

March 2026

# Skills Analysis in Construction to Support Housing Delivery

## Report

Nick Fenton, Chair – SE HDG

Brian Horton, Strategic Housing Advisor – SE HDG

Amani Horton, Associate Consultant – SE HDG



## Contents

<b>1. Executive Summary</b>	<b>3</b>
<b>2. Market Context</b>	<b>6</b>
<b>3. Core Delivery Barriers: Evidence from our Survey and Roundtables</b>	<b>7</b>
3.1 Structural and Financial Constraints	
3.2 Regulatory and Compliance Pressures	
3.3 Skills Shortages	
3.4 Future Workforce Capacity	
3.5 Occupational Pressure Points	
3.6 Workforce Pressures	
<b>4. Skills Shortages Across the Workforce</b>	<b>14</b>
4.1 Pre-construction and Design	
4.2 Site and Construction	
4.3 Building Services and Low Carbon	
4.4 Compliance and Quality	
<b>5. Modern Methods of Construction (MMC): Workforce Transformation Requirements</b>	<b>19</b>
<b>6. Conclusions</b>	<b>24</b>
<b>7. Appendices</b>	<b>26</b>
7.1 Appendix A – Figures 1–8, Survey Results	
7.2 Appendix B – Survey Form	
7.3 Appendix C – Survey and Roundtable Contributors	

# 1. Executive Summary

## 1.1 Background: Housing Delivery, Construction Demand and Workforce Pressures

The construction sector in the South East of England plays a critical role in supporting regional growth, housing delivery and major infrastructure development. The region faces a sustained requirement to **deliver approximately 70,000 homes per year**, alongside large-scale projects such as Ebbsfleet Garden City, the Lower Thames Crossing and airport expansion. At the same time, the sector is undergoing structural change, driven by new regulatory requirements, digitalisation and the transition to low-carbon construction.

Despite this demand, **housing delivery across the region has slowed**. Market conditions have become more challenging, with increased borrowing costs, construction cost inflation and reduced buyer confidence affecting development viability. In parallel, **the construction workforce has contracted** in recent years and faces longer-term pressures linked to an ageing workforce and reduced labour supply.

These trends create **a fundamental challenge for the sector**: while demand for housing and infrastructure is expected to increase, the system's capacity to deliver is constrained by a combination of market conditions, regulatory requirements and workforce limitations.

## 1.2 The Purpose of This Study

North Kent College, as the South East Construction Technical Excellence College (SECTEC), commissioned this study to support the development of a robust evidence base on **the barriers to housing delivery and the associated skills and labour challenges across the region**.

The study is intended to inform SECTEC's strategic priorities, including curriculum development, investment decisions and employer engagement. It also supports the establishment of a wider regional partnership to ensure that construction skills provision is aligned with employer needs and future demand.

### 1.3 The Analysis Focuses on Three Core Questions:

1. What are the key reasons why house building is not happening at the required scale?
2. What skills and labour challenges are linked to these barriers?
3. What specific skills gaps need to be addressed to support future delivery?

### 1.4 Approach and Evidence Base

The study combines a range of qualitative and evidence-based approaches, including:

- A targeted review of existing research and policy relating to housing delivery, construction skills and labour markets
- An industry survey capturing perspectives from developers, contractors, consultants, local authorities and other stakeholders
- Structured engagement through roundtables and workshops to gather in-depth qualitative insights

This approach enables the analysis to move beyond headline indicators and provide a more detailed understanding of the operational, commercial and workforce constraints affecting housing delivery across the South East.

### 1.5 Key Findings

- **Structural and market constraints dominate**

Housing delivery is primarily constrained by viability, planning and land availability, alongside regulation, infrastructure and finance. Projects are often delayed or stalled for commercial or regulatory reasons, meaning skills shortages are not the immediate constraint. Delivery is shaped by a wider system of interrelated market and structural pressures.

- **Skills shortages: present but not the immediate constraint**

Skills shortages exist but are currently moderated by lower levels of construction activity. However, weak workforce pipelines mean shortages are likely to intensify as delivery increases.

- **Future workforce capacity: A growing risk**

Confidence in future workforce capacity is low. An ageing workforce, limited new entrants and weak progression pathways have created a “missing middle”, posing a significant medium- to long-term risk to delivery.

- **Occupational pressure points and changing skill requirements**

Shortages are concentrated in key roles, particularly compliance functions such as building control and fire engineering, alongside core site trades and pressure points associated with compliance with the Building Safety Act 2022. Demand is also increasing for skills in digital construction, low-carbon technologies and MMC.

- **Modern Methods of Construction (MMC): Opportunity and capability gap**

MMC offers productivity gains but is constrained by limited workforce capability. Skills gaps in technical design, manufacturing and quality control highlight the need to adapt training provision.

- **Drivers of skills shortages**

Skills shortages are driven primarily by an ageing workforce, low entry from younger people and poor perceptions of the sector, rather than pay alone.

## 1.6 Overview

Skills are not currently the primary constraint on housing delivery, but represent a **significant future risk** as housing delivery accelerates. Addressing this will require closer alignment between skills provision and emerging industry needs, particularly in areas such as compliance, digital construction, low-carbon technologies and MMC. Strengthening employer engagement, improving progression pathways and anticipating future workforce demand will be critical to supporting sustained housing delivery.

## 2. Market Context

Review of national and regional policy, workforce research and housing market analysis indicates that housing delivery in the South East is constrained by a combination of **macroeconomic pressures**, **regulatory** change and **structural industry characteristics**.

**High borrowing costs**, **persistent build-cost inflation** and **reduced buyer confidence** have eroded development margins, leaving many schemes commercially unviable. Simultaneously, increasingly complex planning processes and environmental requirements have extended approval timelines, increasing risk exposure and reducing market certainty.

Since the survey and roundtable discussions, the issues raised have been further compounded by the global economic shockwave associated with war in the Middle East.

The **regulatory landscape** has intensified following post-Grenfell building safety reforms. New compliance regimes, gateway approvals and competency requirements have introduced additional oversight stages and increased demand for specialist professional roles.

Alongside these market pressures, workforce pipelines have weakened. Construction employment has not fully recovered post-pandemic, apprenticeship starts remain below historic levels and the sector faces long-term demographic pressures as experienced workers retire.

This creates a dual constraint:

- In the short term, projects stall as a result of a '**paucity of confidence**' due to viability and regulatory risk.
- In the longer term, insufficient workforce capacity threatens recovery when '**confidence recovers**' and market conditions improve.

### 3. Core Delivery Barriers: Evidence from our Survey and Roundtables

#### 3.1 Structural and Financial Constraints Are the Dominant Barriers

The survey received responses from a range of organisations representing a broad cross-section of the housing and construction ecosystem.

Consultancy organisations formed the largest respondent group, accounting for **32.1%**. This was followed by local authorities, which represented **20.8%**.

Private developers and SME housebuilders were the next most represented groups, each comprising **15.1% of respondents**.

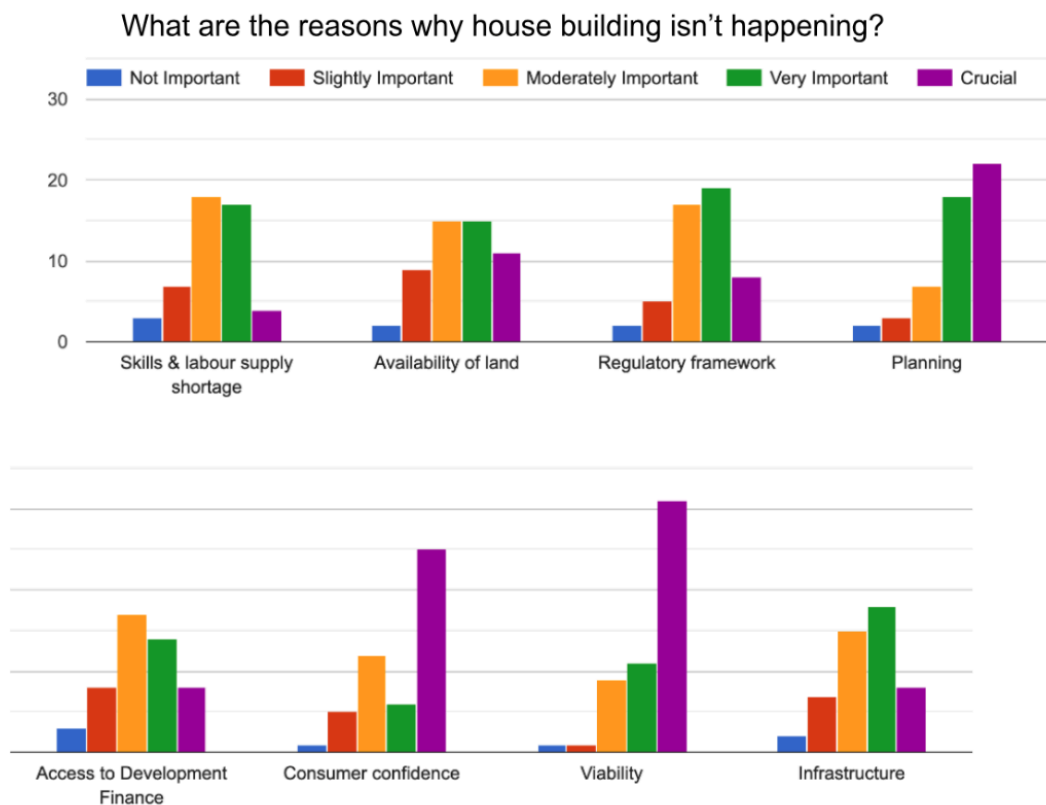
Several other organisation types were represented at smaller but notable levels. Tier 1 housebuilders, Registered Providers, main contractors, off-site/MMC manufacturers and planning advisers each accounted for **5.7% of responses**.

Subcontractors and trade contractors represented **1.9%**, as did organisations classified as developers' lobbying or representative bodies.

Overall, the respondent profile reflects strong representation from advisory and public-sector organisations alongside private-sector developers and delivery partners, ensuring that findings draw on perspectives from across the housing delivery system.

Survey responses from a wide range of organisations demonstrate that housing delivery barriers are primarily structural and commercial in nature:

**Figure 1 – Survey: What are the reasons why house building isn't happening?**



- 100% identified development viability as a barrier
- 98% identified planning constraints
- 98% identified land availability
- 96% identified regulatory complexity
- 94% identified development finance constraints
- 94% identified infrastructure limitations
- 93% identified consumer confidence
- 93% identified skills and labour shortages

Roundtable discussions strongly reinforced this hierarchy of constraints.

A senior housing development consultant explained that when schemes fail to meet financial thresholds, labour supply becomes irrelevant because projects do not proceed.

A development director from a large Registered Provider (RP) noted that prolonged market uncertainty has led organisations to prioritise risk reduction, often resulting in reduced investment in workforce development and innovation.

A local authority planning lead reported that projects frequently stall within consent processes and regulatory gateways (including the Building Safety Act 2022), regardless of contractor readiness.

These perspectives demonstrate that skills shortages operate within a wider system of viability and regulatory barriers rather than acting as standalone constraints.

Survey free-text responses strongly echoed these themes, particularly the interrelated pressures of viability, planning delays and market conditions:

*“Viability in this current market is difficult given the cost of construction, cost of borrowing and landowners’ expectations with land values.”*

*“Cost and length of time to obtain planning is a major barrier, alongside ever-increasing planning contributions and environmental requirements.”*

*“Government constantly changing planning goalposts, so we can’t plan ahead.”*

*“Materials and labour cost increases are putting pressure on all developments.”*

*“Prices are beyond the reach of buyers.”*

*“Housing is not being delivered due to lack of confidence and barriers caused by planning delays, bonds, regulations and compliance – not skills at this moment in time.”*

*“Give greater notice of planning changes to allow the industry to adjust.”*

Collectively, these practitioner perspectives reinforce the survey statistics and roundtable discussions: housing delivery challenges are driven primarily by viability pressures, planning complexity, regulatory burden and weakened market confidence, with skills shortages interacting with, but not dominating, this wider system of constraints.

### 3.2 Regulatory and Compliance Pressures Are Intensifying

Roundtable participants consistently identified regulatory complexity as a growing source of delay and uncertainty.

A building safety professional working in compliance oversight highlighted that the introduction of new gateway processes has significantly lengthened project timelines.

A local authority housing officer reported that regulatory approval stages are now a primary cause of delay, particularly for higher-density developments.

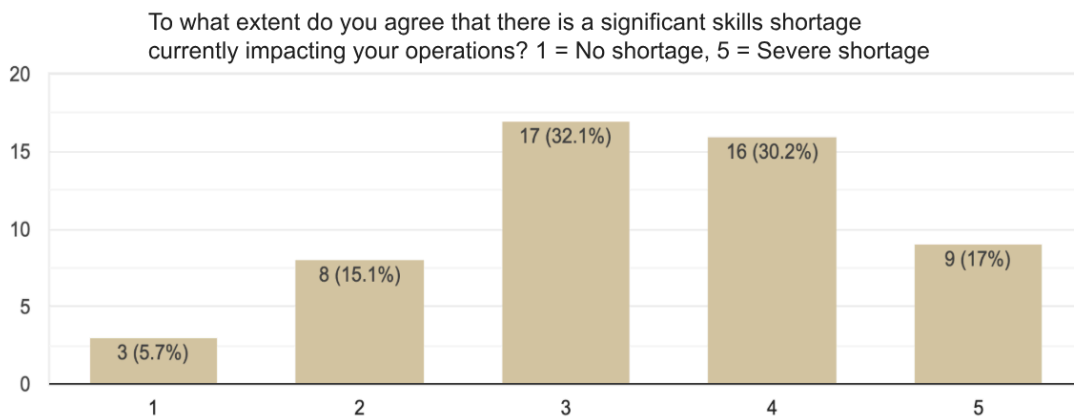
A senior figure from a construction consultancy observed that regulatory frameworks are evolving faster than training provision, creating shortages of professionals qualified to deliver compliance functions.

Survey findings support this assessment: regulatory framework issues were identified as a barrier by **96% of respondents**, and compliance-related roles recorded the highest severity ratings, with **building control inspectors scoring 3.62 out of 5<sup>1</sup>**, the most acute shortage identified.

### 3.3 Skills Shortages Are Present but Moderated by Reduced Market Activity

Survey evidence indicates moderate current workforce pressures:

**Figure 2 – Survey:** *To what extent do you agree that there is a significant skills shortage currently impacting your operations? 1 = Shortage, 5 = Severe shortage*



<sup>1</sup> 1 = No Shortage, 5 = Severe Shortage

- **47% agreed that skills shortages significantly affect operations**
- **32% were neutral**
- **21% disagreed**
- **Average impact score: 3.38 / 5**

However, roundtable participants repeatedly explained that subdued construction activity has temporarily reduced labour demand.

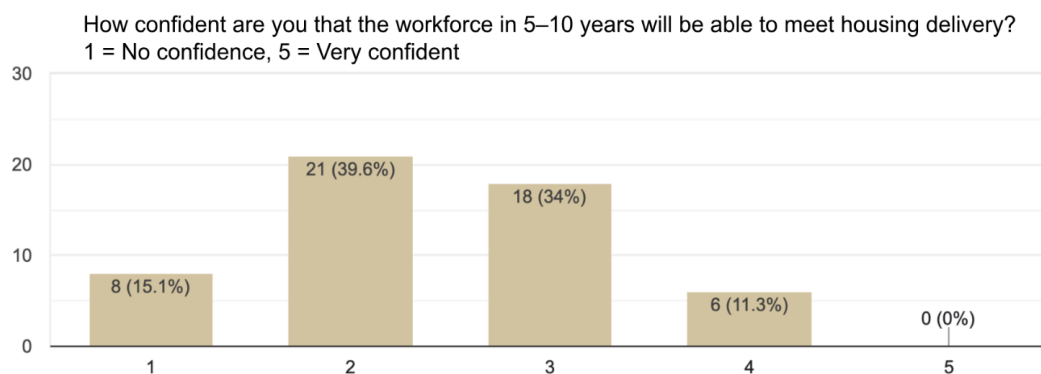
A regional housebuilder noted that slower build-out rates have made recruitment more manageable in the short term, but warned that this reflects suppressed demand rather than improved labour supply.

An industry training provider emphasised that apprenticeship pipelines remain below required levels and that shortages will become more pronounced when output increases.

### 3.4 Future Workforce Capacity Presents Significant Risk

Confidence in future workforce resilience is low:

**Figure 3 – Survey:** *How confident are you that the workforce in 5–10 years will be able to meet housing delivery? 1 = No confidence, 5 = Very confident*



- **55% reported low confidence**

- **34% reported moderate confidence**
- **11% reported high confidence**
- **Average confidence score: 2.42 / 5<sup>2</sup>**

Roundtable discussions highlighted structural demographic risks.

A contractor specialising in large-scale residential projects warned that experienced supervisors and site leaders are retiring faster than new entrants are progressing into management roles.

A further education leader explained that progression pathways from trades into supervisory positions remain underdeveloped, creating a “**missing middle**” of experienced professionals.

### **3.5 Occupational Pressure Points Reflect Structural Shifts in the Industry**

Survey severity ratings indicate concentrated shortages in:

- **Building control inspectors – 3.62 / 5**
- **Bricklayers – 3.40 / 5**
- **Site managers – 3.30 / 5**
- **Digital/BIM specialists – 3.02 / 5**
- **MMC factory operatives – 3.00 / 5<sup>3</sup>**

Roundtable insights show that these shortages reflect changing technical requirements.

A construction consultant specialising in project delivery noted that modern site managers must integrate digital systems, regulatory compliance and multi-disciplinary coordination, requiring skillsets not fully covered by traditional career pathways.

---

<sup>2</sup> 1 = No confidence, 5 = Very confident

<sup>3</sup> 1 = No shortage, 5 = Severe shortage

An MMC manufacturer explained that factory-based production demands precision assembly and quality assurance capabilities that differ significantly from conventional site trades.

### **3.6 Workforce Pressures Are Driven Primarily by Demographics and Recruitment Challenges**

Survey responses identified the most influential drivers of skills shortages as:

- **Ageing workforce — 4.04 / 5**
- **Lack of interest from young people — 4.02 / 5**
- **Perceptions of construction careers — 4.00 / 5**
- **Brexit and reduced migrant labour — 3.98 / 5<sup>4</sup>**

Pay levels and working conditions were considered less influential.

A workforce development specialist reported that outdated perceptions of construction deter young people from entering the sector.

A representative from an industry training organisation emphasised the need for stable, long-term training programmes rather than short-term funding initiatives that undermine employer confidence.

---

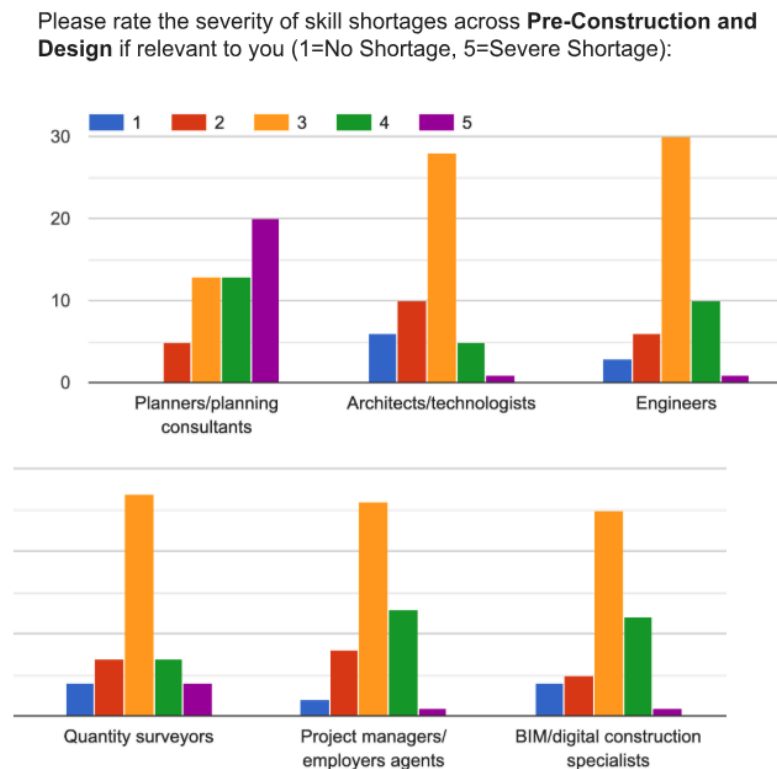
<sup>4</sup> 1 = Not important, 5 = Crucial

## 4. Skills Shortages Across the Workforce

Survey findings and roundtable discussions show that skills shortages are not evenly distributed across the workforce. Instead, pressure is concentrated in occupational areas where regulatory change, digitalisation and evolving construction methods are reshaping competency requirements. The survey distributions indicate that most roles are experiencing **moderate (3)** to **significant (4)** shortages, pointing to systemic workforce strain linked to structural changes in housing delivery.

### 4.1 Pre-Construction and Design

**Figure 4 – Survey:** Please rate the severity of skill shortages across Pre-Construction and Design if relevant to you (1 = No shortage, 5 = Severe Shortage)



Survey responses show widespread moderate shortages across pre-construction and design occupations, with most roles clustering around ratings of **3 (moderate shortage)** and **4 (significant shortage)**.

Engineers, architects/technologists and quantity surveyors show particularly strong concentrations at moderate shortage levels, suggesting that organisations can

recruit but face persistent difficulty sourcing sufficiently experienced professionals. Project managers and employers’ agents also show notable pressure, reflecting the increasing coordination demands of complex housing schemes.

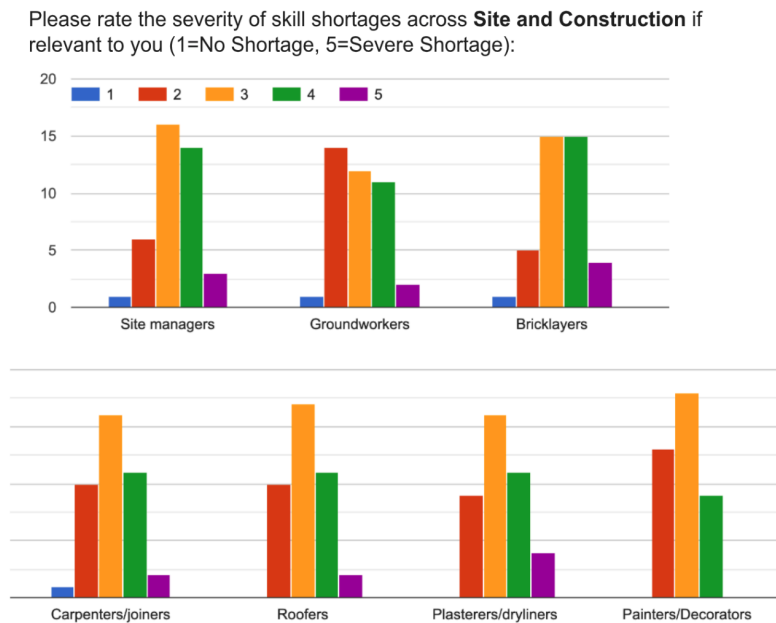
Planners and planning consultants stand out as one of the few occupations where a higher proportion of respondents reported **severe shortages**, indicating acute pressure within statutory planning functions. This aligns with broader evidence of planning delays and local authority capacity constraints.

BIM and digital construction specialists show consistent moderate-to-high shortage ratings, reinforcing concerns that digital integration capability is not expanding at the pace required by modern construction methods.

These patterns indicate that pre-construction pressures are driven less by absolute workforce absence and more by the growing technical complexity of early-stage project development, regulatory navigation and digital coordination.

#### 4.2 Site and Construction

**Figure 5 – Survey:** *Please rate the severity of skill shortages across Site and Construction if relevant to you (1 = No shortage, 5 = Severe Shortage)*



Site-based roles show persistent and broadly distributed skills shortages, with most occupations again clustering around **moderate (3)** and **significant (4)** shortage levels.

Bricklayers and site managers stand out as areas of particularly strong pressure. Bricklaying shortages show a balanced distribution between moderate and significant levels, reflecting ongoing recruitment difficulty in core trades essential to housing delivery. Site managers similarly show elevated ratings, indicating strain in supervisory and coordination roles that underpin project delivery.

Carpenters/joiners, roofers and plasterers also show consistent moderate-to-high shortages, suggesting that labour-intensive trades remain constrained across multiple stages of construction.

Groundworkers show slightly lower severity distributions but still reflect notable pressure, particularly at moderate levels.

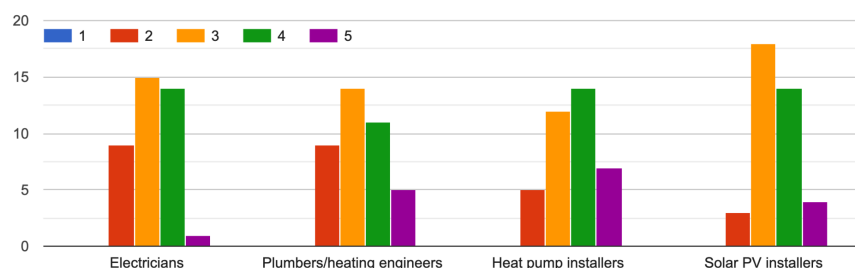
Painters and decorators display moderate shortages across most responses, indicating that finishing trades also contribute to programme delays where workforce capacity is constrained.

These patterns suggest that traditional trades remain critical bottlenecks, but the distribution of responses indicates systemic strain rather than isolated occupational crises. The pressures reflect both demographic factors and the continued reliance on labour-intensive delivery models.

### 4.3 Building Services and Low Carbon

**Figure 6 – Survey:** *Please rate the severity of skill shortages across Building Services & Low Carbon if relevant to you (1 = No shortage, 5 = Severe Shortage)*

Please rate the severity of skill shortages across Building Services & Low Carbon if relevant to you (1=No Shortage, 5=Severe Shortage):



Building services roles show pronounced **moderate (3)** and **significant (4)** shortages, particularly in occupations linked to decarbonisation and electrification.

Electricians and plumbers/heating engineers predominantly fall within the moderate-to-significant shortage range, reflecting sustained demand across both new-build and retrofit markets.

Heat pump installers show one of the strongest significant-to-**severe (5)** shortage patterns, indicating growing strain as low-carbon heating systems expand.

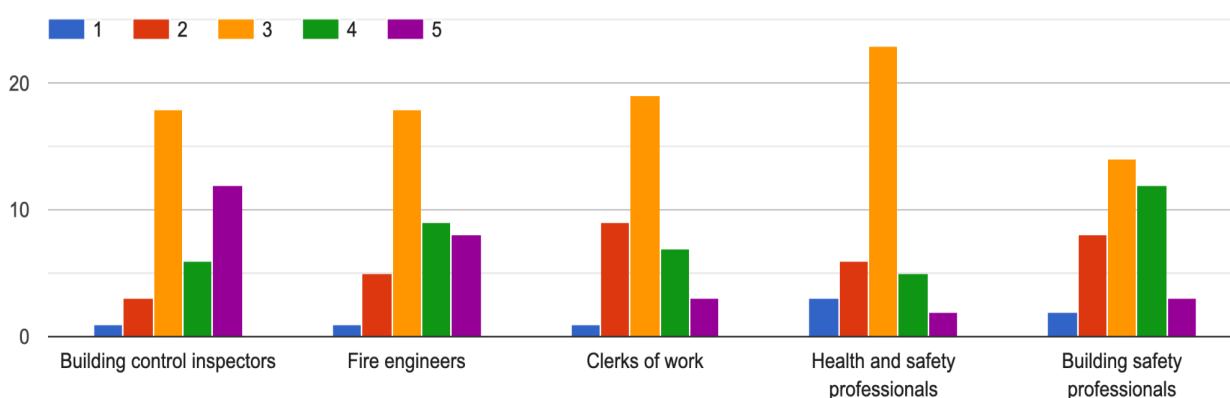
Solar photovoltaic installers similarly display moderate-to-significant shortages, reflecting rapid growth in renewable energy integration within residential developments.

These patterns indicate that low-carbon transition policies are generating demand for specialist technical skills faster than training pipelines can respond, creating emerging structural shortages.

#### 4.4 Compliance and Quality

**Figure 7 – Survey:** *Please rate the severity of skill shortages across Compliance and Quality if relevant to you (1 = No shortage, 5 = Severe Shortage)*

Please rate the severity of skill shortages across Compliance and Quality if relevant to you (1=No Shortage, 5=Severe Shortage):



Compliance and quality roles show some of the most acute skills pressures across the survey, with several occupations displaying strong, **significant (4)** and **severe (5)** shortage patterns.

Building control inspectors stand out with particularly elevated severe shortage ratings, reinforcing their position as a critical bottleneck in project approval and regulatory oversight.

Fire engineers also show significant-to-severe shortages, reflecting the heightened technical requirements introduced by building safety reforms.

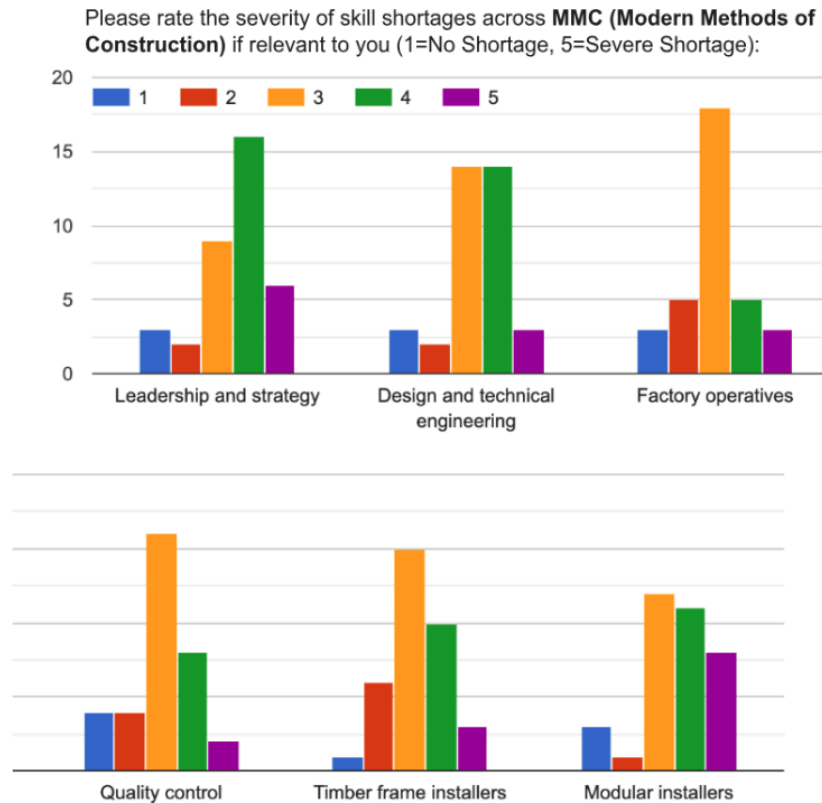
Clerks of works and building safety professionals display consistent moderate-to-significant shortages, indicating persistent quality assurance capacity gaps.

Health and safety professionals show primarily moderate shortages, though still reflecting sustained workforce pressure.

These findings indicate that regulatory and compliance capacity has become a structural constraint on housing delivery. Unlike trade shortages, which may slow programmes, compliance workforce gaps can delay or halt projects entirely.

## 5. Modern Methods of Construction (MMC): Workforce Transformation Requirements

**Figure 8 – Survey:** Please rate the severity of skill shortages across MMC (Modern Methods of Construction) if relevant to you (1 = No shortage, 5 = Severe Shortage)



Survey evidence and insights from Roundtable 3 indicate that Modern Methods of Construction (MMC) represent a major strategic opportunity to accelerate housing delivery, but one that requires systemic industry transformation rather than incremental expansion of traditional trades.

Although MMC roles did not record the highest overall shortage severity scores in the survey, response patterns show consistent moderate (3) to significant (4) shortages across MMC occupations, indicating **widespread capability gaps likely to intensify as adoption increases**.

- **MMC Skills Pressure Across Occupational Areas**

Survey distributions suggest that MMC workforce challenges are characterised by systemic moderate-to-significant pressure across occupational areas rather than isolated crisis-level shortages.

Factory operatives show strong moderate shortage patterns, indicating that roles can be filled, but organisations struggle to recruit workers with appropriate technical preparation for industrialised production environments.

Quality control and design/technical engineering roles show elevated pressure, reflecting the increasing importance of precision, technical integration and early-stage coordination in industrialised delivery models.

Leadership and strategic roles also demonstrate significant shortages, reinforcing concerns that organisational capability is lagging behind technological ambition. Stakeholders emphasised that MMC requires different procurement planning, pipeline forecasting and supply-chain coordination compared with traditional construction models.

Modular installer roles show wider variation in shortage patterns, suggesting uneven experience across regions and firms.

Importantly, very few respondents indicated “no shortage” across MMC roles, reinforcing that workforce gaps are widespread rather than confined to niche specialisms.

- **MMC Production and Factory-Based Delivery Models**

Roundtable participants emphasised that MMC fundamentally alters the construction production environment by shifting activity from dispersed sites to controlled manufacturing settings.

Industrialised production relies on precision assembly, tightly sequenced workflows and strict tolerances, requiring a disciplined, process-driven workforce rather than reactive site-based labour. Workers must therefore develop competencies in precision fitting, standardised assembly and quality assurance processes that differ significantly from conventional trades.

However, respondents stressed that industrialised production can only succeed where viable factory pipelines exist. As one participant noted:

*“There needs to be sufficient demand to justify each factory, within the parameters of the flexibility that the factory can produce.”*

Another respondent reinforced the need for scale:

*“Requires significant scale to be viable.”*

Concerns about financial risk and organisational sustainability were also prominent:

*“Risk of insolvency of MMC firms.”*

*“Concern over longevity of manufacturers.”*

These perspectives highlight that workforce capability alone is insufficient without stable pipelines and sustainable production models.

- **Technical Coordination and Early-Stage Integration**

Participants emphasised that MMC requires delivery methodologies to be embedded at the earliest stages of project planning and design.

A respondent highlighted the importance of integrating delivery methodology during scheme development:

*“Planning and design – delivery methodology has to be recognised in the design phase.”*

Others stressed the need for clearer client understanding and coordination:

*“A clear understanding of the importance of design freeze from clients.”*

Standardisation was also identified as a challenge where institutional frameworks remain aligned to traditional construction approaches:

*“Councils accepting standardisation required as a result of MMC.”*

These insights suggest that MMC adoption requires changes in planning systems, procurement processes and client expectations, not simply technical retraining.

- **Confidence, Perception and Market Readiness**

A dominant theme across survey responses was the central role of **confidence** in enabling MMC expansion. Respondents consistently linked adoption barriers to market perception, financial risk and institutional hesitancy.

Several participants emphasised confidence-related barriers:

*“Consumer and client confidence.”*

*“Confidence of the wider sector, particularly RPs.”*

*“Market confidence.”*

Perception issues were also repeatedly highlighted:

*“Perception about ‘pre-fab’; lack of understanding of DfMA (Design for Manufacture and Assembly).”*

*“Perception following failures of large-scale operations.”*

Financial institutions were seen as particularly influential:

*“Mortgage providers lending on MMC.”*

*“Attitude of insurance companies.”*

*“Cost, warranty and mortgage provider acceptance.”*

Respondents also noted that market demand and planning constraints interact with confidence:

*“It’s a demand issue now. That and planning.”*

Collectively, these comments indicate that MMC adoption is constrained not only by technical capacity but by investor, lender, insurer and client confidence in delivery models.

- **Organisational Capability and Commercial Systems**

MMC delivery requires organisational capabilities extending beyond technical skills.

Several respondents highlighted the need for stronger procurement and business planning systems:

*“MMC companies tend to have land buyers, business development and finance people – they need more to secure and control the procurement.”*

Others emphasised the importance of fair commercial practices and stable financial systems:

*“We need to return to good principles of construction – fair contracts and contractors being paid on time.”*

*“Finance and long-term commitment.”*

Concerns regarding cash flow and financial stability were also prominent:

*“Insolvency risk, cash flow.”*

These insights indicate that industrialised delivery depends on robust commercial frameworks capable of sustaining long-term investment.

- **Cultural Readiness and Industry Mindset**

Participants emphasised that MMC requires cultural as well as technical transformation.

One respondent highlighted resistance to innovation:

*“Reluctance to embrace new systems and technology.”*

Others emphasised the need to modernise employment approaches and career pathways:

*“There are plenty of skills and people when the industry offers developmental careers with meaning. Thinking differently about employment is more important than trying to scale up old-fashioned methods.”*

These reflections suggest that workforce attraction, retention and modern employment models are central to enabling industrialised construction.

- **Summary of MMC Workforce Implications**

MMC represents a **structural transformation of housing delivery** requiring coordinated change across workforce skills, organisational systems and market confidence.

While workforce shortages are typically moderate-to-significant rather than acute, **capability gaps are widespread and likely to intensify as adoption scales.**

Successful MMC expansion depends not only on retraining workers but also on **strengthening leadership capability, commercial systems, institutional readiness and confidence** across the wider delivery ecosystem.

Without this integrated transformation, MMC risks underperformance despite its potential to accelerate housing delivery.

## 6. Conclusions

Housing delivery constraints in the South East are shaped by a **dual dynamic of market confidence and structural capacity**.

In the short term, projects stall as a result of a **'paucity of confidence'** driven by viability pressures, planning delays and regulatory risk. Financial uncertainty, extended approval processes and rising compliance requirements create conditions in which developers defer investment and organisations prioritise risk reduction over expansion.

Practitioner evidence reinforces the scale of these pressures. One development professional observed:

*"Viability in this current market is difficult given the cost of construction, cost of borrowing and landowners' expectations with land values."*

Planning systems and regulatory requirements further compound uncertainty. A sector respondent highlighted the cumulative procedural burden facing development:

*"Cost and length of time to obtain planning is a major barrier, alongside ever-increasing planning contributions and environmental requirements."*

**Together, these constraints weaken market confidence, suppress build-out rates and reduce incentives for firms to invest in innovation, workforce development and supply-chain expansion.**

In the longer term, however, **insufficient workforce capacity threatens recovery when confidence returns** and market conditions improve. While skills shortages are not universally perceived as the immediate delivery barrier, stakeholders consistently warned that labour and skills gaps will become critical once activity accelerates.

As one respondent explained:

*"Housing is not being delivered due to lack of confidence and barriers caused by planning delays and regulation, not skills at this moment in time."*

This view was frequently accompanied by concern about future readiness. Another participant warned:

*“We must address skills now so they are not the problem in 10-15 years’ time.”*

**Demographic pressures, supervisory gaps and weakened training pipelines therefore represent substantial latent risks.** As experienced professionals retire and progression pathways remain constrained, the sector faces the possibility of recovery being limited not by finance or planning but by workforce capacity.

At the same time, the construction sector is undergoing **structural transformation toward industrialised, digitally integrated and sustainability-focused delivery models.** These shifts require new technical competencies, stronger coordination capabilities and greater organisational adaptability. Incremental change will not be sufficient. As one industry respondent emphasised:

*“We need to change – not just scale outdated methods and careers.”*

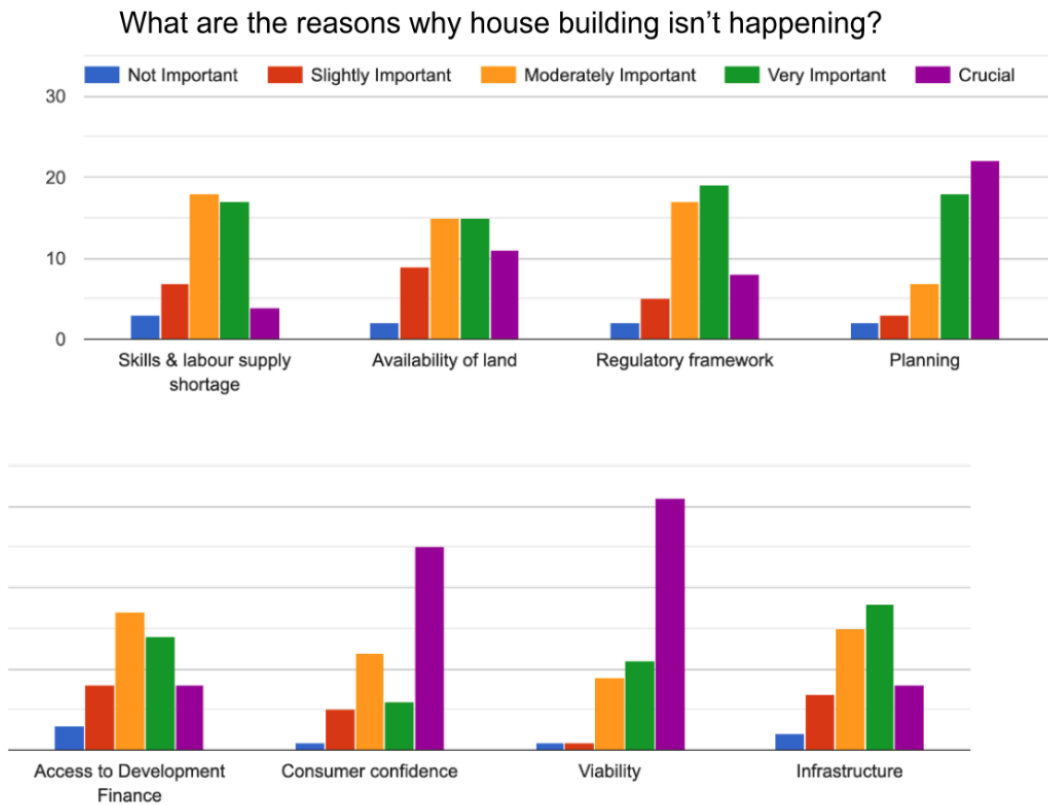
**Workforce strategies must therefore prioritise adaptability, digital competence and cross-disciplinary coordination** to ensure that training provision aligns with emerging delivery models.

**SECTEC is strategically positioned to support this transition.** By aligning technical education, employer engagement and partnership investment with evolving industry requirements, SECTEC can help strengthen workforce resilience and support sustained housing delivery as market confidence returns.

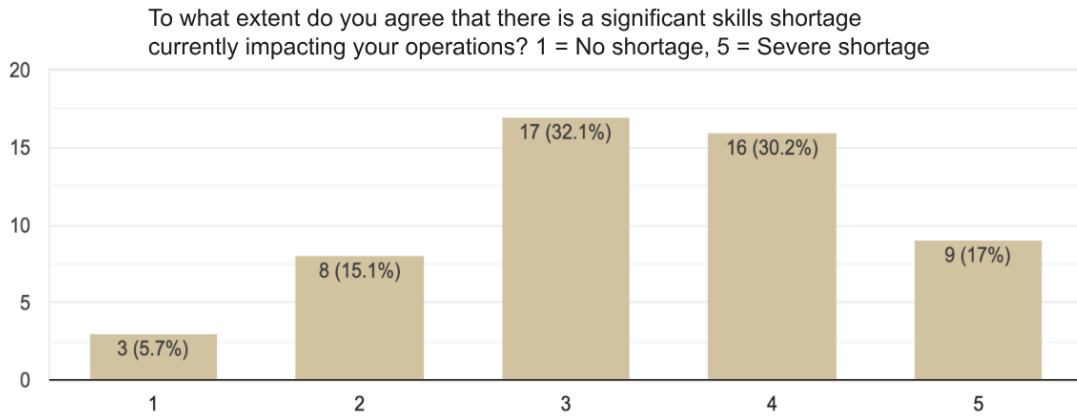
## 7. Appendices

### Appendix A – Figures 1–8, Survey Results

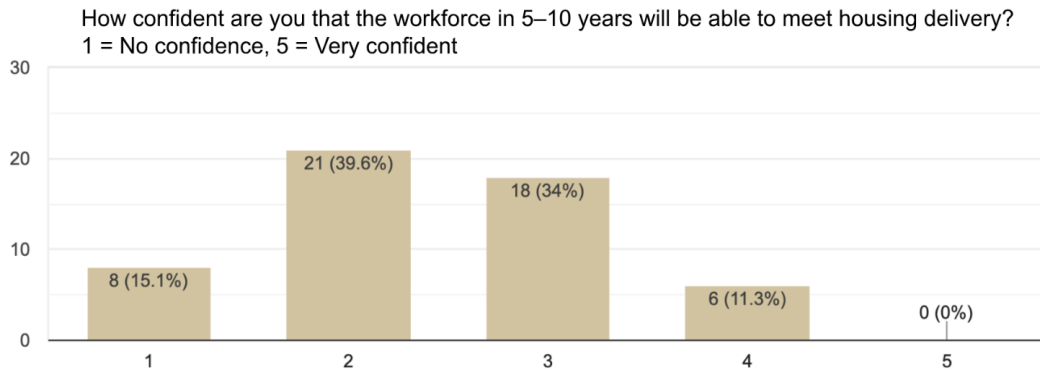
Figure 1 – Survey: *What are the reasons why house building isn't happening?*



**Figure 2 – Survey:** *To what extent do you agree that there is a significant skills shortage currently impacting your operations? 1 = Shortage, 5 = Severe shortage*

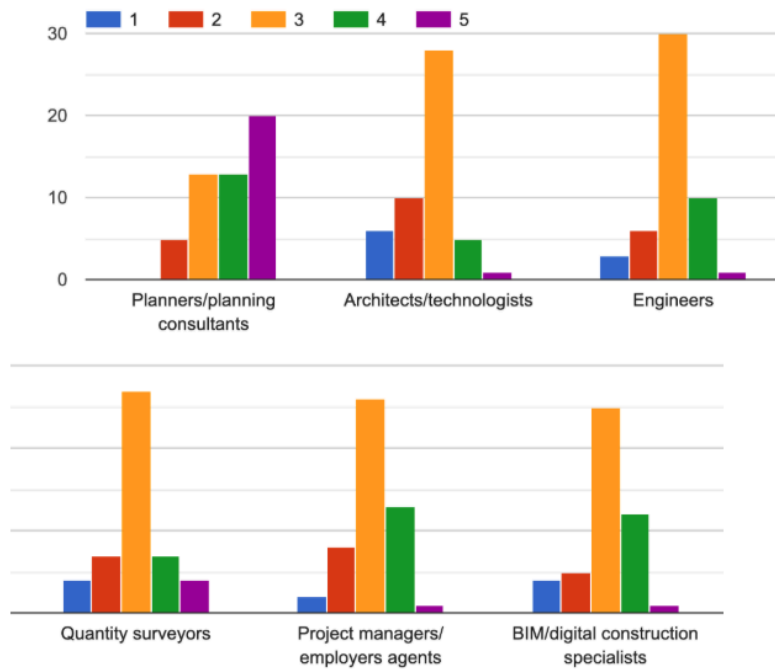


**Figure 3 – Survey:** *How confident are you that the workforce in 5–10 years will be able to meet housing delivery? 1 = No confidence, 5 = Very confident*



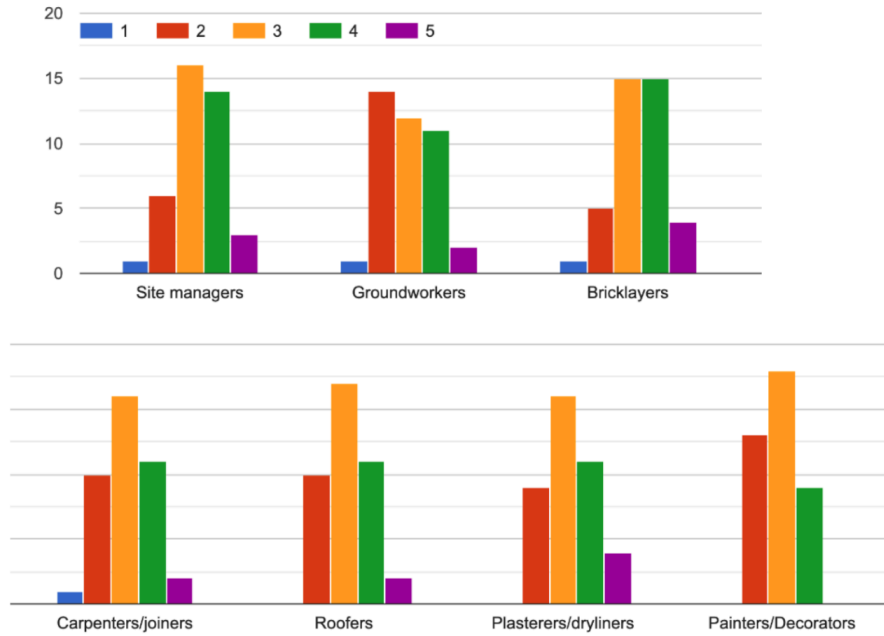
**Figure 4 – Survey: Please rate the severity of skill shortages across Pre-Construction and Design if relevant to you (1 = No shortage, 5 = Severe Shortage)**

Please rate the severity of skill shortages across **Pre-Construction and Design** if relevant to you (1=No Shortage, 5=Severe Shortage):



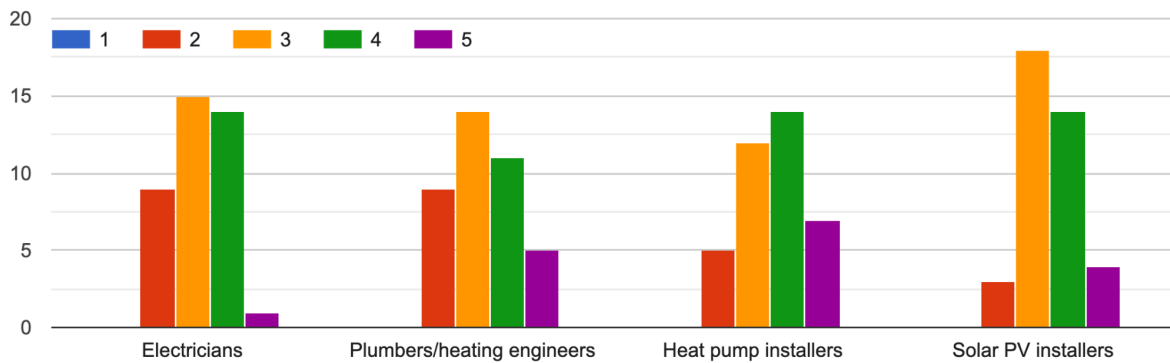
**Figure 5 – Survey: Please rate the severity of skill shortages across Site and Construction if relevant to you (1 = No shortage, 5 = Severe Shortage)**

Please rate the severity of skill shortages across **Site and Construction** if relevant to you (1=No Shortage, 5=Severe Shortage):



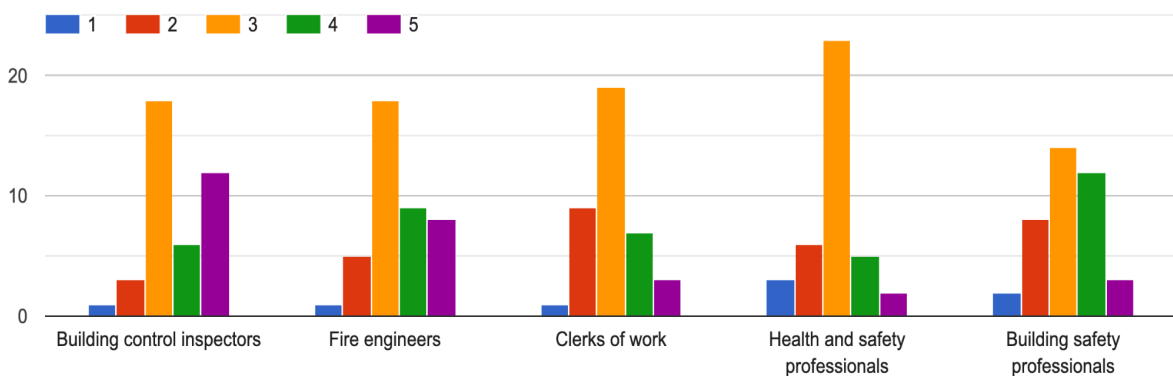
**Figure 6 – Survey: Please rate the severity of skill shortages across Building Services & Low Carbon if relevant to you (1 = No shortage, 5 = Severe Shortage)**

Please rate the severity of skill shortages across Building Services & Low Carbon if relevant to you (1=No Shortage, 5=Severe Shortage):

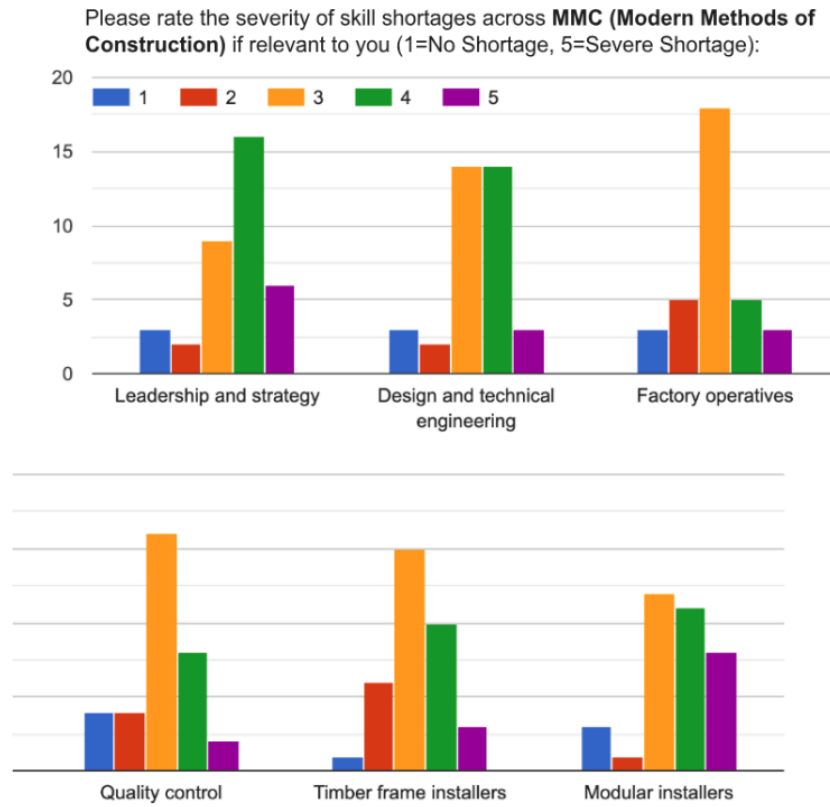


**Figure 7 – Survey: Please rate the severity of skill shortages across Compliance and Quality if relevant to you (1 = No shortage, 5 = Severe Shortage)**

Please rate the severity of skill shortages across Compliance and Quality if relevant to you (1=No Shortage, 5=Severe Shortage):



**Figure 8 – Survey:** *Please rate the severity of skill shortages across MMC (Modern Methods of Construction) if relevant to you (1 = No shortage, 5 = Severe Shortage)*



## Appendix B – Survey Form

### Skills Analysis in Construction to Support Housing Delivery

Regional Construction Technical Excellence Colleges have recently been established to address the growing demand for skilled construction professionals. Backed by over £100 million from Government, the CTECs aim to train over 40,000 construction workers by 2029, reducing the reliance on overseas labour and delivering the workforce needed to meet the demand of house building and major infrastructure projects.

The South East CTEC, led by North Kent College, is seeking to identify and understand the key barriers to housing delivery within the region, and specifically those that relate to skills and labour supply shortages. This will help to inform its planning, priorities and investments to support the construction industry and housing delivery across the region.

We'd therefore be grateful if you would please provide your insights on the current skills landscape, shortages, and training needs within the construction industry in the South East.

Name

---

Email

---

Role

---

Organisation

---

**What best describes your organisation?**

Tick all that apply.

- Tier 1 housebuilder
- Registered Provider
  - Private developer
  - SME housebuilder
  - Main contractor
- Subcontractor/trade contractor
  - Local authority
  - Consultant
- Off-site/MMC manufacturer
  - Planning Adviser
- Other: \_\_\_\_\_

**Which area(s) do you primarily operate in?**

Tick all that apply.

- Kent
- East Sussex
- West Sussex
- Surrey
- Buckinghamshire
  - Oxfordshire
  - Berkshire
  - Hampshire
  - Isle of Wight
- Other: \_\_\_\_\_

**What are the reasons why house building isn't happening?**

Mark only one oval per row.

Not Important  Slightly Important  Moderately Important  Very Important  Crucial

Skills & labour supply shortage

Availability of land

Regulatory framework

Planning

Consumer confidence

Viability

Infrastructure

Please provide any other reasons.

---



---



---

**To what extent do you agree that there is a significant skills shortage currently impacting your operations?**

(1 = Strongly Disagree, 5 = Strongly Agree)

**How confident are you that the workforce in 5–10 years will be able to meet housing delivery?**

(1 = No Confidence, 5 = Very Confident)

**Please rate the severity of skill shortages across Pre-Construction and Design if relevant to you (1 = No Shortage, 5 = Severe Shortage):**

Planners/planning consultants

Architects/technologists

Engineers

Quantity surveyors

Project managers/employers agents

BIM/digital construction specialists

**Please rate the severity of skill shortages across Site and Construction if relevant to you (1 = No Shortage, 5 = Severe Shortage):**

Site managers

Groundworkers

Bricklayers

Carpenters/joiners

Roofers

Plasterers/dryliners

Painters/Decorators

**Please rate the severity of skill shortages across Building Services & Low Carbon if relevant to you (1 = No Shortage, 5 = Severe Shortage):**

Electricians

Plumbers/heating engineers

Heat pump installers

Solar PV installers

**Please rate the severity of skill shortages across Compliance and Quality if relevant to you (1 = No Shortage, 5 = Severe Shortage):**

Building control inspectors

Fire engineers

Clerks of work

Health and safety professionals

Building safety professionals

**Please rate the severity of skill shortages across MMC (Modern Methods of Construction) if relevant to you (1 = No Shortage, 5 = Severe Shortage):**

Leadership and strategy

Design and technical engineering

Factory operatives

Quality control

Timber frame installers

Modular installers

**Please provide any other barriers to delivering housing growth through MMC.**

---

---

---

**Please rate the primary factors contributing to the skills shortages (1 = Not important, 5 = Crucial):**

Ageing workforce/Retirement rates

Lack of interest from young people

Inadequate pay

Working conditions

Insufficient funding/availability of training programs (e.g., Apprenticeships)

Competition with other sectors for talent

Brexit/Changes to migrant labour

Perceptions/awareness of the sector

**Please provide any additional comments.**

---

---

---

## Appendix C – Survey & Roundtable Contributors

We would like to thank all the people below who contributed their time and insight to this research through the survey and roundtable discussions.

<b>Name</b>	<b>Role</b>	<b>Organisation</b>
Abby Raymond	Infrastructure Manager	Kent County Council
Abi Jacobs	Director	Barley Homes / West Suffolk Council
Alistair Milne	Director	Corstorphine & Wright
Andrew Taylor	Group Planning and Sustainability Director	Vistry
Annabel McKie	Director SE	Red Loft LLP
Anthony Greer	Founder and Executive Director	Talo
Audley English	Architect	Buildeco Offsite Architecture
Ben Barnes	Director	Prime Construction SE Ltd
Bill Hampton	Managing Director	Etopia
Boaitey-Seddon, Damian	Group Commercial Director	Persimmon PLC
Brian Horton	Director	Horton Strategic Limited
Byron Woodmansee	Founder & Director	Coral Living Ltd
Caroline Jackson	Adult Learning Project Coordinator	East Sussex County Council
Cherie Leavy	Associate Director of Social Value	Arcadis

Chris Crook	Managing Director	Kingsgate Property Consultants Ltd
Chris Hammond	Founder and Group Director	Beau Property
Chris Inwood	Economic Development Manager	Maidstone Borough Council
Chris Loughead	Operations Director	Fernham Homes
Chris Moore	Managing Director	Bellway Homes Kent Division
Chris Wills	Director	Aspire Designer Homes Ltd
Claire Flowers	Partnerships Director	Potter Raper
Clive Suggitt	—	C S Developments (Sussex) Ltd
Colin Finch	Development Investment Team Manager	Kent County Council
Danny Wood	Operations Director	PCImmens
David Shepherd	New Business & Partnerships Director at Chartway Partnerships	Chartway Partnerships Group
Debansu Das	Business Development Director	Zed Pods Limited
Derek Godfrey	Consultant	Westcott Leach Ltd
Dominic Westhoff	Housing Strategy Officer	—
Eleanor Evans	Planning Services Manager	Hastings Borough Council
Ella Brocklebank	Head of Communications & Business Development	Jenner Group
Emily Howard	Manager – Affordable Housing Growth	Homes England

Gavin Mackenzie	Founder	Nest Property
Giles Holloway	Housing/Construction Lead	Ashford Borough Council
Giulio D'Andrea	—	—
Graham Cox	Land and Development	Kind and Co
Graeme Quinnell	Housing & Homelessness Partnership Manager	Rother District Council
Helen Gunnell	Programme Manager - Residential	Eastbourne Borough & Lewes District Councils
Helen Russell	Associate Project Director	SECTEC
Holly Aquilina	Employability and Skills Strategy Manager,	East Sussex County Council
Iain Divitt	Founder	MET Homes Limited
Imogen Sprackling	Consultant	SQW
Jeff Maxted	Director of Technical Consultancy	BLP Insurance
John Stebbings	Director	Stebbing Associates
Jonny Siqueira	Sales Lead	Taylor (MMC)
Julian Seymour	Chief Executive	Cratus Group
Keith Grimley	Senior Economic Development Officer	Gravesham Borough Council
Lara Pool	Inclusive Growth Manager	Ebbsfleet Development Corporation
Lee Carter	Business Partnership Lead	Essex County Council

Lewis Herbert	Modular Communities Adviser	Allia Future Homes
Marc Dorfman	—	Planning First (Lewes-Eastbourne)
Mark Andrews	Deputy Executive Principal	North Kent College / SECTEC
Mark Bewsey	Planning Consultant	DHA
Mark Curle	Managing Director	Adair
Mark Farmer	Founder & Board Executive	Cast
Mark James	Strategic Housing Manager	Thanet District Council
Mark Tree	—	—
Matthew Woodhead	Planner	DHA Planning
Matt O'Halloran	—	Thakeham Homes
Mike Bodkin	Head of Planning	TOWN
Nick Fenton	Chair	Kent Housing & Development Group
Nimi Gabriele	—	Formation Architects
Nicola Bale	Regional Development Director – South East	Places for People
Norman Hinckes	Managing Director	Masonry Frame Systems Ltd
Paul Henry	Managing Director	Esquire Developments
Peter Searle	Director	Searle Management Consulting Ltd
Philip Warr	Chartered Quantity Surveyor	Purpose Social Homes Limited
Rhys-Evans Edet	Managing Director	The Modern Builder

Richard Ogden	—	—
Rick Bhatia	Head of Land & Partnerships	Southern Housing
Rob Symons	Managing Director (South)	FINC
Robert Najem	Director	BuildHelp Limited
Ross Gill	Consultant	SQW
Saul Humphrey	—	Saul D Humphrey LLP / CIOB / ARU
Sarah Robson	Deputy Chief Executive	Sevenoaks District Council
Sean Broster	—	PFP Developments (Places for People)
Simon Griffin	Development Project Manager	Places for People
Simon Roden	Architect	Formation
Simon Thomas	Head of Planning and Health Planning and Health	Canterbury City Council
Steve Samson	Head of Economy	KCC
Stuart Wigley	Partner	Baily Garner LLP
Sue Phipps	Regeneration Officer (Housing)	Canterbury CC
Terry Fuller	Non-Executive Director	Graven Hill Development Company
Tom Casey	Director	Counties and Capital
Tim McLoughlin	Lead Development Manager (East)	Hyde Housing Association
Tim Quick	Director	Formation

Tim Warren	Development Director	Jenner Contractors Ltd
Tony Battle	MMC Specialist	—
Tracy Botley	Training Manager	OHOB Group Limited

## About us

**South East Housing and Development Group (SE HDG)** brings together public and private sector leaders to address the critical challenges facing housing delivery across the region.

Drawing on strategic insight and industry expertise, SE HDG works to align policy, skills development and market needs to support sustainable growth.

As highlighted in this report, the group plays a key role in shaping evidence-based responses to structural barriers, workforce pressures and the evolving demands of the construction sector in the South East.

### Contact:

**Nick Fenton** – Chair  
Email: [nick@fenton.net](mailto:nick@fenton.net)

**Brian Horton** – Strategic Housing Advisor  
Email: [brian@hortonstrategic.com](mailto:brian@hortonstrategic.com)

**Amani Horton** – Associate Consultant  
Email: [amani@hortonstrategic.com](mailto:amani@hortonstrategic.com)

