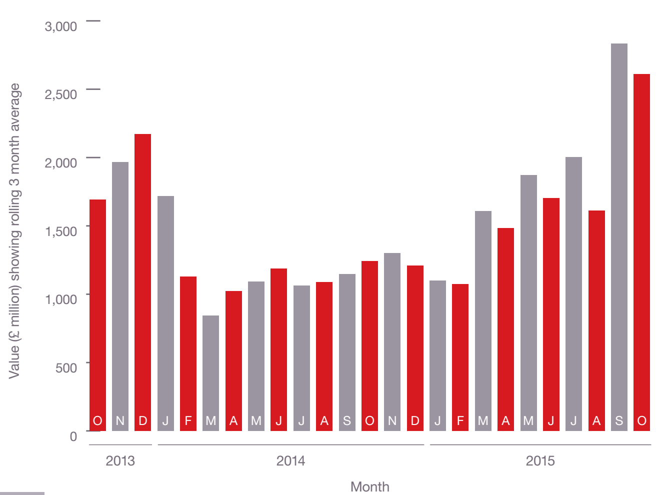

FIG. 4.1
Infrastructure: **Project Value showing 3 month moving average** Source: Barbour ABI

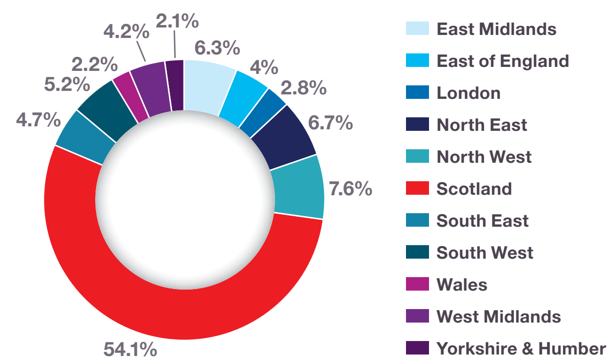

FIG. 4.2
Infrastructure: **Value of Contracts by Region** Source: Barbour ABI

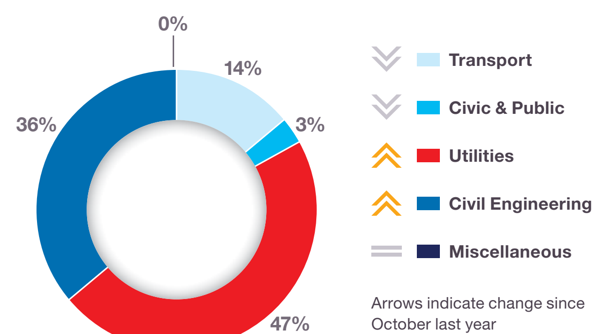

FIG. 4.3
Infrastructure: **Type of Projects Awarded** Source: Barbour ABI

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CONTRACT VALUES DECREASE SLIGHTLY IN OCTOBER

The map and figures show how the activity has changed since October 2014

		+43.4%	Scotland *HOTTEST REGION*
+3.6%	East Midlands	-6.4%	South East
-3.8%	East of England	-2.8%	South West
-41.9%	London	+1.1%	Wales
+6.3%	North East	+2.4%	West Midlands
+0.1%	North West	-2.1%	Yorkshire & Humber

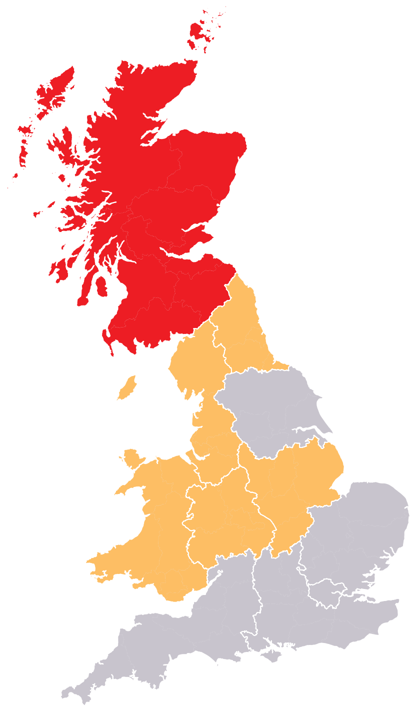

FIG. 4.4

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

Type of Projects

The wind farm contracts awarded this month mean that utilities is the sub sector with the highest share of contracts awarded. Utilities accounted for 47% of the value of contracts awarded in October, an increase of 22% from October 2014 (see Fig. 4.3). This is now the dominant sub-sector within infrastructure with both new orders and ONS output showing large increases in activity. The Aberdeen to Inverness rail programme largely accounts for the Civil Engineering sectors 36% of the contract value awarded in October.

Outlook

Indicative of the improving sentiment within the infrastructure was the increasing profit at engineering consultancy Atkins. Improvements in UK infrastructure resulted in a 38% increase in its half year profits and demonstrate the resurgence in the sector this year.

> "Utilities accounted for 47% of the value of contracts awarded in October, an increase of 22% from October 2014.

PROJECT IN FOCUS

Altens East Industrial Estate – Materials Recycling Facility £16,000,000

County	Grampian
Primary Category Sector	Infrastructure
Government Region	Scotland
Start Date	January 2016
End Date	January 2018
Contract Award Date	October 2015
Funding	Public
Stage	Contract
Contractor	Morrison Construction

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TOP TEN Key Clients

Nov 2014 – Oct 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Dong Energy Power (UK) Limited	City Point 33rd Floor, 1 Ropemaker Street, City, London, EC2Y	020 7811 5200	3	3,016
2	Highways England	123 Buckingham Palace Road, Westminster, London, SW1W 9HA	0845 955 6575	93	1,500
3	E.ON Limited	Newstead Court, Little Oak Drive, Annesley, Nottingham, Nottinghamshire, NG15 0DR	024 7618 1684	3	1,326
4	Thames Water Utilities Limited	Clearwater Court, Vastern Road, Reading, Berkshire, RG1 8DB	020 3577 8000	4	1,169
5	Transport for London	55 Broadway, Westminster, London, SW1 0BD	03432 220000	19	974
6	Welsh Assembly Government	Cathays Park, Cardiff, South Glamorgan, CF10 3NQ	0300 060 3300	4	820
7	Transport Scotland	Buchanan House, 58 Port Dundas Road, Glasgow, Strathclyde, G4 0HF	0141 272 7100	11	790
8	Green Energy Parks Limited	Eco Innovation Centre, Peterscourt, Peterborough, Cambridgeshire, PE1 1SA	01733 348468	1	600
9	Network Rail Infrastructure Limited	Kings Place, 90 York Way, Islington, London, N1 9AG	020 7557 8000	105	597
10	DONG Energy AVS	5 Howick Place, Westminster, London, SW1P 1WG	020 7811 5200	3	592

TOP TEN Key Architects

Nov 2014 – Oct 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	John Dickie Associates	Manor Barn, Wilsthorpe, Stamford, Lincolnshire, PE9 4PE	01778 560811	1	600
2	Atkins	Woodcote Grove, Ashley Road, Epsom, Surrey, KT18 5BW	01372 726140 (TPS)	12	598
3	Garry Stewart Design Associates	Highland House, Office 101 165 The Broadway, Wimbledon, London, SW19 1NE	020 8544 8085	1	200
4	WA Fairhurst & Partners	225 Bath Street, Glasgow, Strathclyde, G2 4GZ	0141 204 8800	2	154
5	RPS Group Plc	20 Western Avenue, Milton Park, Abingdon, Oxfordshire, OX14 4SH	01235 821888	3	152
6	UMC Architects	Newark Beacon Office Park, Cassereta Way, Nottingham, Nottinghamshire, NG24 2TN	01636 653027	2	151
7	BDP	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	2	129
8	Pascall & Watson Architects	5 Carlson Court, 116 Putney Bridge Road, Putney, London, SW15 2NQ	020 8874 1311 (TPS)	14	104
9	Acanthus LW Architects	Voysey House, Barley Mow Passage, Chiswick, London, W4 4PN	020 8994 2288	1	71
10	FOB Design	The Studio, 72a Water Lane, Wilmslow, Cheshire, SK9 5BB	01625 251644	1	60

TOP TEN Key Contractors

Nov 2014 – Oct 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	7	1,095
2	Vinci Construction UK Limited	Astral House, Imperial Way, Watford, Hertfordshire, WD24 4WW	01923 233433	25	923
3	Balfour Beatty Group Limited	130 Wilton Road, Westminster, London, SW1V 1LQ	020 7216 6800	47	893
4	Thales Transportation	The Quadrant, 4 Thomas More Square, Thomas More Street, City, London, E1W 1YW	020 3300 6000	4	760
5	Ferrovial Agroman, S.A.	Calle Ribera del Loira 42 Campo de las Naciones, Madrid, Spain, 28042	0034 91 300 85 43	1	746
6	BAM Nuttall	St James House, Knoll Road, Camberley, Surrey, GU15 3XW	01276 63484	23	671
7	Costain/Skanska JV	Vanwall Business Park, Vanwall Road, Maidenhead, Berkshire, SL6 4UB	01628 842444 / 01923 842444	2	600
8	KNM Group	15 Jalan Dagang SB4/1, Taman Sungai Besi Indah, 43300 Seri Kembangan, Malaysia	0060 389463000	1	600
9	Aberdeen Roads Limited	North Point, Exploration Drive, Bridge of Don, Aberdeen, Grampian, AB23 8GX	0800 058 8350	4	530
10	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	9	459

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

SLIGHT INCREASE IN CONTRACT VALUES

Contract values in the commercial & retail sector were higher in October but below the record month in August.

The value of contracts awarded in the commercial and retail sector was £903 million in October based on a three month rolling average (see Fig. 5.1). This is a 1% increase from September but a 28.1% decrease from the October 2014 figure. In the three months to October the value of contracts was 4.5% higher than the previous three months and 2.5% higher than the same period in 2014, indicating a modest increase in activity over the longer term.

Projects by region

London was the main location for commercial construction activity in October 2015 accounting for 44% of contract value, an 18.7% increase from October 2014 (see Fig. 5.2 & 5.4). Two major contracts awarded account for London's high share of total value. The International Quarter at the Olympic Park valued at £150 million and the retail development in Knightsbridge valued at £69 million are the two largest value projects awarded in the capital this month.

Type of Projects

The Olympic Park office contract also means that offices were the dominant type of project in the sector accounting for 79% of the value of contracts awarded this month, which is 11% higher than October 2014 (see Fig. 5.3).

> 1% increase from September but a 28.1% decrease from the October 2014 figure.

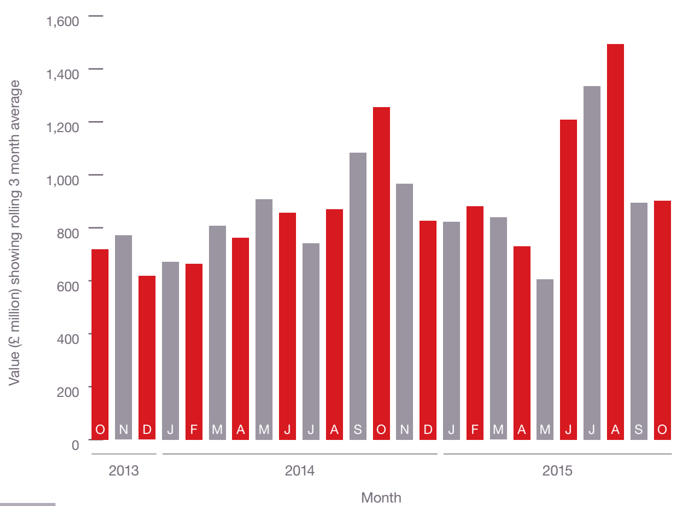

FIG. 5.1

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

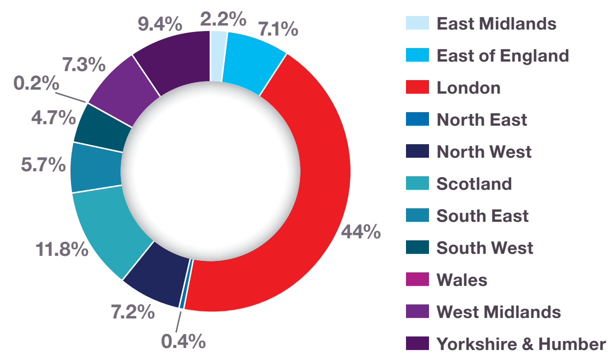

FIG. 5.2

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

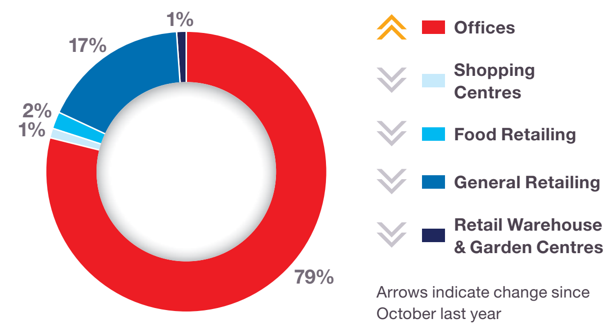

FIG. 5.3

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

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The map and figures show how the activity has changed since October 2014

		+3.6%	Scotland
-8.6%	East Midlands	-9.9%	South East
+4.4%	East of England	-9.3%	South West
+18.7%	London *HOTTEST REGION*	-0.7%	Wales
-0.3%	North East	-5.3%	West Midlands
+1.5%	North West	+5.8%	Yorkshire & Humber

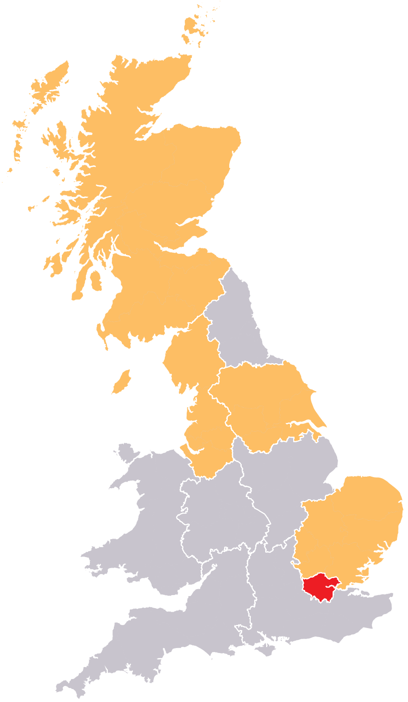
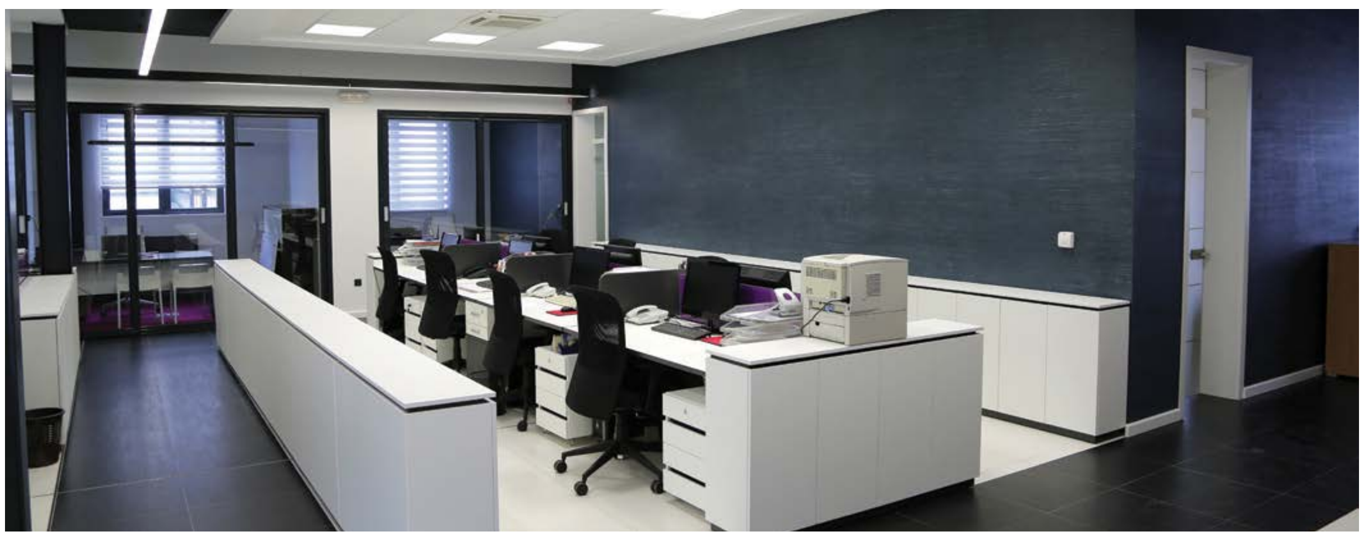


FIG. 5.4

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



PROJECT IN FOCUS

The International Quarter – Building S5
£150,000,000

County	London
Primary Category Sector	Commercial & Retail
Government Region	London
Start Date	September 2015
End Date	March 2017
Contract Award Date	October 2015
Funding	Private
Stage	Subcontract
Contractor	Lendlease Limited

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SLIGHT INCREASE IN CONTRACT VALUES

TOP TEN Key Clients
Nov 2014 – Oct 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	The Crown Estate	16 New Burlington Place, Westminster, London, W1S 2HX	020 7851 5000 (CTPS)	3	449
2	British Waterways	Brindley Suite, Willow Grange, Church Road, Watford, Hertfordshire, WD17 4QA	01923 226422	1	388
3	Britel Fund Trustees Limited And Clerical Medical	Lloyd Chambers, 1 Portsoken Street, Tower Hamlets, London, E1 8PP	020 7702 0888	1	250
4	Stanhope Plc	Norfolk House, 31 St James Square, Westminster, London, SW1Y 4JR	020 7170 1700	2	246
5	Land Securities Group	5 The Strand, Westminster, London, WC2N 5HR	020 7413 9000 (CTPS)	3	232
6	Lendlease Limited	20 Triton Street, Regent's Place, Camden Town, London, NW1 3BF	020 7182 9000	4	216
7	Canary Wharf Group PLC	1 Canada Square, Canary Wharf, Poplar, London, E14 5AB	020 7418 2000	2	201
8	Saxon Land BV	117 Fenchurch Street, City, London, EC3M 5DY	020 7410 7300	1	150
9	West London & Suburban Property Investments Limited	25 Savile Row, City, London, W1S 2ER	Not Listed	1	125
10	Argent Group Plc	4 Stable Street, King's Cross, Camden, London, N1C 4AB	020 3664 0200 (TPS)	3	122

TOP TEN Key Architects
Nov 2014 – Oct 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Glenn Howells Architects	321 Bradford Street, Digbeth, Birmingham, West Midlands, B5 6ET	0121 666 7640 (CTPS)	4	729
2	BDP	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	9	724
3	Dixon Jones Limited	2-3 Hanover Yard, Noel Yard, Islington, London, N1 8YA	020 7483 8888	2	509
4	Allies & Morrison Urban Practitioners	85 Southwark Street, Southwark, London, SE1 0HX	020 7921 0100	1	440
5	Panter Hudspith Architects	4-8 Emerson Street, Southwark, London, SE1 9DU	020 7633 9425	1	440
6	Pelli Clark Pelli Architects	1056 Chapel Street, New Haven, Connecticut, CT06510	00 1203 777 2515	1	388
7	Allford Hall Monaghan Morris	4 & 5th Floors, Block C, Morelands, 5-23 Old Street, City, London, EC1V 9HL	020 7251 5261	5	376
8	Eric Parry Architects	28-42 Banner Street, City, London, EC1Y 8QE	020 7608 9600	4	326
9	Make Architects	13 Fitzroy Street, Westminster, London, W1T 4BQ	020 7636 5151	4	307
10	TP Bennett LLP	One America Street, Southwark, London, SE1 0NE	020 7208 2000	16	283

TOP TEN Key Contractors
Nov 2014 – Oct 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Mace Limited	155 Moorgate, City, London, EC2M 6XB	020 3522 3000 (TPS)	17	629
2	Canary Wharf Group PLC	1 Canada Square, Canary Wharf, Poplar, London, E14 5AB	020 7418 2000	2	588
3	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	4	573
4	BAM Construction	Breakspear Park, Breakspear Way, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	12	302
5	McAlpine Limited	Eaton Court, Maylands Avenue, Hemel Hempstead, Hertfordshire, HP2 7TR	01442 233444	8	299
6	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	31	277
7	McLaren Construction Limited	McLaren House, 100 Kings Road, Brentwood, Essex, CM14 4EA	01277 205800	12	267
8	ISG	Aldgate House, 33 Aldgate High Street, City, London, EC3N 1AG	020 7247 1717	35	246
9	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111 (CTPS)	12	245
10	Lendlease Limited	20 Triton Street, Regent's Place, Camden Town, London, NW1 3BF	020 7182 9000	4	216

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

SLIGHT DECREASE IN CONTRACT VALUE IN OCTOBER

The hotel, leisure & sport sector showed monthly decreases in contract values and there are declines over the longer term indicating a subdued 2015.

Contract award levels in the hotel, leisure & sport sector were £195 million in October, based on a three month rolling average (see Fig. 6.1). This was 22.8% lower than September and 63% lower than October 2014. In the three months to October the value of contracts was £720 million, which was 28.5% lower than the previous three months. This was a decrease of 45.4% compared to the same period in 2014 indicating longer term decline over the past year.

Projects by region

The East of England had the highest share of the hotel, leisure & sport sector contracts accounting for 20.9% of value awarded, a 19.4% increase from October 2014 (see Fig. 6.2 & 6.4). Irish Hotel group O'Callaghan's contract to develop a 169 bedroom hotel in Cambridge was the largest project in October with a value of £15 million.

Type of Projects

A series of leisure contracts across the country mean that leisure centres dominated the sector accounting for 45% of overall levels of contracts awarded, a 34% increase from 2014. Hotels/motels were next with 30% of the value awarded, an 18% increase from October 2014 (see Fig, 6.3).

> Value of contracts was £720 million, which was 28.5% lower than the previous three months.

FIG. 6.1

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

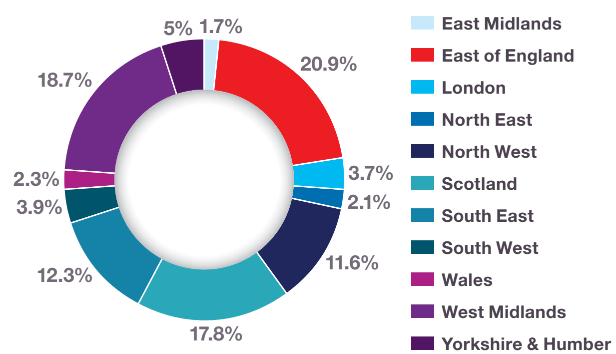

FIG. 6.2

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

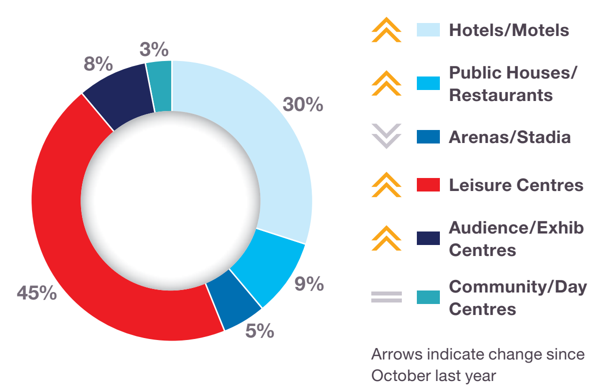

FIG. 6.3

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

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SLIGHT DECREASE IN CONTRACT VALUE IN OCTOBER

The map and figures show how the activity has changed since October 2014			+9.8%	Scotland
+1.1%	East Midlands		+10.6%	South East
+19.4%	East of England *HOTTEST REGION*		+0.1%	South West
-27.3%	London		-41.5%	Wales
-0.7%	North East		+14.7%	West Midlands
+9.4%	North West		+4.4%	Yorkshire & Humber

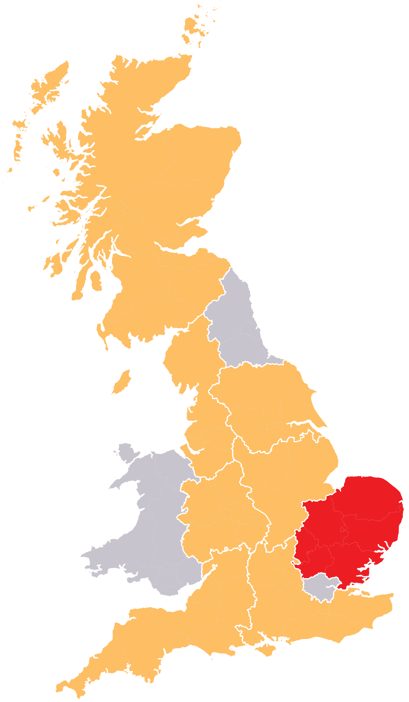

FIG. 6.4

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

> Leisure centres dominated the sector accounting for 45% of overall levels of contracts awarded.

PROJECT IN FOCUS

O'Callaghan Hotel
£15,000,000

County	Cambridgeshire
Primary Category Sector	Hotel, Leisure & Sport
Government Region	East Midlands
Start Date	June 2015
End Date	October 2016
Contract Award Date	October 2015
Funding	Private
Stage	Subcontract
Contractor	John Paul Construction

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SLIGHT DECREASE IN CONTRACT VALUE IN OCTOBER

TOP TEN Key Clients
Nov 2014 – Oct 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Radisson Edwardian Hotels Limited	140 Bath Road, Hayes, Middlesex, UB3 5AW	020 8759 6311	2	150
2	The Berkeley Group Plc / St James Group	Berkeley House, 19 Portsmouth Road, Cobham, Surrey, KT11 1JG	020 3675 1502	2	142
3	Whitbread PLC	Whitbread Court, Houghton Hall Business Court, Porz Avenue, Dunstable, Bedfordshire, LU5 5XE	01582 499499	40	112
4	Galliard Construction Limited	Sterling House, Langston Road, Loughton, Essex, IG10 3TS	020 8418 1000	2	104
5	The Casey Group Limited	Rydings Road, Wardle, Rochdale, Lancashire, OL12 9PS	01706 341121	1	100
6	4C Hotels	13 Wadham Gardens, City, London, NW3 3DN	020 7419 1839	1	60
7	Manhattan Loft Corporation Limited	223-231 Old Marylebone Road, Edison House, City, London, NW1 5QT	020 7535 2222	1	50
8	Timec 1209 Llp	Time Central, Gallowgate, Newcastle Upon Tyne, Tyne And Wear, NE1 4BF	Not Listed	1	45
9	Art'otel	c/o Park Plaza, Germany Holdings GmbH, Markisches Ufer 12, D-10179, Berlin, Germany	+49 (0)30 400 557 0	1	40
10	City of York Council	Library Square, York, North Yorkshire, YO1 7DS	01904 551550	2	37

TOP TEN Key Architects
Nov 2014 – Oct 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Woods Bagot	46-48 Foley Street, Westminster, London, W1W 7TY	020 7637 6880 (CTPS)	1	150
2	Ian Simpson Architects	5-8 Roberts Place, City, London, EC1R 0BB	020 7549 4000 (CTPS)	1	140
3	EPR Architects	21 Douglas Street, Barnet, London, SW1P4PE	020 7834 4411	3	131
4	Axiom Architects	Brooklands Yard, Southover High Street, Lewes, East Sussex, BN7 1HU	01273 479269 (TPS)	33	107
5	Dexter Moren Associates	57d Jamestown Road, Camden Town, London, NW1 7DB	020 7267 4440	6	97
6	Leach Rhodes & Walker LLP	West Riverside, New Bailey Street, Manchester, Greater Manchester, M3 5AA	0161 833 0211	4	75
7	3D Reid (Architects) Limited	45 West Nile Street, Glasgow, Strathclyde, G1 2PT	0345 271 6350	10	69
8	Holmes Miller	89 Minerva Street, Glasgow, Strathclyde, G3 8LE	0141 204 2080	3	59
9	Donald Insall & Associates Limited	19 West Eaton Place, Eaton Square, Westminster, London, SW1X 8LT	020 7245 9888 (TPS)	2	54
10	Allford Hall Monaghan Morris	4 & 5th Floors, Block C, Morelands, 5-23 Old Street, City, London, EC1V 9HL	020 7251 5261	3	53

TOP TEN Key Contractors
Nov 2014 – Oct 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	ISG	Aldgate House, 33 Aldgate High Street, City, London, EC3N 1AG	020 7247 1717	17	143
2	Brookfield Multiplex Construction Europe Limited	One Broadgate, 1st Floor, City, London, EC2M 2QS	020 3829 2500	1	140
3	Bay Construct Limited	64 Clerkenwell Road, Islington, London, EC1M 5PX	0203 714 7390	3	108
4	The Casey Group Limited	Rydings Road, Wardle, Rochdale, Lancashire, OL12 9PS	01706 341121	1	100
5	HOC UK Limited	Jubilee House, Townsend Lane, City, London, NW9 8TZ	020 8200 5873	3	74
6	McAleer & Rushe Limited	17-19 Dungannon Road, Cookstown, County Tyrone, BT80 8TL	028 8676 3741 (CTPS)	5	72
7	Bouygues UK Limited	Elizabeth House, 39 York Road, Southwark, London, SE1 7NQ	020 7401 0020	3	65
8	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852 (CTPS)	8	59
9	RG Carter Limited	9-11 Drayton High Road, Drayton, Norwich, Norfolk, NR8 6AH	01603 867355	10	59
10	Bowmer & Kirkland Limited	High Edge Court, Heage, Belper, Derbyshire, DE56 2BW	01773 853131	7	57

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INDUSTRIAL

ACTIVITY INCREASES IN THE SECTOR THIS MONTH

The industrial sector experienced an increase in contract values awarded in October and the value of work is still significantly higher than the same time in 2014.

Activity in the industrial sector increased slightly in October with the value of contracts awarded £557 million, based on a three month rolling average (see Fig. 7.1). This equates to an increase of 3.7% on the value in September but is 82.3% above the figure recorded this time last year. In the three months to October the total value of contracts was £1.8 billion which was 5% lower than the previous three months but 80.4% higher than the same quarter last year. This indicates the comparatively strong performance the sector has been experiencing over the longer term.

Projects by region

The West Midlands is the region with the highest proportion of contracts recording 21.4% of the value of contracts awarded, which was a 14% increase from October 2014 (see Fig. 7.2 & 7.4). An expansion at the Jaguar Land Rover factory near Wolverhampton, which has an estimated value of £80 million was the largest project awarded in the region in October. The East of England had the next highest proportion of activity, accounting for 18.4% of contract award value, an increase of 10.6% on the corresponding month last year. The award of the contract to construct a coffee roasting facility for Costa Coffee in Basildon, valued at £36 million was the major contributor to the contract value in the region in October.

> Value of contracts was £1.8 billion which was 5% lower than the previous three months.

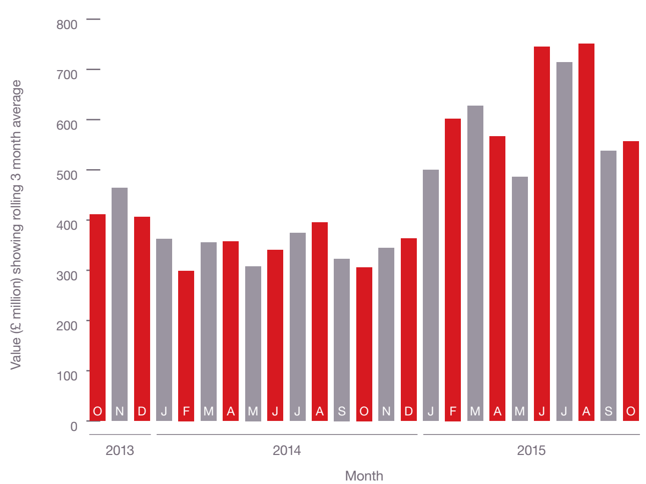

FIG. 7.1
Industrial: **Project Value showing 3 month moving average** Source: Barbour ABI

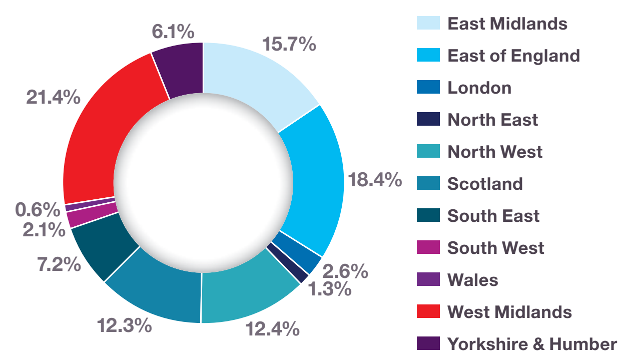

FIG. 7.2
Industrial: **Value of Contracts by Region** Source: Barbour ABI

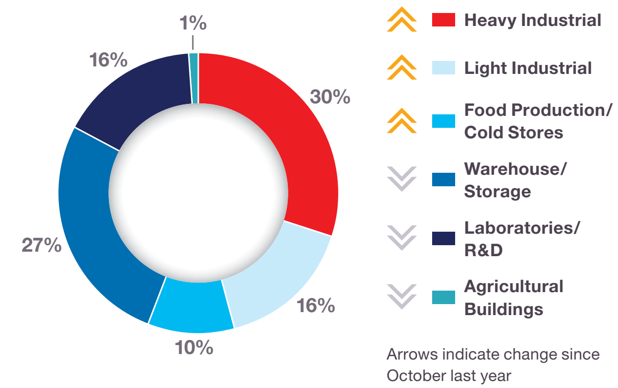

FIG. 7.3
Industrial: **Type of Projects Awarded** Source: Barbour ABI

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The map and figures show how the activity has changed since October 2014

+6.9%	East Midlands	+7.2%	Scotland
+10.6%	East of England	-23.2%	South East
+2.6%	London	-13.9%	South West
+0.2%	North East	-1.4%	Wales
-0.9%	North West	+14.0%	West Midlands *HOTTEST REGION*
		-2.1%	Yorkshire & Humber

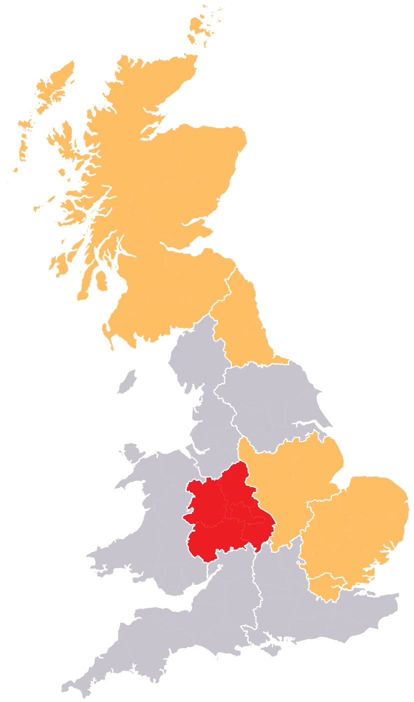

FIG. 7.4

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

Type of Projects

The types of project awarded in the sector were predominantly heavy industrial which accounted for 30% of contract values, an increase of 13% from October 2014. Warehouse/storage projects had the second highest proportion of contracts by value in October accounting for 27% of contract value, a decrease of 13% from the same month in the previous year (see Fig. 7.3).

> “Projects awarded were predominantly heavy industrial which accounted for 30% of contract values.

PROJECT IN FOCUS

Cell Therapy Catapult – Cell Therapy Manufacturing Centre £26,000,000

County	Hertfordshire
Primary Category Sector	Industrial
Government Region	East of England
Start Date	September 2015
End Date	May 2017
Contract Award Date	October 2015
Funding	Private
Stage	Contract
Contractor	M & W UK

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ACTIVITY INCREASES IN THE SECTOR THIS MONTH

TOP TEN Key Clients
Nov 2014 – Oct 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	BP Exploration	Farburn Industrial Estate, Aberdeen, Grampian, AB21 7PB	01224 832000	1	500
2	BAE Systems Marine Limited	Bridge Road, Barrow in Furness, Cumbria, LA14 1AF	01229 823366	4	395
3	AstraZeneca	2 Kingdom Street, City, London, W2 6BD	020 7604 8000	1	300
4	Aldi Stores Limited	Holly Lane, Atherstone, Warwickshire, CV9 2SQ	01827 711800	3	200
5	Goodman International	Nelson House, Central Boulevard, Blythe Valley Park, Solihull, West Midlands, B90 8BG	0121 506 8100	9	193
6	The Peel Group	Peel Management, Peel Dome, The Trafford Centre, Manchester, Greater Manchester, M17 8PL	0161 629 8200	4	155
7	The London Taxi Company	Holyhead Road, Coventry, West Midlands, CV5 8JJ	024 7657 2000	1	150
8	Sellafield Limited	Hinton House, Birchwood Park Avenue, Warrington, Cheshire, WA3 6GR	01925 832000	1	150
9	Ministry of Defence	Whitehall, Westminster, London, SW1A 2HB	020 7218 9000	5	131
10	West Berkshire Council	Council Offices, Market Street, Newbury, Berkshire, RG14 5LD	01635 424000	1	125

TOP TEN Key Architects
Nov 2014 – Oct 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	BDP	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	1	300
2	Herzog & de Meuron UK Limited	65 Clerkenwell Road, City, London, EC1R 5BL	020 7025 2960	1	300
3	UMC Architects	Newark Beacon Office Park, Cassereta Way, Nottingham, Nottinghamshire, NG24 2TN	01636 653027	13	257
4	RPS Group Plc	20 Western Avenue, Milton Park, Abingdon, Oxfordshire, OX14 4SH	01235 821888	9	229
5	STOAS Architects	216 Fort Dunlop, Fort Parkway, Birmingham, West Midlands, B24 9FD	0121 747 1943	3	200
6	Stephen George & Partners	170 London Road, Leicester, Leicestershire, LE2 1ND	0116 247 0557	15	178
7	BHP Design LLP	Suite 2f, St Georges Court, 1 Albion Street, Birmingham, West Midlands, B1 3AH	0121 314 6618	1	150
8	PHP Architects	The Old Rectory, 31 Rectory Lane, Milton Malsor, Northampton, Northamptonshire, NN7 3AQ	01604 858916	7	150
9	Michael Sparks Associates	11 Plato Place, St Dionis Road, Fulham, London, SW6 4TU	020 7736 6162	12	149
10	AJA Architects LLP	1170 Elliot Court, Herald Avenue, Coventry Business Park, Coventry, West Midlands, CV5 6UB	024 7625 3200	15	147

TOP TEN Key Contractors
Nov 2014 – Oct 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Winvic Construction	19 Tenter Road, Moulton Park, Northampton, Northamptonshire, NN3 6PZ	01604 678960 (CTPS)	21	563
2	Petrofac	Bridge View, 1 North Esplanade West, Aberdeen, Aberdeenshire, AB11 5QF	01224 247000 (TPS)	1	500
3	Skanska UK	Maple Cross House, Denham Way, Maple Cross, Rickmansworth, Hertfordshire, WD3 9SW	01923 776666	2	400
4	McLaren Construction Limited	McLaren House, 100 Kings Road, Brentwood, Essex, CM14 4EA	01277 205800	10	225
5	Bowmer & Kirkland Limited	High Edge Court, Heage, Belper, Derbyshire, DE56 2BW	01773 853131	7	215
6	M & W UK	Unit A2, Metheun South, Bath Road, Chippenham, Wiltshire, SN14 0GT	01249 455150	2	176
7	Buckingham Group Contracting Limited	Blackpit Farm, Silverstone Road, Stowe, Buckingham, Buckinghamshire, MK18 5LJ	01280 823355	10	155
8	STOAS Architects	216 Fort Dunlop, Fort Parkway, Birmingham, West Midlands, B24 9FD	0121 747 1943	2	150
9	McAlpine Limited	Eaton Court, Maylands Avenue, Hemel Hempstead, Hertfordshire, HP2 7TR	01442 233444	5	143
10	St Modwen	Park Point, 17 High Street, Longbridge, Birmingham, West Midlands, B31 2UQ	0121 647 1000	1	125

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 OF CONTRACTS IN OCTOBER

The monthly value of medical & health contracts increased in October but were below the values for October 2014.

Levels of activity in the medical & health sector increased 11.2% in October 2015 compared to September, with the total value of contracts awarded being £178 million based on a three month rolling average (see Fig. 8.1). This is 25.5% lower than the values in October 2014. In the three months to October the value of contracts increased by 3.2% on the previous three months, but was 14.3% lower than the same period in 2014 indicating a longer term decrease in the value of contracts awarded in the sector.

Projects by region

East Midlands was the main location of development in the sector this month capturing 41.9% of activity, an increase of 36.2% from October 2014 (see Fig. 8.2 & 8.4). One project in particular contributes to the East Midlands strong share of contracts in October. A contract to construct the Greenacre Care Village in Worksop which will cost £50 million was the major project awarded. Scotland also had a strong month accounting for 28.4% of contracts awarded, a 26.8% increase from October 2014. The contract to construct a community hospital in Haddington, East Lothian valued at £32 million was the largest value contract awarded in Scotland in October.

> "In the three months to October the value of contracts increased by 3.2% on the previous three months

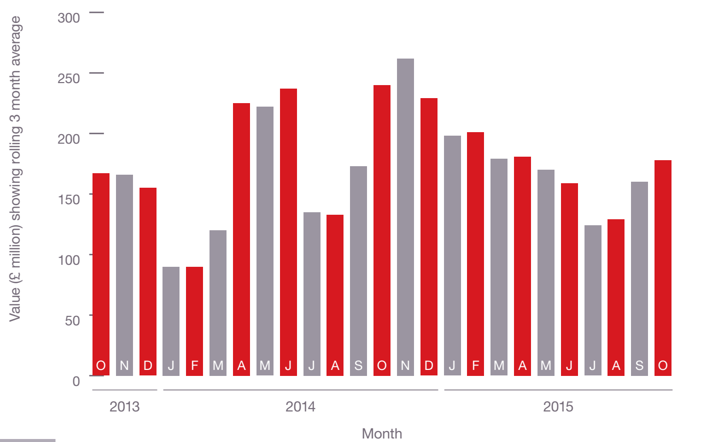


FIG. 8.1

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

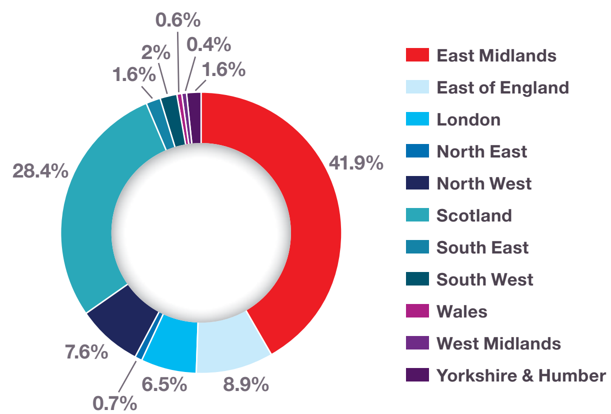
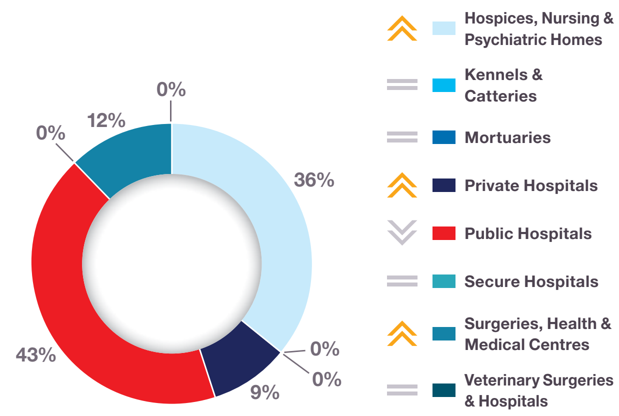


FIG. 8.2

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



Arrows indicate change since October last year

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 2014

+36.2%	East Midlands *HOTTEST REGION*	+26.8%	Scotland
-44.9%	East of England	-15.0%	South East
+0.9%	London	-0.6%	South West
+0.7%	North East	-0.3%	Wales
+5.7%	North West	-9.4%	West Midlands
		+0.1%	Yorkshire & Humber

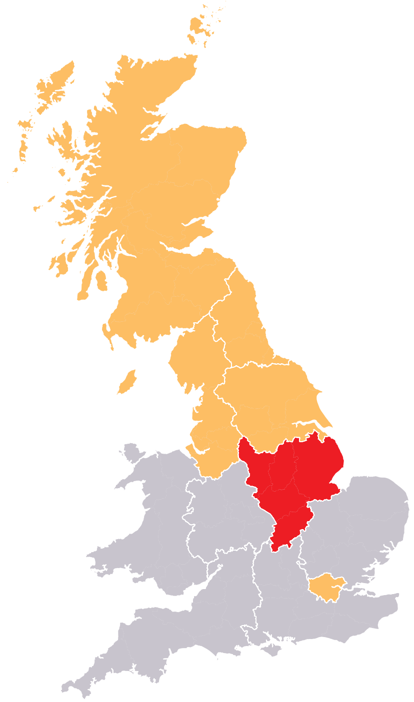

FIG. 8.4

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

Type of Projects

Public hospitals dominated the sector this month, accounting for 43% of overall contracts awarded. This was followed by hospices, nursing and psychiatric homes with the projects mentioned above the main reasons for this split (see Fig. 8.3).

> East Midlands was the main location of development in the sector this month capturing 41.9% of activity

PROJECT IN FOCUS

www.chesterfield.co.uk

Chesterfield Royal Hospital – Macmillan Cancer Centre
£9,000,000

County	Derbyshire
Primary Category Sector	Medical & Health
Government Region	East Midlands
Start Date	October 2015
End Date	October 2016
Contract Award Date	October 2015
Funding	Public
Stage	Contract
Contractor	Vinci Construction

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TOP TEN Key Clients

Nov 2014 – Oct 2015

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	6	214
2	Ministry of Defence	Whitehall, Westminster, London, SW1A 2HB	020 7218 9000	2	208
3	BS Stanford Limited	70 Grosvenor Street, Westminster, London, W1K 3JP	Not Listed	1	200
4	Aneurin Bevan Health Board	Mamhilad House, Block A, Mamhilad Park Estate, Pontypool, Gwent, NP4 0YP	01873 732732 (CTPS)	1	180
5	Royal Infirmary of Edinburgh NHS Trust	51 Little France Crescent, Old Dalkeith Road, Edinburgh, Lothian, EH16 4SA	0131 536 1000 (CTPS)	1	150
6	NHS Lothian	Royal Edinburgh Hospital, Morningside Place, Edinburgh, Lothian, EH10 5HF	0131 537 6000 (CTPS)	3	104
7	Spire Healthcare Limited	PO Box 62647, 120 Holborn, City, London, EC1P 1JH	0800 169 1777	3	88
8	Birmingham Women's NHS Foundation Trust	Metchley Park Road, Edgbaston, Birmingham, West Midlands, B15 2TG	0121 472 1377	1	75
9	University of Glasgow	Gilbert Scott Building, University Avenue, Glasgow, Strathclyde, G12 8QQ	0141 330 2000 (TPS)	1	64
10	The Clatterbridge Cancer Centre NHS Foundation Trust	Clatterbridge Hospital, Clatterbridge Road Bebington, Wirral, Merseyside, CH63 4JD	0151 334 4000	1	62

TOP TEN Key Architects

Nov 2014 – Oct 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	BDP	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	3	313
2	John Simpson & Partners	29 Great James Street, Holborn, Westminster, London, WC1N 3EY	020 7405 1285 (TPS)	1	200
3	Steffian Bradley Architects	45 Gee Street, Fifth Floor, City, London, EC1V 3RS	020 7549 4050	1	200
4	HLM Architects	46 Loman Street, Southwark, London, SE1 0EH	020 7921 4800	1	150
5	IBI Group	Princes Manor Barn, Reading Road, Harwell, Oxford, Oxfordshire, OX11 0LU	01235 820222 (TPS)	11	124
6	Halliday Meecham Partnership	111 Piccadilly, Manchester, Greater Manchester, M1 2HY	0161 661 5566	2	81
7	AFLS & P Architects Limited	The Cornerhouse, 91-93 Farringdon Road, City, London, EC1M 3LN	020 7831 8877	3	78
8	Gilling Dod Architects	The Cruck Barn, Duxbury Park, Chorley, Lancashire, PR7 4AT	01257 260070	8	70
9	Murphy Philipps Architects Limited	140 Old Street, City, London, EC1V 9BJ	020 7490 8008	6	66
10	Boswell Mitchell & Johnston	The Hub, 70 Pacific Quay, Glasgow, Strathclyde, G51 1DZ	0141 271 3200	1	64

TOP TEN Key Contractors

Nov 2014 – Oct 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	7	398
2	Interserve Plc	Interserve House, Ruscombe Park, Twyford, Reading, Berkshire, RG10 9JU	0118 932 0123 (CTPS)	22	300
3	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111 (CTPS)	20	259
4	Brookfield Multiplex Construction Europe Limited	One Broadgate, 1st Floor, City, London, EC2M 2QS	020 3829 2500	6	164
5	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852 (CTPS)	10	117
6	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	6	104
7	BAM Construction	Breakspear Park, Breakspear Way, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	3	101
8	Vinci Construction UK Limited	Astral House, Imperial Way, Watford, Hertfordshire, WD24 4WW	01923 233433	5	82
9	Redwall Developments Limited	Suite 2, 10 Redwall House, Waterside Business Park, Rotherham Road, Dinningham, Sheffield, South Yorkshire, S25 3QA	01909 517737	1	50
10	Bouygues UK Limited	Elizabeth House, 39 York Road, Southwark, London, SE1 7NQ	020 7401 0020	1	45

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

SLIGHT DECREASE IN THE VALUE OF CONTRACTS

Contract values in the education sector decreased in October and activity is lower than this time last year indicating a slight decline in the longer term performance in this sector.

The value of contracts awarded in the education sector was £669 million in October based on a three month rolling average, a 4.7% decrease from September (see Fig. 9.1). This figure was 7.1% lower than October 2014 indicating a decrease in activity compared to the same time last year. The values of contract awards in the three months to October were 10.2% higher than the previous three months, but 8.5% below the figure in the corresponding period in 2014.

Projects by region

London accounted for the largest proportion of works awarded in October, with 24.2% of the overall total, albeit a 4.8% decrease from October 2014 (see Fig.9.2 & 9.4). The University sector provided the main high value projects in the region with both UCL and Greenwich University investing in new buildings at a construction value of £25 million each.

The North West accounted for the second largest proportion of contracts awarded in October, with 13.5% of the value awarded. This was a 7.6% increase on the equivalent month in 2014. A £40 million development of the Manchester University Business School was the major project awarded this month.

> “ The University sector provided the main high value projects in the region

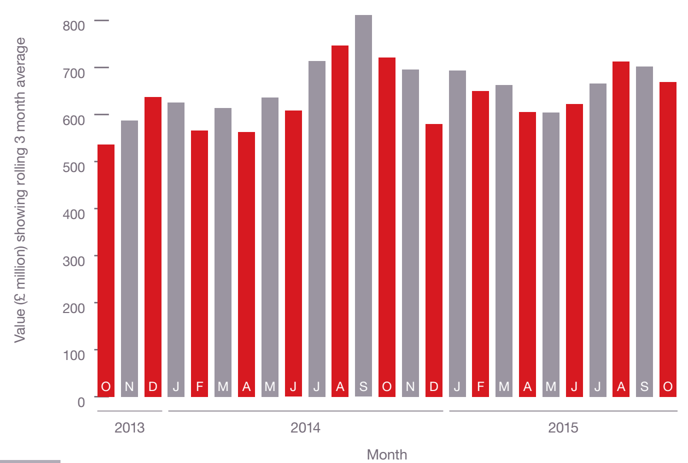

FIG. 9.1

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

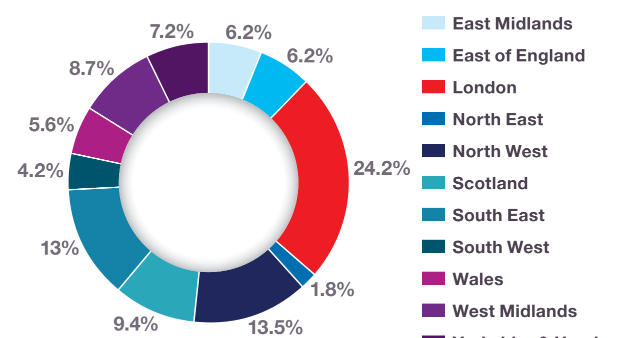

FIG. 9.2

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

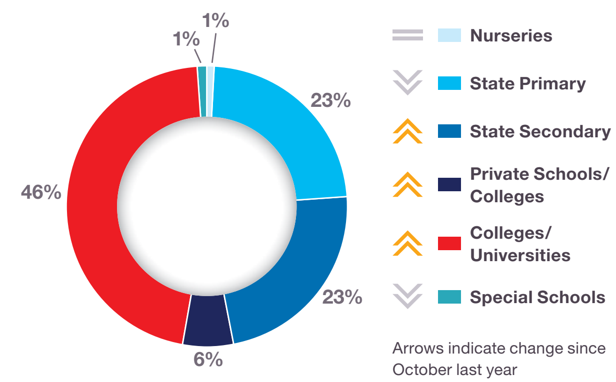

FIG. 9.3

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

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SLIGHT DECREASE IN THE VALUE OF CONTRACTS

The map and figures show how the activity has changed since October 2014

		+4.5%	Scotland
+4.8%	East Midlands	-10.2%	South East
-8.0%	East of England	-3.8%	South West
-4.8%	London	+4.4%	Wales
-3.8%	North East	+7.2%	West Midlands
+7.6%	North West *HOTTEST REGION*	+2.2%	Yorkshire & Humber

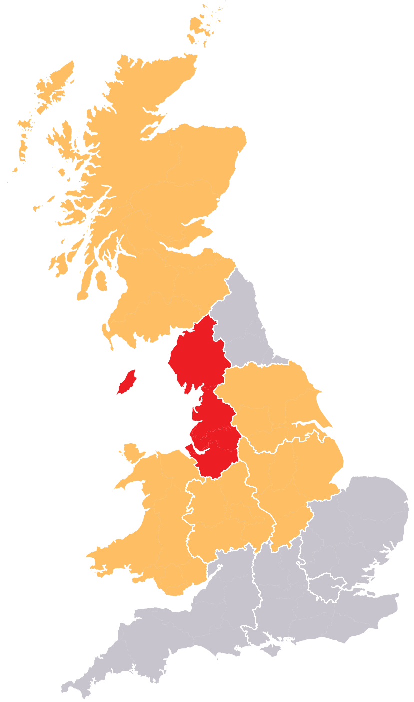

FIG. 9.4

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

Source: Barbour ABI

Type of Projects

Colleges/universities were the sub sector with the largest proportion of contracts in October 2015 accounting for 46% of total value awarded. State primary and secondary followed, contributing 23% each of the overall value of contracts awarded (see Fig. 9.3).

> London accounted for the largest proportion of works awarded in October, with 24.2% of the overall total

PROJECT IN FOCUS

www.alumni.mbs.ac.uk

Manchester Business School Redevelopment – Phase 2
£40,000,000

County	Greater Manchester
Primary Category Sector	Education
Government Region	North West
Start Date	January 2015
End Date	January 2019
Contract Award Date	October 2015
Funding	Private
Stage	Contract
Contractor	Mace

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SLIGHT DECREASE IN THE VALUE OF CONTRACTS

TOP TEN Key Clients
Nov 2014 – Oct 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	The Department For Education	Castle View House, East Lane, Runcorn, Cheshire, WA7 2AA	0370 000 2288	83	895
2	The University of Manchester	Oxford Road, Manchester, Greater Manchester, M13 9PL	0161 306 6000	12	295
3	Imperial College London	Estates Division, South Kensington Campus, Exhibition Road, South Kensington, London, SW7 2DB	020 7589 5111 (CTPS)	2	151
4	London School of Economics and Political Science	Houghton Street, Westminster, London, WC2A 2AE	020 7405 7686	9	130
5	University College London	Gower Street, Westminster, London, WC1E 6BT	020 7679 2000 (CTPS)	13	110
6	Milton Keynes Council	Civic Offices, 1 Saxon Gate East, Milton Keynes, Buckinghamshire, MK9 3EJ	01908 691691	10	102
7	University of Edinburgh	The Old College, South Bridge, Edinburgh, Lothian, EH8 9YL	0131 650 1000	11	100
8	University of Oxford	The Malthouse, Tidmarsh Lane, Oxford, Oxfordshire, OX1 1NQ	01865 270000 (CTPS)	7	100
9	Dumfries & Galloway Council	Militia House, English Street, Dumfries, Dumfries and Galloway, DG1 2HR	0303 333 3000	7	86
10	University of Leeds	Woodhouse Lane, Leeds, West Yorkshire, LS2 9JT	0113 243 1751	12	82

TOP TEN Key Architects
Nov 2014 – Oct 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Atkins	Woodcote Grove, Ashley Road, Epsom, Surrey, KT18 5BW	01372 726140 (TPS)	31	294
2	Penoyre & Prasad Architects	28-42 Banner Street, City, London, EC1Y 8QE	020 7250 3477	2	232
3	Mecanoo Architecten	Oude Delft 203, 2611 HD Delft, Holland	+31 15 2798100	1	225
4	Stride Treglown Limited	Promenade House, The Promenade, Clifton Down, Bristol, North Somerset, BS8 3NE	0117 974 3271 (TPS)	21	186
5	BDP	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	14	169
6	The Bond Bryan Partnership	The Congregational Church, The Church Studio, Springvale Road, Sheffield, South Yorkshire, S10 1LP	0114 266 2040 (TPS)	24	169
7	Ryder Architecture	Cooper Studios, 14-18 Westgate Road, Newcastle Upon Tyne, Tyne And Wear, NE1 3NN	0191 269 5454	15	167
8	PLP Architecture	2 Seething Lane, City, London, EC3N 4AT	020 3006 3900	1	150
9	Aukett Swanke	25 Christopher Street, City, London, EC2A 2BS	020 7454 8200	1	150
10	Hawkins Brown Architects	159 St John Street, City, London, EC1V 4QJ	020 7336 8030	16	150

TOP TEN Key Contractors
Nov 2014 – Oct 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111 (CTPS)	94	584
2	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852 (CTPS)	57	495
3	BAM Construction	Breakspear Park, Breakspear Way, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	40	444
4	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	62	437
5	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	75	383
6	Interserve Plc	Interserve House, Ruscombe Park, Twyford, Reading, Berkshire, RG10 9JU	0118 932 0123 (CTPS)	43	378
7	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	15	367
8	Balfour Beatty Group Limited	130 Wilton Road, Westminster, London, SW1V 1LQ	020 7216 6800	15	314
9	Mace Limited	155 Moorgate, City, London, EC2M 6XB	020 3522 3000 (TPS)	12	310
10	Carillion Plc	Carillion House, 84 Salop Street, Wolverhampton, West Midlands, WV3 0SR	01902 422431	28	190

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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