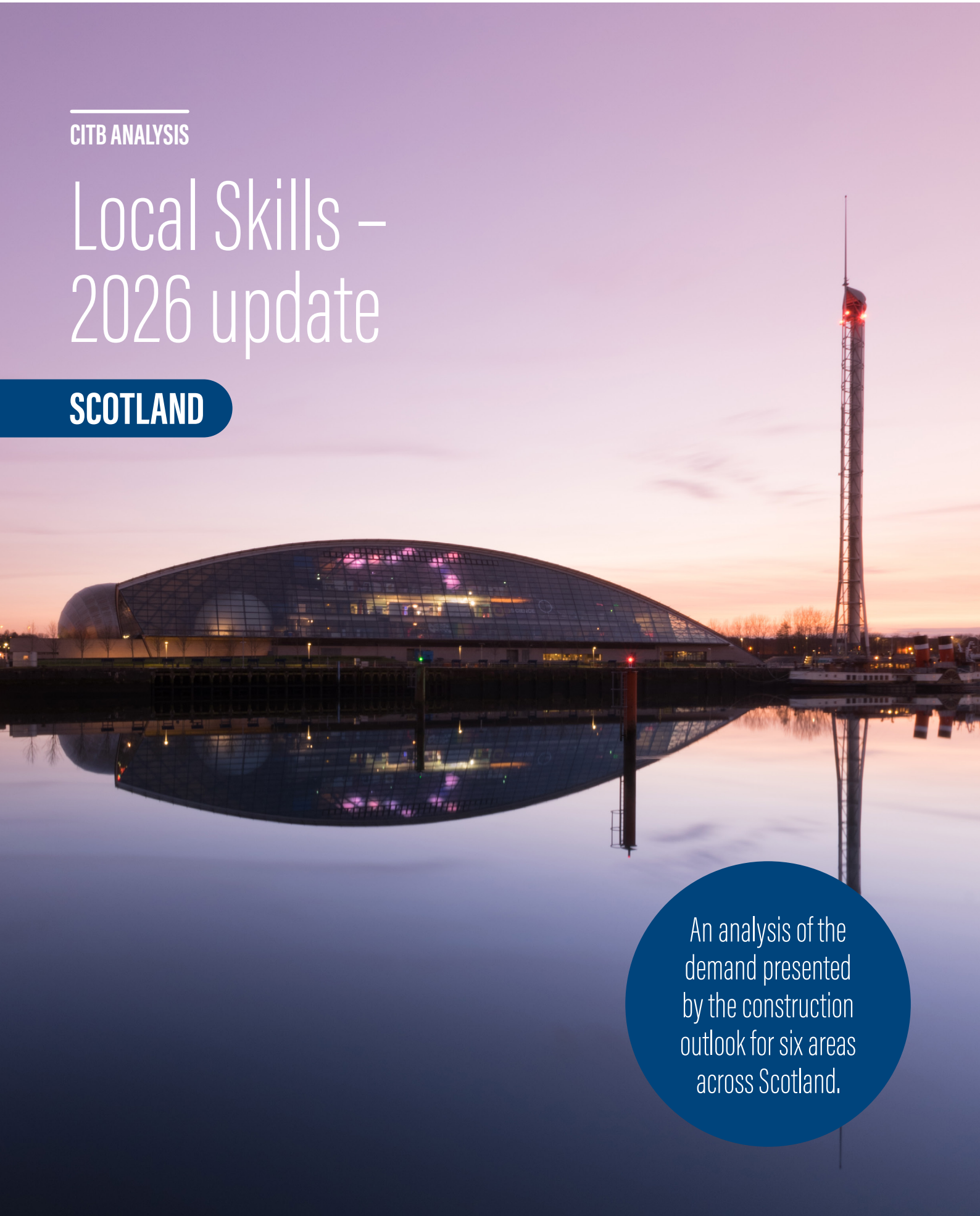
CITB ANALYSIS

Local Skills – 2026 update

SCOTLAND



An analysis of the demand presented by the construction outlook for six areas across Scotland.

Contents

1. Exec summary 3
2. Introduction 4
3. Labour demand in Scotland 6
3.1. Pipeline of projects 6
3.2. Estimate of labour demand 7
3.3. Average labour demand by local area 2026–2030 8
4. Workforce supply 9
4.1. Business distributionby local area 2026–2030 9
4.2. Workforce location by area 10
4.3. Construction job vacancies 11
4.4. Workforce mobility 12
5. Gap analysis 13
6. Scenario: Highlands and Islands, Workforce North 14
7. Conclusions and recommendations 17

List of Figures and Tables

Figure 1: Local areas, Scotland 4
Figure 2: Average labour demand by local area, Scotland, 2026–2030 7
Figure 3: Index of online job vacancy postings, Scotland 11
Figure 4: Index of online job vacancy postings, Scotland and selected local area 11
Figure 5: Index of online job vacancy postings, Scotland and selected local areas 12
Figure 6: Average labour demand by local area, Scenario, Scotland, 2026-2030 15

Table 1: Key data for projects by local area in Scotland (total project pipeline) 6
Table 2: New-build construction spend by project type in 2026 (defined, known project pipeline) 7
Table 3: Construction labour demand by local area, Scotland, 2026–2030 8
Table 4: Construction business distribution, Scotland 9
Table 5: Workforce location by local area, Scotland, 2025 vs 2023 10
Table 6: Workforce breakdown by local area, Scotland 10
Table 7: Gap analysis breakdown by local area, Scotland 13
Table 8: Construction spend estimates for Highlands and Islands pipelineby local area, Scotland 14
Table 9: Scenario gap analysis breakdown by local area, Scotland 16



Exec Summary

Scotland is expected to have enough construction workers overall to meet demand between 2026 and 2030. However, workers and skills are not spread evenly across the country.

Some areas may not have enough local workers, while others may have more than they need. Understanding these differences will be important in planning the workforce and skills needed to deliver future investment and support economic growth.

This report compares estimated workforce demand with the number of construction workers based across six areas of Scotland. As in previous Local Skills reports, East Central Scotland has the largest shortfall, with considerably more workers needed than are based within the area. West Central Scotland also has fewer locally based workers than estimated demand.

In the other four areas, the number of workers based locally is higher than estimated demand. This does not necessarily mean that these workers are readily available to meet demand elsewhere. Most people working in Scotland's construction industry are based in Scotland and do not travel far for work compared with workers elsewhere in the UK. This may limit how easily workers can move between areas if demand increases in a particular location.

Recruitment remains a challenge for many construction employers. Although online job vacancy postings have reduced from the exceptionally high levels seen during 2023, vacancy levels remain above those recorded at the start of the decade. Employers in the North Eastern and Highlands and Islands areas continue to face recruitment challenges, despite having a relatively large local construction workforce. This suggests that worker numbers alone do not determine how easy it is to fill vacancies, as employers may still struggle to find people with the right skills for the jobs available.

The most significant future workforce challenge identified in this report relates to proposed energy and infrastructure investment in the Highlands and Islands. Based on published investment plans, demand for construction workers in the area could more than double if the proposed work progresses. This could increase total construction workforce demand in Scotland by around 12%, creating additional demand across a wide range of occupations. The timing and delivery of this investment remain uncertain, but the scale of the potential impact underlines the importance of early workforce and skills planning.

Meeting the workforce requirements for the energy and infrastructure investment in the Highlands and Islands requires collaborative working from all stakeholders. To support this, CITB will collaborate with key industry players such as the Civil Engineering Contractors Association (CECA) and the Scottish Plant Owners Association (SPOA), as well as with local agencies, to assist in helping deliver the construction skills and training requirements linked with the ambitions of the Highlands and Islands infrastructure plans.

CITB's role and remit in relation to workforce planning and employer/learner support is captured within our 4-year GB Strategic Plan to 2029: CITB Strategic Plan and within the CITB Scotland Nation Plan 2025-26 CITB Scotland Nation Plan.

Successfully delivering major investment programmes, particularly those linked to energy infrastructure, will require sustained collaboration between industry, government, training providers and other stakeholders. It will be critical to supporting Scotland's future growth ambitions. Scotland will have to build the workforce and skills to meet demand by ensuring that people can access rewarding careers in construction, and that employers can recruit and develop the workforce they need.

2. Introduction

This is the third Local Skills for Scotland report produced by CITB, working with Whole Life Consultants Ltd. It provides a focused assessment of workforce demand, supply and emerging skills gaps across Scotland, complementing the national view set out in the Construction Workforce Outlook. For the purposes of the report the 32 local authorities in Scotland are grouped into six areas as shown in Figure 1.

We acknowledge that these areas don't exactly correlate to City or Growth Deal areas, however, they allow disaggregation of workforce data to be made for labour demand and supply and are consistent with International Territory Level 2 (ITL2) geographical boundaries.

This report examines future workforce demand against supply, using the same approach to gauge potential workforce gaps in Scotland, enriching the evidence base and helping to inform regional skills action plans.

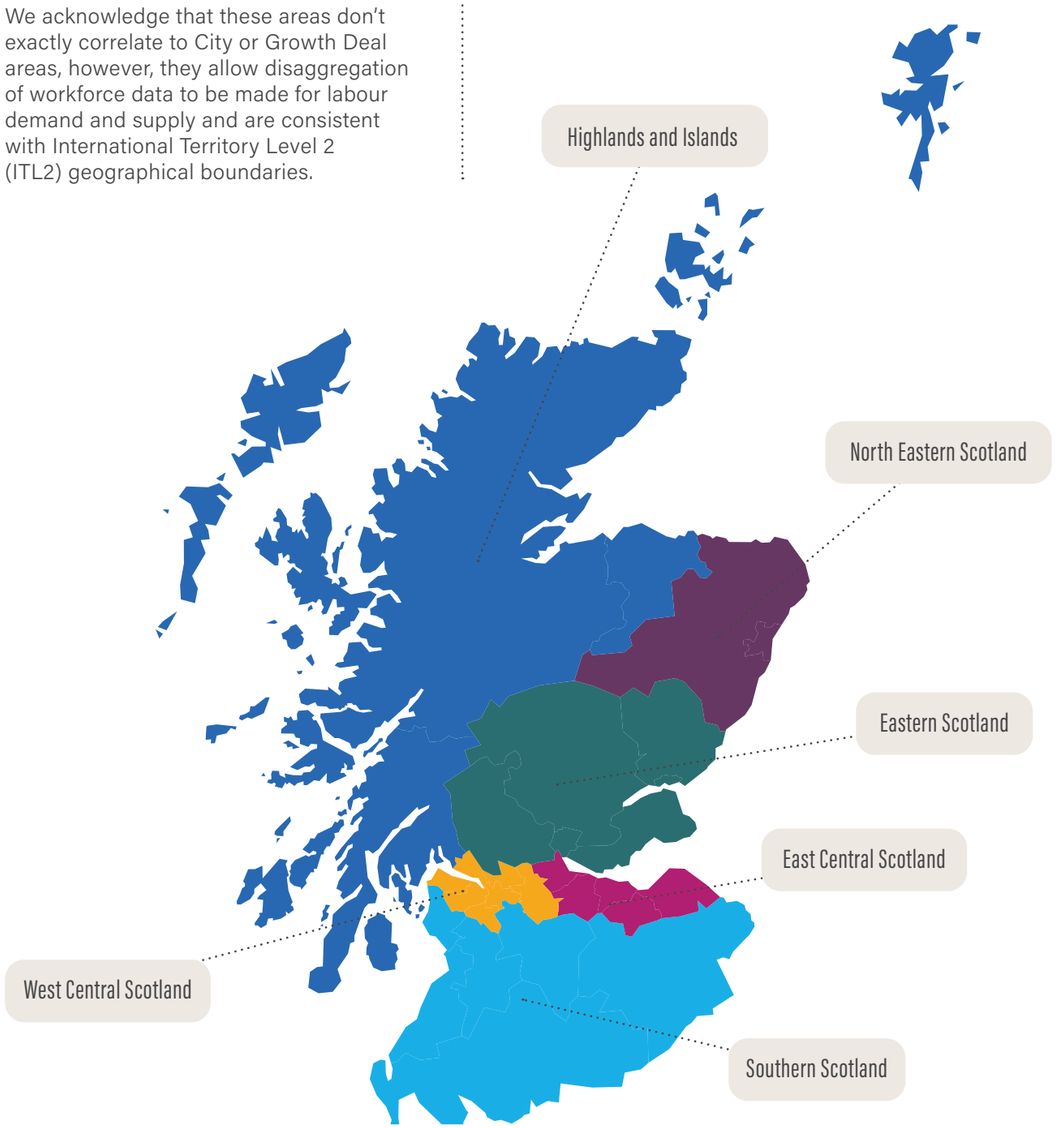


Figure 1: Local areas, Scotland

Previous reports highlighted the challenges faced by the construction industry such as, dealing with the impact of Covid-19, conflict in Ukraine, raw material supply and inflation. In 2026, the macro-economy continues to be challenging with conflict in the Middle East impacting oil prices and global trade. This means that the construction industry in Scotland is again facing a period of economic uncertainty and low growth over the next 6-18 months.

In our latest forecast for construction, we are forecasting relatively low levels of growth in construction output, an average of 1.7% per year over the next five years, with a drop in output during 2026[1]. This level of output growth will result in the construction workforce increasing by an average annual growth rate of 0.3% over the next five years.

This local skills report looks at how future demand for construction workers over 2026-2030 compares to where construction workers were in 2025, assessing against recent trends in job vacancy data and CITB's latest workforce mobility report[2]. The report then reviews the gap analysis, considering how demand and supply has evolved since 2023.

The report also outlines a scenario for the impact of the planned £100bn investment in renewable energy generation, transmission and distribution for the Highlands and Islands set out in Workforce North[3].

When comparing future demand with the number of workers available today, it is important to remember that many construction employers already struggle to recruit the workers they need. The industry still has an underlying challenge to recruit the workers it needs as companies struggle to fill job vacancies and there is a general, longer-term challenge around the number of working age people available for the labour market in Scotland[4].

It is therefore important that the construction industry works collaboratively with stakeholders, government, trade associations and the like to promote the career opportunities that are on offer to as wide a potential workforce as possible to ensure that future vacancies can be filled.

[1] CITB (2026) Construction Workforce Outlook – Scotland 2026-20302
[2] CITB (2026) Workforce Mobility and Skills in the Construction Sector 2025 – Scotland Regional report
[3] Skills Development Scotland (2025) Workforce North: A shared mission to grow and expand our workforce
[3] National Records of Scotland (2026) Projected Population of Scotland: 2024-based



3. Labour demand in Scotland

This section outlines the combined labour demand from the six areas in Scotland, with the individual analysis for each included in the accompanying technical report.

The methodology for the demand analysis is consistent with the approach used in the 2018 and 2023 local skills reports. Labour demand is based on the known pipeline of construction projects from published sources such as Glenigan[5] and Scottish Futures Trust, supplemented with estimates of other work taking place.

3.1 Pipeline of projects

We have analysed projects in the Glenigan database[6] and, where required, updated that list with any supplementary information that was available.

Table 1 looks at the full range of construction projects identified, showing the number of projects for each area, their total value and the number of projects that would be classed as being significant, i.e., those with a value above the mean for each local area.

The areas identified with the most projects and largest total project value are East Central Scotland and West Central Scotland, which is consistent with the previous report. The relationship between all projects and those identified as being significant for each local area is also consistent with the previous reports. Overall, significant projects account for around 20% of the number of projects taking place in each area and over 80% of the total project value.

Table 1: Key data for projects by local area in Scotland, (total project pipeline)

AREA	NUMBER OF PROJECTS		PROJECT VALUE (£M, 2025 VALUES)	
	All	Significant	All	Significant
East Central Scotland	538	135	£10,541	£8,653
Eastern Scotland	514	106	£5,145	£4,072
Highlands and Islands	506	98	£4,271	£3,618
North Eastern Scotland	309	45	£3,499	£2,504
Southern Scotland	426	74	£4,568	£3,713
West Central Scotland	564	150	£6,623	£5,573
TOTAL WORK	**2,857**	**608**	**£34,647**	**£28,133**

[5] https://www.glenigan.com/
[6] The Glenigan database allows contractors to identify leads and to carry out construction market analysis. For the purposes of this analysis, we have used the Q1 2026 cut of data.

Table 2 shows the types of new construction projects planned for 2026. New housing accounts for the largest share of planned spending (31%), followed by infrastructure projects (27%). Housing and infrastructure have been the biggest areas of construction activity in Scotland in recent years, and we expect this to continue. Infrastructure is forecast to be the largest area of new construction work in the years ahead.

Table 2: New-build construction spend by project type in 2026 (defined, known project pipeline)

PROJECT TYPE	SPEND IN 2026 (2025 VALUES - £M)	% OF TOTAL
New housing	£2,904	31%
Infrastructure	£2,489	27%
Public non-housing	£1,837	20%
Commercial	£1,363	15%
Industrial	£793	8%
TOTAL	**£9,386**	

% Values may not sum to 100% due to rounding

3.2 Estimate of labour demand

By looking at where future construction projects are planned across Scotland, we can estimate how many workers will be needed in different areas. This is shown in Figure 2 illustrating that the main areas of demand are similar to those identified in the previous report, i.e. West Central and East Central.

As these are the main population areas within Scotland it's not surprising that they remain the main areas where construction work is taking place and therefore have the highest levels of workforce demand.

Figure 2: Average labour demand by local area, Scotland, 2026-2030





3.3 Average labour demand by local area 2026-2030

A workforce breakdown for demand across the main occupational groups by local area is shown in Table 3. This breakdown takes account of known work identified from the pipeline analysis along with estimates of other new build and repair, maintenance and improvement work. The workforce breakdown is like previous reports with 50% of labour demand coming from skilled trade occupations.

Table 3: Construction labour demand by local area, Scotland, 2026-2030

OCCUPATIONAL GROUP	EAST CENTRAL	EASTERN	HIGHLANDS AND ISLANDS	NORTH EASTERN	SOUTHERN	WEST CENTRAL	TOTAL
Construction Managers and Supervisors	6,000	2,810	2,300	2,110	4,060	7,960	25,240
Construction Professional/Technical	8,320	3,790	2,990	2,640	5,260	10,000	33,000
Labourers and Groundworkers	3,080	1,480	1,260	1,260	2,220	4,600	13,890
Non-construction trades	710	340	270	260	450	920	2,950
Skilled trades - bricklaying	1,310	540	370	310	600	1,210	4,340
Skilled trades - electrical	3,430	1,610	1,250	1,060	2,090	4,230	13,660
Skilled trades - other occupations	8,520	4,110	3,300	3,260	5,770	11,760	36,720
Skilled trades - painting and decorating	1,200	570	420	370	680	1,420	4,660
Skilled trades - plumbing and HVAC	2,110	980	700	580	1,080	2,240	7,690
Skilled trades - wood occupations	4,940	2,300	1,600	1,440	2,450	5,060	17,790
Support staff - office based	8,960	4,200	3,320	3,010	5,740	11,380	36,610
TOTAL	**48,580**	**22,730**	**17,780**	**16,290**	**30,390**	**60,770**	**196,550**

Values may not sum to totals due to rounding.

4. Workforce supply

We have identified the construction workforce supply by using the Industry of Employment variable in the Annual Population Survey from the Office for National Statistics.

By using data from this variable and applying it to the industry workforce figures in the Construction Workforce Outlook report, we can take a view on the construction workforce supply that is in each of the six areas.

In our analysis we have used the average workforce distribution in local areas from 2023 to 2025 and applied this to the 2025 workforce figures from the Construction Workforce Outlook.

4.1 Business distribution

We have found that the construction workforce has tended to have a relationship with the number and location of construction businesses and Table 4 shows how the current view compares to the previous report.

- An increase in the number of registered businesses, up to 22,790 from 21,765[7]
- This increase has been in the number of micro and small sized businesses
- The pattern of business distribution across Scotland by area has remained the same.

Table 4: Construction business distribution, Scotland

BUSINESS DISTRIBUTION	2025	2023
East Central	17%	17%
Eastern	17%	17%
Highlands and Islands	13%	13%
North Eastern	10%	10%
Southern	19%	19%
West Central	24%	24%

This indicates a very stable pattern of construction business distribution across Scotland.

[7] ONS, UK Business Counts, Scotland, F-Construction industry (from NOMIS, May 2026)

4.2 Workforce location by area

While the number of businesses has increased, there has been a decrease in the total construction workforce from 202,750 in 2023, down to 196,510 in 2025[8]. Table 5 shows that the distribution of the workforce by local areas has only changed very slightly.

Construction workers tend to be based in Scotland's most populated areas. West Central, Southern and East Central Scotland have the largest numbers of workers.

Looking within the six areas by the main types of construction occupations, the workforce supply breakdown is shown in Table 6.

Table 5: Workforce location by local area, Scotland, 2025 vs 2023

AREA	2025		2023	
	Share	Workforce	Share	Workforce
East Central	17%	34,380	18%	36,310
Eastern	17%	33,470	17%	33,970
Highlands and Islands	12%	23,730	13%	26,280
North Eastern	9%	16,990	8%	16,180
Southern	19%	37,510	20%	41,060
West Central	26%	50,420	24%	48,950
TOTAL		**196,510**		**202,750**

Table 6: Workforce breakdown by local area, Scotland

OCCUPATIONAL GROUP	EAST CENTRAL	EASTERN	HIGHLANDS AND ISLANDS	NORTH EASTERN	SOUTHERN	WEST CENTRAL	TOTAL
Construction Managers and Supervisors	4,440	4,320	3,070	2,200	4,850	6,510	25,390
Construction Professional/Technical	5,950	5,790	4,110	2,940	6,490	8,720	34,000
Labourers and Groundworkers	2,370	2,310	1,630	1,170	2,580	3,470	13,530
Non-construction trades	520	500	360	260	570	760	2,970
Skilled trades - bricklaying	840	820	580	420	920	1,240	4,820
Skilled trades - electrical	2,290	2,230	1,580	1,130	2,500	3,360	13,090
Skilled trades - other occupations	6,400	6,240	4,420	3,170	6,990	9,390	36,610
Skilled trades - painting and decorating	760	740	530	380	830	1,120	4,360
Skilled trades - plumbing and HVAC	1,310	1,270	900	650	1,430	1,920	7,480
Skilled trades - wood occupations	3,080	3,000	2,130	1,520	3,370	4,520	17,620
Support staff - office based	6,410	6,240	4,420	3,170	6,990	9,400	36,630
TOTAL	**34,380**	**33,470**	**23,730**	**16,990**	**37,510**	**50,420**	**196,500**

Values may not sum to totals due to rounding.

4.3 Construction job vacancies

Figures below illustrate the recent trends in online job vacancy postings for construction occupations in each of the local areas of Scotland from January 2021 to June 2026[9]. This is shown as an Index, comparing average quarterly number of postings against figures for Jan 2021 (Index = 100), to allow comparison of local areas.

Figure 3 shows the overall index view for Scotland with an increase in job vacancies picking up in 2021 and 2022, then increasing strongly in 2023. Vacancy postings reduced in the second half of 2023 and between 2024 to 2026, have stayed at just above the level they were at the start of 2021.

Figure 3: Index of online job vacancy postings, Scotland

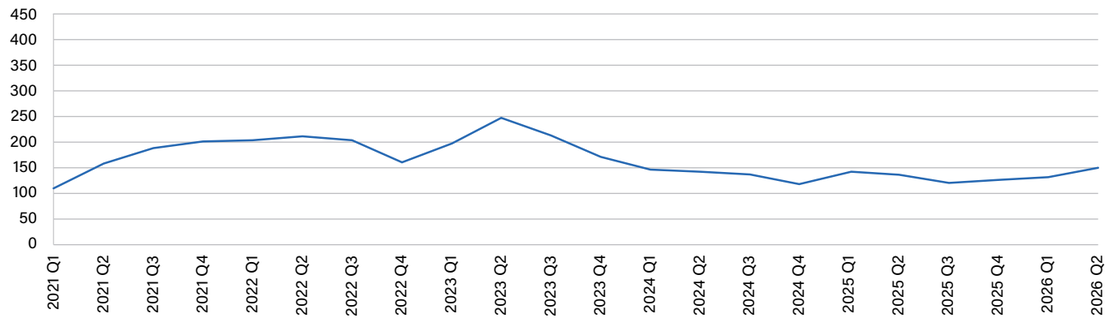
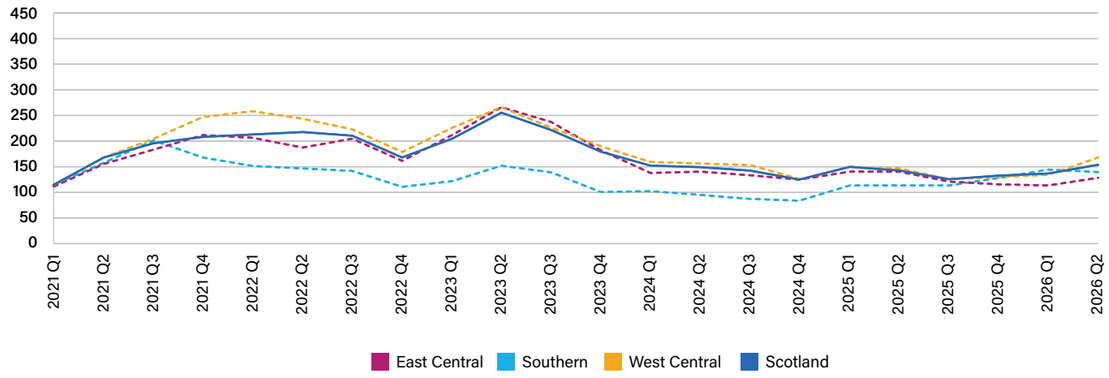


Figure 4 overlays the vacancy postings in Scotland against East Central, Southern and West Central areas. Job vacancy postings in the East Central and West Central areas closely follow the pattern for Scotland, showing no significant differences in trends.

Online vacancy postings for the Southern area of Scotland consistently sits below the overall Scotland trend, indicating a slightly weaker level of job vacancy postings, even though it follows a similar pattern.

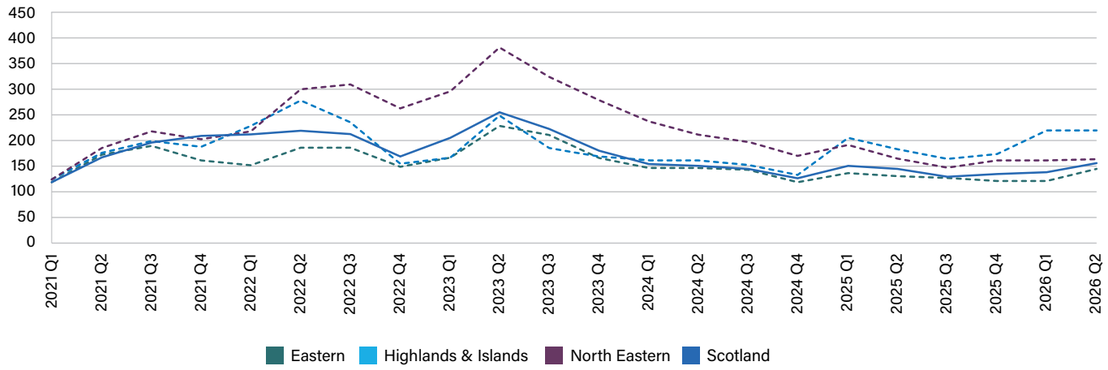
Figure 4: Index of online job vacancy postings, Scotland and selected local areas



[8] CITB, Construction Workforce Outlook 2026-2030: Scotland
[9] Lightcast, online job vacancy postings, selected occupations linked to construction worK

In comparison, Figure 5 shows the same view for the Eastern, Highlands and Islands, and North Eastern areas. There is a similar pattern when it comes to the timing of peaks and troughs, however, vacancy levels have been higher in the North Eastern area since 2022 and more recently in the Highlands and Islands from 2025.

Figure 5: Index of online job vacancy postings, Scotland and selected local areas



The pattern of vacancies across the local areas highlights two main points. Firstly, there is variation across Scotland for vacancies being posted with more pressure in the North Eastern area and more recently, in the Highlands and Islands area.

Secondly, although there is variation, all areas have seen the number of vacancies posted reduce from peak levels seen in 2023, levelling off in most areas between 2024-2026. This also reflects anecdotal feedback from companies about workloads and general difficulty in recruiting workers.

4.4 Workforce mobility

The latest research on the workforce mobility[10] of construction workers in Scotland shows that:

- 99% of construction workers currently live and work in Scotland
- 58% have worked in Scotland for their entire career, higher than the figure of 41% for having worked in the same region across other areas of the UK
- Scotland's workers are more likely to be directly employed when compared to other regions of the UK (82% v 59%), and less likely to be employed on a temporary basis (12% v 29%)
- The average furthest distance travelled by construction workers in Scotland is 41 miles, slightly less than the UK region average of 44 miles
- The mean distance from a workers' home to their current site is 15 miles, slightly less than the UK (21 miles)
- 40% of workers have spent significant periods of time on one type of construction work. While this is comparable with the UK figure (40%), it is an increase compared to previous results (Scotland 2022: 27%).

This highlights that the Scottish construction workforce is drawn from within Scotland, and tends to stay within Scotland, which is positive when it comes to workforce supply.

However, although people will move around Scotland for work, this latest research indicates that the average travel distance for workers is less than other regions of the UK. Scotland's construction workforce's tendency to move between work in different sectors, has reduced in 2025. These points could affect how the supply of workers respond to future demand both in terms of how far workers are prepared to travel and for the type of construction work they are looking to be involved with.

[10] CITB (2026) Workforce Mobility and Skills in the UK Construction Sector 2025 – Scotland Regional Report

5. Gap analysis

By comparing workforce supply against labour demand, we can take a view on the potential gaps between the number of workers in an area and the future demand for work. This has been carried out by comparing workforce supply in each area for 2025 against the average demand between 2026-2030, broken down by main occupational groups.

There is some variation when the gap between supply and demand is examined by local areas, as shown in Table 7. In four of the local areas there is more supply than demand (Green shading) while in the other two areas there is a gap (Red shading).

Table 7: Gap analysis breakdown by local area, Scotland

OCCUPATIONAL GROUP	EAST CENTRAL	EASTERN	HIGHLANDS AND ISLANDS	NORTH EASTERN	SOUTHERN	WEST CENTRAL	TOTAL
Construction Managers and Supervisors	-1,560	1,510	770	90	790	-1,450	150
Construction Professional/Technical	-2,370	2,000	1,120	300	1,230	-1,280	1,000
Labourers and Groundworkers	-710	830	370	-90	360	-1,130	-350
Non-construction trades	-190	160	90	-	120	-160	10
Skilled trades - bricklaying	-470	280	210	110	320	30	480
Skilled trades - electrical	-1,140	620	330	70	410	-870	-570
Skilled trades - other occupations	-2,120	2,130	1,120	-90	1,220	-2,370	-110
Skilled trades - painting and decorating	-440	170	110	10	150	-300	-300
Skilled trades - plumbing and HVAC	-800	290	200	70	350	-320	-210
Skilled trades - wood occupations	-1,860	700	530	80	920	-540	-160
Support staff - office based	-2,550	2,040	1,100	160	1,250	-1,980	20
TOTAL	**-14,200**	**10,740**	**5,950**	**700**	**7,120**	**-10,350**	**-40**

Values may not sum to totals due to rounding.

The gaps shown on Table 7 are across all but one of the occupational groups in the two local areas identified as having a shortfall, indicating a general shortage of construction workers, rather than a particular occupational need. The local area with the largest gap is the East Central area where supply of 34,380 is well short of the demand figure of 48,580.

The main point to be drawn from the gap analysis is that while the construction industry has the overall workforce to deliver work in the coming years, the demand won't necessarily be met by workers living in the same area, especially in the East Central and West Central areas.

This pattern has been consistently highlighted in previous reports (2018 and 2023), with the East Central area having a significant shortfall between supply and demand. In this area, most demand is focused in and around the City of Edinburgh and we assume the shortfall is being met by workers travelling in from adjacent areas. Although the gap analysis has consistently identified a shortfall, there hasn't been a stronger surge in online job vacancies for the area, which indicates that the need for workers is in part being met.

6. Scenario: Highlands and Islands, Workforce North

The supply, demand and gap analysis outlined accounts for projects with committed spending and a degree of certainty about location and when work will happen. When preparing this view, we are aware that there is a very large potential pipeline of infrastructure activity proposed for the Highlands and Islands, with a report published by Highlands and Islands Enterprise (HIE) indicating that there could be an additional £100bn of infrastructure activity[11].

As this investment did not appear to be reflected in the project information used to support the demand view, we have included an assessment of potential impact as a scenario, based on estimated construction output that the investment would deliver. Table 8 lists the estimated construction spend in each type of infrastructure activity identified in Workforce North[12], isolating the construction activity from the manufacturing or engineering construction component. These investment values were then used to estimate the average workforce demand between 2026-2030 based on the assumption that work activity would happen from 2027 onwards.

Table 8: Construction spend estimates for Highlands and Islands pipeline

SECTOR	VALUE (£M)
Offshore wind	8,116
Supporting infrastructure: grid	5,000
Pumped storage hydro	5,260
Green hydrogen	3,640
Other RTOs and supporting infrastructure: enablers	3,776
Onshore wind	1,089
Marine energy	1,144
TOTAL	**28,025**

[11] https://www.hie.co.uk/media/svoh1nxy/regional-transformational-opportunities-in-the-highlands-and-islands-report-may-2025.pd
[12] Skills Development Scotland (2025) Workforce North: A shared mission to grow and expand our workforce

The demand impact is significant, not only for the workforce in the Highlands and Islands, but for Scotland overall. The workforce demand in the Highlands and Islands would more than double, resulting in a 12% increase in Scotland's construction workforce demand.

Figure 6 shows how this would change the pattern of workforce demand by area in Scotland, taking the Highlands and Islands close to the workforce demand forecast for the East Central area. This level of work would be a major structural change for the make-up of the construction industry in Scotland.

AREA	BASELINE DEMAND (AVG 2026-2030)	BASELINE + SCENARIO (AVG 2026-2030)
Highlands and Islands	17,780	41,180
Scotland (Total)	196,550	219,940

Figure 6: Average labour demand by local area, Scenario, Scotland, 2026-2030

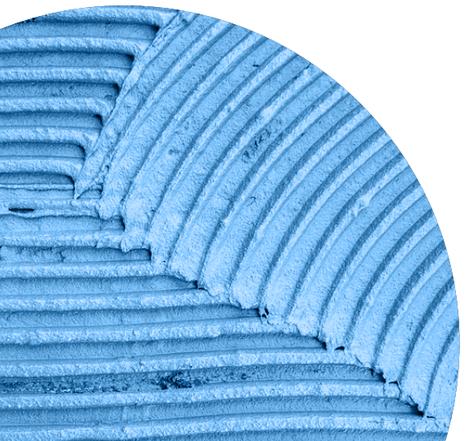


Table 9 shows the impact of the scenario on the gap analysis by area with the Highlands and Islands having the highest gap and the impact being more in the range of trades picked up in the other occupations category rather than trades such as bricklaying, electrical installation or painting and decorating. The table also highlights the change for Scotland with nearly all occupational groups now showing a gap.

Table 9: Scenario Gap analysis breakdown by local area, Scotland

OCCUPATIONAL GROUP	EAST CENTRAL	EASTERN	HIGHLANDS AND ISLANDS	NORTH EASTERN	SOUTHERN	WEST CENTRAL	TOTAL
Construction Managers and Supervisors	-1,560	1,510	-2,430	90	790	-1,450	-3,050
Construction Professional/Technical	2,370	2,000	-3,280	300	1,230	-1,280	-3,400
Labourers and Groundworkers	-710	830	-1,030	-90	360	-1,130	-1,760
Non-construction trades	-190	160	-410	-	120	-160	-490
Skilled trades - bricklaying	-470	280	10	110	320	30	280
Skilled trades - electrical	-1,140	620	30	70	410	-870	-880
Skilled trades - other occupations	-2,120	2,130	-5,880	-90	1,220	-2,370	-7,110
Skilled trades - painting and decorating	-440	170	10	10	150	-300	-400
Skilled trades - plumbing and HVAC	-800	290	-100	70	350	-320	-510
Skilled trades - wood occupations	-1,860	700	-1,670	80	920	-540	-2,360
Support staff - office based	-2,550	2,040	-2,700	160	1,250	-1,980	-3,780
TOTAL	**-14,200**	**10,740**	**-17,450**	**700**	**7,120**	**-10,350**	**-23,430**

Values may not sum to totals due to rounding.



7. Conclusions and recommendations

Although the demand, supply and gap analysis carried out for this and earlier reports isn't identical due to changes to how local areas in Scotland are defined, there are still some consistent patterns that have emerged when looking at workforce demand and supply, set alongside trends in job vacancy postings and workforce mobility.

The analysis shows that Scotland is expected to have broadly sufficient construction workforce capacity to meet forecast demand between 2026 and 2030. However, workers are not necessarily based in the same areas as the construction work. East Central Scotland continues to show the largest shortfall between forecast demand and the locally available workforce, while West Central Scotland also shows a shortfall. These patterns have remained broadly consistent across successive Local Skills reports.

The location of construction businesses across Scotland has remained relatively stable, while there has been some change in where workers are based. This suggests that the workforce has adapted to changing patterns of construction demand. Movement between areas is helping to meet local demand, particularly in East Central and West Central Scotland, but this flexibility should not be taken for granted.

Scotland's construction workforce is largely drawn from people living in Scotland. Workers also tend to travel shorter distances than those in other parts of the UK, and the average distance travelled has reduced. This may limit how easily the existing workforce can respond if demand increases significantly in a particular location. Recruitment pressures in the North Eastern and Highlands and Islands areas also show that having enough workers overall does not necessarily mean employers can recruit the workers they need.

The proposed energy infrastructure investment in the Highlands and Islands could create a workforce challenge on a different scale. The timing and delivery of this investment remain uncertain, and it is therefore considered as a scenario rather than part of the main demand forecast. However, if the proposed work progresses as set out in published plans, construction workforce demand in the Highlands and Islands could more than double. This could increase total construction workforce demand across Scotland by around 12% and create additional demand across nearly all occupational groups.

Meeting future demand will require early coordination between investment plans, workforce development and training provision. As Scotland's construction workforce is largely drawn from within the country, suitable training provision will be important in developing the workers and skills required. Planning will also need to remain flexible and look beyond administrative boundaries, recognising that the timing and location of construction work will continue to change.



Recommendations

1. Plan early for the workforce needs associated with major investment

The potential scale of energy infrastructure investment in the Highlands and Islands makes early workforce planning essential as workforce development will take time.. Industry, government and other stakeholders should work together as plans develop to understand the likely workforce requirements and support construction employers in preparing for future demand.

2. Ensure training provision supports future workforce needs

Scotland needs suitable training provision to develop the workers and skills required across all areas. This will be particularly important if proposed energy infrastructure work progresses at pace and increases demand beyond the capacity of the existing workforce.

3. Continue to plan across local boundaries

Workforce and skills planning should recognise that construction workers and demand do not remain within fixed administrative areas. A collaborative approach across industry, government, training providers and other stakeholders will be needed to respond to changing patterns of work and support workforce development across Scotland.

The scenario modelling of workforce requirements in relation to the proposed energy and infrastructure investment in the Highlands and Islands highlights the importance of collaborative working. CITB will collaborate with key industry players such as the Civil Engineering Contractors Association (CECA) and the Scottish Plant Owners Association (SPOA), as well as with local agencies, to assist in helping deliver the construction skills and training requirements linked with the ambitions of the Highlands and Islands infrastructure plans.



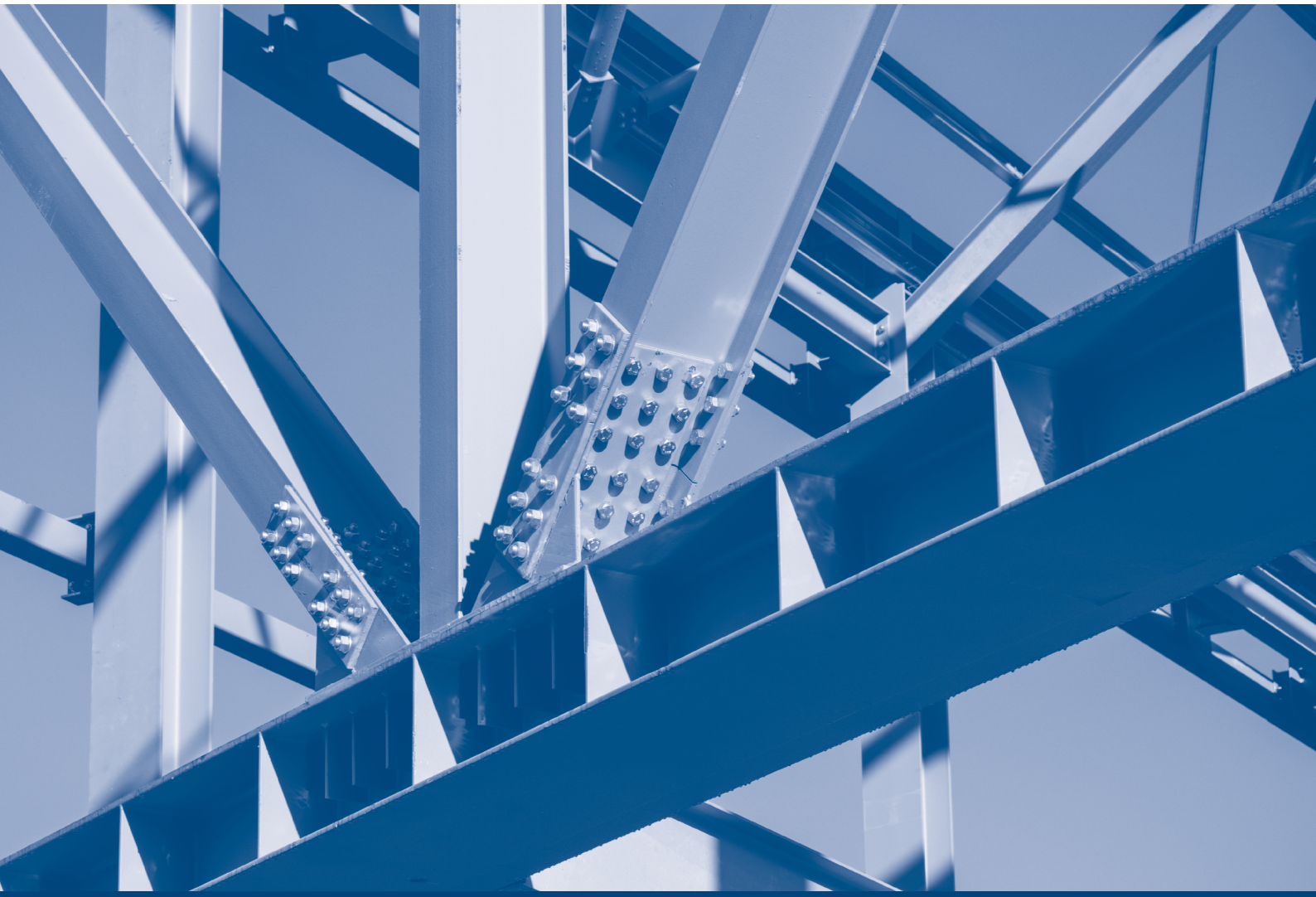
CITB's role and remit in relation to workforce planning and employer/learner support is captured within our 4-year GB Strategic Plan to 2029: CITB Strategic Plan. It sets out how CITB will support employers to recruit, train and retain the workforce they need, now and in the future. Within Scotland the CITB Scotland Nation Plan 2025-26 CITB Scotland Nation Plan outlines our plans and ambitions around delivering our three strategic pillars, namely that we will:

- **Inspire and enable diverse and skilled people into construction.** For example, we will continue to deliver Scottish Apprenticeships and support specialist occupations within our National Construction College
- **Develop a training and skills system to meet current and future needs**. For example, we will work closely with Scottish Government to evolve the skills and training system, with a focus on construction training provision and funding ensuring alignment with the reform of the Scottish skills system
- **Support the industry to train, develop and retain its workforce.** For example, we will ensure all National Occupational Standards, short duration standards, SVQs and apprenticeships in Scotland are up to date and fit for purpose.

Scotland's construction industry continues to deliver value to the economy during challenging times and is an important enabler of future growth. The homes, hospitals, schools, roads, water networks and energy grids that Scotland needs now and, in the future, requires construction workers to build and maintain them. Being able to continue to do that and deliver a built environment that is low carbon, energy efficient, sustainable and productive requires a workforce that is appropriately skilled and trained. Construction also must be an attractive workplace that offers development and rewarding careers to people looking to enter the industry. Meeting this workforce challenge isn't easy and requires a long-term commitment that must be facilitated by industry, government and stakeholders working in partnership, backed up with training infrastructure and skills plans to ensure that the workforce for the future is being developed today.

Authors
Ian Hill (CITB)
Ian Hughes (CITB)
Doug Forbes (WLC)
Jack Southgate (WLC)

Contact
ian.hill@citb.co.uk



The findings and conclusions set forth in this report represent the best professional judgment of CITB and Whole Life Consultants based on information made available to it at a point in time. The authors have relied on, and not independently verified, data provided to it by independent sources and sources of information cited in the report. We disclaim any responsibility to the client and others in respect of any matters outside the scope of the above. We accept no responsibility to third parties to whom this report, or any part thereof, is made available. Any such party relies upon the report at their own risk.

© Construction Industry Training Board (CITB)

2026 Copyright and all other intellectual property subsisting in these materials vest absolutely in CITB and should not be copied, reproduced nor passed to any third party without the prior written agreement of CITB.

Research materials are created using data and information provided to CITB by third parties and as such CITB cannot control or verify the accuracy of this data or information. Accordingly, CITB does not give any warranty about the accuracy or fitness for any particular purpose of these materials. Furthermore, these materials do not constitute advice and should not be used as the sole basis for any business decision and as such CITB shall not be liable for any decisions taken on the basis of the same.

You acknowledge that materials which use empirical data and/or statistical data and/or data modelling and/or forecasting techniques to provide indicative and/or predictive data cannot be taken as a guarantee of any particular result or outcome.

CITB
4 Cyrus Way
Cygnet Park, Hampton
Peterborough,
PE7 8HP+44 (0)344 994 4400
www.citb.co.uk

CITB is registered in England and Wales Charity No 264289 and in Scotland Charity No SC044875.

Whole Life Consultants Limited
Dundee University Incubator
James Lindsay Place
Dundee, DD1 5JJ
+44 (0)1382 224 304
enquiries@wlcuk.com

Whole Life Consultants Ltd is registered in Scotland as SC259987