Regional Skills Need Framework and Labour Analysis

September 2026

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1 Introduction

As per the Deed of Obligation agreed between East Suffolk Council, Suffolk County Council and Sizewell C Ltd, related investment will be utilised as a catalyst to create a skills legacy for the region and/or backfill in areas where regional need is exacerbated by the project. Determining a 'regional skills need' will inform the Annual Skills Implementation Plan (ASIP), a document which will translate the relevant Construction Workforce Delivery Strategies and regional skills requirements for that year into implementation activities and priorities. The regional skills need assessment will ensure priorities for funding expenditure are aligned with wider needs than the project itself. Ongoing monitoring will help develop our understanding over the course of the build.

1.1 Governance arrangements

The Regional Skills Need Framework (RSNF), Annual Skills Implementation Plan (ASIP) and Asset Skills Enhancement and Capability (ASEC) Fund operate through a linked governance process designed to ensure that skills investment decisions are evidence-led, transparent and aligned with identified regional need.

The ASIP is coordinated by the Regional Skills Co-ordination Function (RSCF), based within Suffolk County Council. The RSCF is responsible for maintaining the RSNF, undertaking Skills Need Assessments, gathering and analysing evidence, coordinating stakeholder engagement, and preparing recommendations for consideration through the agreed governance arrangements. In carrying out this role, the RSCF brings together labour market intelligence, workforce forecasting, employer insight and provider intelligence to support an evidence-based understanding of regional skills needs.

The Employment, Skills and Education Working Group (ESEWG) is responsible for reviewing the evidence presented through Skills Need Assessments, considering the implications for workforce development and skills investment, and agreeing the priorities to be reflected within the ASIP. Membership of ESEWG comprises representatives from Sizewell C, Suffolk County Council, East Suffolk Council and the Regional Skills Co-ordination Function. The group provides strategic oversight of the ASIP and supports the development of recommendations relating to skills investment and delivery priorities.

The Economic Review Group (ERG) is responsible for approving the ASIP and any associated investment decisions in accordance with the agreed governance arrangements. Membership comprises representatives from Sizewell C, Suffolk County Council and East Suffolk Council. This provides assurance that investment activity remains aligned with the objectives of the Deed of Obligation and wider regional priorities.

The Skills Delivery Group and Strategic Skills Forum support this process by providing provider and stakeholder intelligence relating to workforce demand, skills provision, training capacity and delivery challenges. Their insight helps ensure that the framework reflects both labour market evidence and operational considerations from across the regional skills system.

The relationship between the framework, planning and investment process is evidence-led. The RSNF establishes the evidence base and assessment methodology used to identify regional skills needs. Individual Skills Need Assessments are then undertaken to evaluate specific occupations, sectors or skillsets against the framework criteria. The findings from these assessments inform

the development of the ASIP, which translates identified priorities into implementation activity and potential investment opportunities. Where appropriate, the ASEC Fund supports interventions designed to address these priorities. The outcomes and impacts of funded activity are subsequently monitored and evaluated, with the findings informing future Skills Need Assessments, investment decisions and annual planning activity.

This approach ensures that investment decisions can be clearly traced back to identified need, helping to support transparency, accountability and the effective use of resources.

2 Regional Skills Need Assessment criteria

Regional skills needs can either relate to the need to:

1. **widen current talent pools** in broad areas to create a pipeline of skills that are either directly required themselves or provide the foundation skills to enable progression through to more specific requirements
2. **directly equip the workforce with specific and specialised skills** needed in roles where there will be a significant regional uplift required across projects and across time

A regional skills need is a set of skills and competencies (and its associated qualifications and professional certification) that can be evidenced as at least one of the following:

1. underpinning a Suffolk and regional strength or comparative, competitive advantage (as identified by current plans, priorities and stated local ambitions)
2. currently required and will continue to be required by multiple local employers (or required of the local supply chain by developments)
3. currently required by national employers that will be operating in Suffolk and the wider area for a significant period across multiple developments
4. supports the expansion of a relevant talent pool that is needed to fill general skills shortages and feed specific (often higher level) skills gaps
5. required to help mitigate against any negative impacts of significant replacement demand within the regional economy that can be linked back to the workforce requirements of Sizewell C

Evidence is also required to:

1. **confirm that delivery of the skillset aligns with the curriculum development** strategies or plans of at least one training provider or learning organisation based in the region. This assessment should mitigate against the risk of investing in provision, resources, equipment or facilities that cannot be supported in the long-term by our regional provider base
2. **confirm that the delivery cannot be supported locally at the scale or level likely to be required** without ASEC investment confirm that entry into the related provision will be accessible from current local pre- or post-16 education pathways

How the skillset contributes to local economic and social priorities should also be identified and evidenced. This could include, but is not limited to:

1. raising qualifications levels by providing clear pathways through to Level 3+
2. raising aspiration and ambition levels of local residents
3. supporting the adoption of new technology and methods in related sectors across the economy
4. addressing areas of deprivation and increasing levels of social mobility
5. addressing geographical inequality in education provision

6. improving wage levels and regional productivity
7. supporting the participation and inclusion of disadvantaged or under-represented groups or those with specific barriers to education and employment

Evidence must be provided by all ASEC applicants but can also be contributed by any supporting stakeholder. This will be collated and collated by the RSCF and will be subject to assessment by the Regional Skills Need Framework to confirm the alignment between a skillset and the qualifying bullets above.

Each qualifying criteria must be confirmed by at least two pieces of evidence deemed to be acceptable by the ESEWG. Evidence can be provided to or collected by the RSCF at any time to ensure that the ASIP continues to refine its understanding of the regional skills need. Evidence submitted as part of applications for the ASEC fund will be reviewed at relevant stages of investment decision making processes to ensure it remains relevant and accurate.

Evidence could include, but is not limited to, the following:

1. Data on the current supply (relevant achievements, training availability) and demand (job postings, hard-to-fill vacancies etc)
2. Data-led forecasts on future supply and demand
3. Need referenced and evidenced in other reports deemed to be credible by ESEWG
4. Information provided by multiple key stakeholders including the thematic groups.

A skillset is not a regional need if no other significant current or future requirement for the skillset can be evidenced beyond the needs of the Sizewell C project.

3 Methodology

The Regional Skills Needs Assessment Framework operates through a three-stage model consisting of Evidence, Decision and Impact. Together these stages provide a continuous cycle that supports skills planning, investment and evaluation.

Stage 1 – Evidence

The first stage establishes an evidence-based assessment of both workforce demand and training supply for a particular skillset. Each assessment begins by defining the occupation or skillset using recognised occupational classifications and then reviewing multiple sources of labour market intelligence, workforce forecasting and employer evidence.

Demand assessments draw upon:

- Labour market intelligence and vacancy data.
- Workforce forecasts and project intelligence.
- National, sectoral and regional evidence sources.
- Employer and stakeholder intelligence.
- Sizewell C workforce information and Construction Workforce Delivery Strategies.

Supply assessments consider:

- Existing training pathways.
- Local and regional provider capability.
- Availability of specialist facilities and equipment.
- Delivery capacity and geographic coverage.
- Barriers affecting provision and workforce development.

Demand and supply are assessed independently before being brought together through a consistent demand versus supply framework. This produces a prioritisation rating which provides an initial indication of whether intervention may be required.

Stage 2 – Decision

The second stage ensures that evidence is translated into action. Skills Need Assessments are used to inform strategic planning and funding decisions, particularly those relating to the Asset Skills Enhancement and Capability (ASEC) Fund.

Where investment proposals are submitted, they are assessed against the evidence produced through Stage 1. This enables decision-makers to determine whether a proposed intervention aligns with an identified regional need, whether additional evidence is required, and whether the proposed activity is likely to address a recognised skills gap.

This approach provides a clear and transparent link between identified need and funding decisions, ensuring that investment is targeted towards areas where it can deliver the greatest impact.

Stage 3 – Impact

The final stage focuses on monitoring and evaluation. Rather than ending at the point of investment, the framework will assess whether funded interventions successfully increase training capacity, strengthen skills provision and improve workforce outcomes.

This includes monitoring:

- Delivery against funded activities.
- Growth in learner participation and completions.
- Increases in training capacity.
- Progression into employment or further training.
- Changes in the demand versus supply position over time.

Findings from this stage are used to refine future Skills Need Assessments, investment priorities and delivery interventions, creating a cycle of continuous improvement.

4 Regional economic and social context

4.1 The East of England

The East of England remains one of the UK's strongest economic regions, characterised by high levels of productivity, a significant concentration of knowledge-intensive industries, and nationally important assets in life sciences, clean energy, advanced manufacturing, logistics, and agri-tech. The region generates more than £200 billion in annual GVA and continues to outperform the national average on measures of business innovation and research investment. However, economic success is unevenly distributed, with persistent deprivation in some coastal, rural and urban communities, alongside marked differences in access to employment, skills provision and transport infrastructure.

Suffolk operates within a highly interconnected East of England labour market. Workers frequently travel between Suffolk, Norfolk, Essex, Cambridgeshire and beyond, whilst employers recruit across administrative boundaries. This is particularly evident within construction, engineering, logistics, energy, health and social care occupations.

Labour market conditions remain relatively strong, but employers continue to report recruitment difficulties across a range of technical and professional occupations. An ageing workforce is a growing concern in several sectors, particularly engineering, construction, logistics, energy, health and social care, where replacement demand is expected to be as significant as growth demand over the coming decade. Skills shortages are increasingly driven not only by insufficient numbers entering key occupations, but also by competition between major employers and infrastructure projects drawing from the same labour pool. The concentration of major infrastructure projects across the region is expected to place increasing pressure on workforce supply and training capacity, reinforcing the importance of coordinated workforce planning and investment. The emerging East of England Infrastructure Skills Partnership has been established to support a more strategic regional approach to workforce forecasting, skills planning and provider collaboration.

The East of England is central to the UK's clean energy transition and is expected to play an increasingly significant role in delivering national energy security and net-zero objectives. The region already hosts substantial offshore wind capacity, with significant additional developments planned alongside major investments in nuclear, grid infrastructure and associated supply chains. These include Sizewell C, offshore wind developments, National Grid reinforcement projects, Freeport East and other major infrastructure schemes. While these projects provide considerable opportunities for economic growth and high-value employment, they are also expected to intensify demand for engineers, technicians, project managers and skilled construction workers. Workforce forecasts suggest that offshore wind employment demand alone will more than double across the region by 2030, creating substantial pressure on existing training and skills systems.

Educational attainment and progression into technical pathways remain areas of concern in parts of the region. Although participation in higher-level skills is strong around major economic centres, outcomes for disadvantaged learners continue to lag behind regional averages, particularly in some coastal and rural communities. Employers and providers also report challenges in meeting

growing demand for skills in digital technologies, artificial intelligence, advanced engineering and green industries. Ensuring that local residents can access emerging opportunities will require continued investment in technical education, apprenticeships and flexible workforce development provision.

Construction activity is expected to remain a major driver of employment demand. Alongside nationally significant infrastructure programmes, including Sizewell C, offshore wind developments, electricity network upgrades and transport investments, forecasts indicate sustained growth in regional construction output over the remainder of the decade. The principal challenge facing the sector is workforce capacity rather than project availability. CITB's Construction Workforce Outlook forecasts that the East of England will require approximately 4,140 additional construction workers each year between 2026 and 2030 to meet anticipated demand from planned construction activity and infrastructure investment. Particular shortages are expected in civil engineering, plant operations, supervisory roles and specialist technical occupations.

The logistics and freight sector continues to benefit from the region's strategic location, major ports, distribution networks and international gateways. However, employers continue to report recruitment challenges linked to an ageing workforce, changing technology requirements and shortages in driving, warehousing and supply chain management occupations. These pressures are likely to increase as automation, digitalisation and decarbonisation reshape workforce requirements across the sector.

Overall, the East of England is well positioned to support national economic growth, clean energy ambitions and infrastructure delivery. However, the scale and timing of planned investment means that workforce and skills constraints are increasingly becoming a limiting factor. While the region benefits from a strong economic base and an extensive skills network, it continues to face challenges relating to an ageing workforce, rural access to training, participation in technical education and competition for specialist skills. The key challenge for the region is therefore not generating demand, but ensuring sufficient capacity within education, training and employment pathways to meet future labour market needs while enabling local communities to benefit from emerging opportunities. Continued investment in technical, construction, engineering, digital and green skills provision will be critical to achieving this ambition.

4.2 Suffolk

Suffolk's economy is entering a period of significant transformation, driven by nationally important investment in clean energy, infrastructure, ports and logistics. The county has a long-term ambition to increase productivity, workforce participation and higher-level skills, recognising that future prosperity will depend on its ability to develop and retain a larger pool of skilled workers. While Suffolk benefits from relatively high employment levels, a strong business base and an attractive quality of life, productivity and skills attainment continue to lag behind national benchmarks, limiting the extent to which local residents and businesses can fully capitalise on emerging growth opportunities.

Economic and social outcomes also vary considerably across the county. Areas of persistent deprivation remain concentrated within parts of Ipswich and the former Waveney area, particularly

Lowestoft, where lower educational attainment, poorer health outcomes and reduced access to opportunities present ongoing barriers to economic inclusion. Rurality continues to create additional challenges, with transport connectivity, access to services and workforce mobility affecting both residents and employers. As a result, Suffolk's economic challenge is not simply one of growth, but ensuring that growth is inclusive and accessible across all communities.

The labour market remains relatively resilient, with unemployment levels remaining comparatively low. However, employers continue to report recruitment difficulties across a range of occupations and sectors. Demand remains strong in health and social care, education support, construction, logistics, engineering and technical occupations, while economic inactivity linked to long-term health conditions has become an increasingly significant workforce challenge. As in many parts of the East of England, an ageing workforce is creating additional replacement demand, particularly in sectors critical to public services and infrastructure delivery.

Suffolk's future growth prospects are increasingly shaped by its position at the centre of the UK's clean energy transition. Sizewell C, Freeport East, offshore wind developments, electricity network upgrades and wider net-zero investment programmes are creating unprecedented demand for construction, engineering, project management, logistics and technical skills. Importantly, many of the occupations required to deliver these projects are also those needed across the wider economy, increasing the potential for competition between sectors and employers. Current workforce planning activity therefore places considerable emphasis on understanding cumulative labour market demand and ensuring skills investments create lasting capability beyond individual projects.

These developments present a significant opportunity to improve productivity, create higher-value employment and strengthen Suffolk's long-term economic resilience. However, the scale of planned investment means that workforce shortages are increasingly becoming the key risk for delivery. Construction, engineering, transport and digital occupations feature prominently within local skills priorities, with employers highlighting the need for both new entrants and the upskilling of existing workers. The emphasis is therefore shifting from attracting investment towards ensuring sufficient workforce capacity exists to support and sustain it.

Young people continue to be a priority within Suffolk's skills agenda. While participation in education and training remains relatively strong overall, outcomes vary significantly between communities. Coastal and more deprived areas continue to experience greater challenges in progression and engagement than many rural and market-town areas. The county's response has increasingly focused on strengthening transitions between education and employment, improving careers pathways and creating clearer routes into sectors that offer long-term career opportunities.

Suffolk's skills challenge is therefore increasingly strategic rather than purely operational. The county is not only seeking to address immediate labour shortages, but also to build a workforce capable of supporting long-term economic growth in clean energy, construction, advanced manufacturing, ports and logistics, health and care, and emerging technology sectors. Success will depend on sustained collaboration between employers, skills providers, local authorities and regional partners to align investment, training provision and workforce planning with evolving labour market demand.

4.3 NSIPs and other projects

The East of England continues to experience significant infrastructure-led growth, with workforce demand being generated by Sizewell C alongside a broad pipeline of major infrastructure and development projects. With more than thirty Nationally Significant Infrastructure Projects (NSIPs) planned or under development across the region, there is increasing competition for labour, training capacity and specialist skills. These pressures are compounded by wider national challenges, including shortages in key occupations, an ageing workforce and fragmented supply chains. No single project or organisation can address these issues in isolation, requiring a more coordinated regional approach to workforce planning and skills development.

As a result, the Regional Skills Co-ordination Function (RSCF) will continue to broaden its understanding of workforce demand beyond Sizewell C, incorporating intelligence from major infrastructure projects, regional partners and emerging initiatives such as the East of England Infrastructure Skills Partnership. The proposed partnership brings together Skills England, major infrastructure projects, skills providers, local authorities and other stakeholders to develop a shared understanding of workforce demand, identify priority skills challenges and support more coordinated regional responses.

The Regional Skills Needs Assessment Framework recognises that Sizewell C operates within a wider regional labour market and skills system. Workforce demand arising from Sizewell C must therefore be considered alongside demand generated by other infrastructure and growth projects, including energy, water, transport, housing and industrial developments. Regional Skills Need Assessments will consider both project-specific requirements and cumulative regional demand, allowing interventions and investment decisions to be targeted where pressures on workforce supply are likely to be greatest. This approach helps ensure that skills investment supports both Project delivery and wider regional workforce resilience.

The East of England Infrastructure Skills Partnership, led by Skills England alongside the Construction Technical Excellence College for the East of England, is expected to play an increasingly important role in supporting this work by enabling a single regional view of future workforce demand, identifying common skills pressures, mapping training provision and highlighting opportunities for collaborative action. Over time, this may support shared workforce forecasting, co-investment in skills provision, stronger progression pathways and improved coordination between infrastructure projects and the skills system.

The Regional Skills Needs Assessment Framework will continue to provide the process for assessing the implications of these developments through Skills Need Assessments, labour market intelligence, workforce forecasting and stakeholder engagement, helping to identify areas where coordinated regional intervention may be required and ensuring that Suffolk's priorities are reflected within wider regional planning and investment activity.

5 Skills infrastructure

Understanding the existing skills infrastructure is essential for making informed decisions about skills investment, workforce development and training delivery. The Regional Skills Needs Assessment Framework (RSNAF) considers not only workforce demand, but also the capacity, capability and resilience of the education and training system responsible for meeting that demand. This includes further education (FE), higher education (HE), independent training providers, specialist industry provision and cross-county delivery arrangements.

The East of England faces increasing competition for skilled labour as major infrastructure, energy, housing, transport and water projects progress simultaneously. As a result, workforce challenges can no longer be considered solely within local authority boundaries. Planning for future workforce demand requires a regional understanding of provision, capacity and specialisms, alongside a coordinated approach to investment and delivery.

The Regional Skills Co-ordination Function (RSCF), supported by the Skills Delivery Group and Strategic Skills Forum, will continue to use Skills Need Assessments, workforce forecasting and provider engagement to identify where additional capacity, curriculum development or infrastructure investment may be required to support both Sizewell C and wider regional growth.

5.1 Devolution and future skills infrastructure

The policy landscape for skills will continue to evolve as national and local decisions are taken as to how devolution and local government reform are to be taken forward in the local area.

During 2025, the Government progressed plans for a Norfolk and Suffolk Combined County Authority, with devolved powers intended to support greater local influence over skills, transport, housing and economic development. The proposed arrangements include strategic responsibilities relating to adult skills, economic growth and workforce development but are subject to further local decisions being reached before plans are progressed.

Whilst the future arrangements continue to develop, the Regional Skills Co-ordination Function will continue to monitor developments and seek to ensure that the priorities identified through the Regional Skills Needs Assessment Framework are reflected within any emerging regional structures and investment programmes.

5.2 Suffolk's FE and HE institutions

Suffolk benefits from a high performing, diverse and collaborative network of colleges and higher education providers. Collectively, these institutions provide the foundation for workforce development across construction, engineering, manufacturing, digital, health, logistics and energy-related sectors.

East Coast College

East Coast College provides significant technical provision across Lowestoft and Great Yarmouth. Its Energy Skills Centre and Civil Engineering and Construction Campus at Lound support training in clean energy, construction, engineering and infrastructure occupations. The college has worked closely with employers and major infrastructure projects, including Sizewell C, to develop provision aligned to regional workforce requirements. The Lound campus continues to expand its role as a specialist centre for civil engineering, construction and plant-related skills.

Suffolk New College

Suffolk New College delivers provision across Ipswich, Leiston, Halesworth and the Suffolk Rural campus. The college provides extensive technical pathways, including construction, engineering, digital, land-based and low-carbon skills. During 2025–26, Suffolk New College and Sizewell C strengthened their partnership through the development of the new College on the Coast initiative in Leiston, alongside proposals for an Apprenticeship and Trainee Hub and wider technical training facilities to support both Project and regional workforce needs.

West Suffolk College (part of Eastern Education Group)

West Suffolk College continues to play a leading role in construction, engineering, manufacturing and technical education across the region. In 2026, the college was designated as the East of England's Construction Technical Excellence College (CTEC), one of ten nationally recognised construction technical excellence colleges established to strengthen construction skills provision and support workforce demand across the UK. Through its hub-and-spoke delivery model, the college is expected to provide leadership, curriculum development and partnership working across the wider East of England skills system.

University of Suffolk

As Suffolk's principal higher education institution, the University of Suffolk continues to support workforce development through degree-level and higher technical qualifications aligned with regional priorities. The University's strengths in health, digital, engineering, business and innovation support both local employers and wider economic growth. Through partnerships with colleges and employers, it also provides important progression routes into higher-level skills and professional occupations.

Together, these institutions provide a strong platform from which to respond to emerging workforce demand, whilst continuing to support local residents, employers and regional growth.

5.3 Important Suffolk developments

Several significant developments are expected to strengthen Suffolk's future skills infrastructure and workforce capacity.

College on the Coast, Apprenticeship Hub and Centre of Excellence (Leiston)

Sizewell C announced detailed proposals for a new education campus in Leiston, developed in partnership with Suffolk New College. The proposal includes a permanent College on the Coast facility, an Apprenticeship and Trainee Hub supporting local apprenticeships, and a Centre of Excellence focused on construction, engineering, civil, mechanical and electrical skills. The development is intended to create a long-term skills legacy whilst supporting workforce requirements throughout construction. The proposed College on the Coast facility is planned to accommodate approximately 150 learners, alongside specialist learning and technical training facilities.

In addition, Suffolk New College has secured funding through the £7.8 million Asset Skills Enhancement and Capability (ASEC) Fund, provided by Sizewell C and managed by Suffolk County Council. The funding will support the expansion of high-quality training and education in areas including groundworks, civil engineering, technical higher education skills and driver training.

Suffolk New College Civil Engineering and Construction Skills Enhancement Project

Suffolk New College is expanding its specialist civil engineering and construction training offer through investment that will enhance provision in areas including groundworks, civil engineering, technical higher education and driver training. The project will help strengthen the pipeline of skilled local talent required for Sizewell C and other major infrastructure developments across the region, while creating additional opportunities for learners, apprentices and employers to access high-quality technical training.

Construction Technical Excellence College (CTEC)

West Suffolk College's designation as the East of England Construction Technical Excellence College represents a significant regional asset. Supported through Government investment, the initiative aims to strengthen construction training capacity, improve employer engagement and support the development of modern construction skills across the region. The programme is expected to support thousands of learners through collaboration with colleges, independent training providers and employers.

Clean Energy Technical Excellence College (CETEC)

Both Suffolk New College and East Coast College have been named as core delivery partners of the CETEC. Alongside Colchester Institute as the designated lead institution for the CETEC, as well as City College Norwich as a further core delivery partner, the colleges will collectively work

to actively engage with a wider network of education providers from across the East of England and nationally, to meet the growing demand for clean energy skills.

Aligned to major regional developments including offshore wind, nuclear, solar, domestic renewables and grid infrastructure, the CETEC will play a leading role in coordinating high-quality provision, supporting employers, and creating clear pathways into skilled, sustainable employment.

East Coast College Civil Engineering and Construction Campus

East Coast College continues to expand its specialist civil engineering and infrastructure offer through its Lound campus. Recent investment and support through the ASEC Fund will help to strengthen provision linked to civil engineering, construction and infrastructure delivery, supporting skills demand associated with Sizewell C and wider regional projects.

5.4 Independent training providers

Independent training providers remain a vital component of the regional skills system. They often provide specialist, flexible and industry-responsive training that complements the offer available through colleges and universities. Their ability to deliver short courses, apprenticeships, licence-based training and workforce upskilling programmes enables rapid responses to emerging workforce demand.

Key providers operating within or supporting Suffolk include:

- National Construction College (Bircham Newton), providing specialist construction, plant, lifting and safety training.
- Specialist lifting, access and safety training providers supporting infrastructure and energy projects.
- Apprenticeship and employability providers operating across construction, logistics, engineering and business sectors.
- Independent providers delivering niche technical training where local college capacity may be limited.

Independent providers are expected to play an increasingly important role in supporting construction, engineering, logistics, transport and infrastructure skills during the Sizewell C construction period and beyond.

5.5 Cross-county collaboration

Suffolk's skills system does not operate in isolation. Many learners travel across county boundaries to access specialist provision, whilst employers recruit from a wider labour market spanning Norfolk, Essex and Cambridgeshire.

Regional collaboration is becoming increasingly important as major infrastructure projects draw from overlapping labour pools and skills systems. Colleges and universities across the wider

region continue to provide complementary provision in construction, engineering, clean energy, digital, logistics, health and environmental technologies.

The emergence of the East of England Infrastructure Skills Partnership further reinforces the need for stronger provider collaboration, shared workforce intelligence and coordinated planning. Early priorities include the development of a regional workforce forecast, identification of priority skills gaps and mapping of provision across further education and training providers.

The RSCF will continue to maintain an overview of regional provision and workforce demand, supporting collaboration across institutions and helping ensure that ASEC and other skills investments are targeted towards areas of greatest need and potential impact. This will include considering both Suffolk-based provision and wider regional delivery models where these provide the most effective response to identified workforce challenges.

6 Annual labour market analysis

The Suffolk labour market has remained relatively resilient over the past year, despite wider economic uncertainty and ongoing recruitment pressures in several key sectors. Between July 2025 and June 2026, employers advertised 84,662 unique vacancies, equivalent to an average of 7,055 unique postings per month. While vacancy volumes remain below the exceptionally high levels seen in the post-pandemic recovery period, demand for labour continues to be strong across health and care, education, logistics, administration and business services.

Competition for workers remains a defining feature of the Suffolk labour market. Posting intensity continues to average around 2:1, indicating that many vacancies are advertised multiple times before being filled. This suggests that employers are still experiencing recruitment difficulties in a range of occupations, particularly those requiring specialist skills or where pay levels struggle to attract sufficient candidates.

The labour market continues to be shaped by Suffolk's economic structure. Health and social care remains a major source of demand, alongside logistics, professional services, retail, hospitality and education. Major infrastructure activity across the region, including energy and construction projects, continues to place additional pressure on the available workforce, particularly in technical and engineering occupations. Demand is therefore influenced not only by activity within Suffolk but also by labour market conditions across the wider East of England.

Advertised salaries have continued to rise over the past year, reaching a median advertised salary of £30,000, representing annual growth of 9.7%. This increase appears to reflect continued competition for labour rather than substantial growth in vacancy volumes, with employers increasingly using pay as a mechanism for attracting and retaining workers.

6.1 Occupations in highest demand

At a broad occupational level (2-digit SOC codes), the occupations generating the highest recruitment demand between July 2025 and June 2026 were:

- **Elementary administration and service occupations**: 9,290 unique postings.
- **Caring personal service occupations**: 6,926 unique postings.
- **Business and public service associate professionals**: 5,888 unique postings.
- **Business, media and public service professionals**: 5,513 unique postings.
- **Sales occupations**: 5,283 unique postings.

These patterns are broadly consistent with previous years and reflect the continued importance of care, business services, retail and customer-facing sectors within Suffolk's economy. Demand also remains strong for education professionals, transport operatives, administrative occupations and science, engineering and technical professionals.

At a more detailed level (4-digit SOC codes), the most heavily advertised occupations were:

- **Care workers and home carers**: 4,030 unique postings.
- **Cleaners and domestics**: 2,807 postings.

- **Sales-related occupations not elsewhere classified**: 2,374 postings.
- **Kitchen and catering assistants**: 1,913 postings.
- **Large goods vehicle drivers**: 1,824 postings.

Teaching assistants, chefs, retail managers, customer service occupations and warehouse operatives also featured prominently. Collectively, these occupations highlight the continued importance of foundational and intermediate skills within the Suffolk labour market, particularly in sectors that experience high levels of turnover and ongoing replacement demand.

6.2 Areas of growing demand

While vacancy growth has been uneven across sectors, several occupational areas continue to demonstrate strong and sustained recruitment activity.

Transport and logistics remains an important area of demand, reflecting Suffolk's strategic role in freight, warehousing and distribution. Large goods vehicle drivers, warehouse operatives, transport clerks and logistics-related occupations continue to feature prominently among advertised vacancies.

Education-related recruitment has also remained strong. Teaching assistants, special educational needs professionals, secondary teachers and childcare practitioners all feature among the most advertised occupations. This reflects both increasing learner needs and ongoing replacement demand across the education workforce.

Engineering and technical occupations remain significant contributors to labour demand, particularly mechanical engineers, civil engineers, production engineers and health and safety professionals. This is likely to reflect ongoing infrastructure investment and the growth of energy-related projects across the wider region.

6.3 Hard-to-fill roles

Recruitment difficulties remain concentrated in a number of occupations where employers experience persistent challenges in attracting and retaining workers.

Caring personal service occupations remain among the most difficult positions to recruit for. Despite being the second largest occupational category by volume, employers continue to advertise repeatedly for many care roles, reflecting national workforce shortages, an ageing population and competition from other sectors.

Education support roles, particularly teaching assistants and SEND-related positions, also continue to experience recruitment pressures. The increasing complexity of learner needs is contributing to growing demand across these occupations

Transport and logistics occupations, including large goods vehicle drivers and warehouse-related roles, continue to report recruitment challenges due to competition for skilled workers and high levels of labour mobility across the East of England.

Technical and engineering occupations remain difficult to fill, particularly where infrastructure projects create competition for specialist skills and experience. Occupations linked to construction, engineering and project delivery continue to command salary premiums and attract significant competition between employers.

6.4 Skills in demand

Employers continue to seek a combination of technical, operational and transferable skills.

The most commonly requested specialist skills during the year were:

- **Auditing** (4,166 postings)
- **Continuous improvement processes** (4,094)
- **Project management** (3,603)
- **Finance** (3,572)
- **Personal care** (3,273)
- **Warehousing** (3,183)

Demand for these skills reflects a labour market that increasingly values operational efficiency, compliance, project delivery and service quality. Strong demand for warehousing, personal care and food safety skills also highlights the continued strength of logistics and care sectors within the county.

The most frequently requested transferable skills were:

- **Communication** (30,654 postings)
- **Management** (14,591)
- **Customer service** (14,264)
- **Attention to detail** (12,854)
- **Operations** (9,380)
- **Leadership** (8,757)
- **Sales** (7,807)

These findings reinforce the importance of employability skills alongside technical competence. Employers continue to place significant value on communication, leadership, problem-solving and the ability to work effectively in customer-focused and operational environments.

6.5 Pay trends

Salary growth has continued throughout the year, with the median advertised salary reaching £30,000. This represents an annual increase of 9.7%, indicating sustained upward pressure on wages.

The increase in advertised salaries is likely to reflect ongoing labour shortages across several sectors rather than a substantial expansion in vacancy numbers. Employers continue to compete for workers in care, engineering, logistics, professional services and construction, driving upward pressure on pay levels.

Taken together, the evidence suggests that Suffolk's labour market remains characterised by persistent demand for workers, continued recruitment challenges in key sectors, and increasing competition for skills. While overall vacancy levels have stabilised, employers continue to face pressures in securing the workforce required to support economic growth, infrastructure delivery and public services across the county and wider region.

6.6 Infrastructure and workforce demand

A defining feature of the Suffolk and East of England labour market is the concentration of major infrastructure and growth projects taking place simultaneously across the region.

Sizewell C forms part of a wider pipeline of nationally significant developments, including offshore wind projects, National Grid transmission upgrades, water infrastructure programmes, Freeport East, housing growth and major transport schemes. Many of these projects require similar occupational groups, particularly construction trades, civil engineering occupations, logistics personnel, project managers, electrical operatives and technicians.

The East of England Regional Skills Partnership (co-led by Skills England and East of England Construction Technical Excellence College (CTEC)) has been established in response to these growing workforce challenges. The Partnership seeks to create a shared understanding of workforce demand across a group of anchor infrastructure projects, identify priority skills shortages, improve coordination across providers and employers, and support collaborative responses to meet the infrastructure projects workforce needs. Early priorities include developing a regional workforce forecast, identifying critical skills pressures and mapping current training provision across the region; as well as identifying opportunities with regional partners to develop a coordinated, regional response to increasing capability and provision.

This increasingly regional approach to workforce planning will be important in ensuring that skills investment is targeted effectively, that workforce shortages are identified early and that Suffolk residents are able to benefit from the employment opportunities created through the region's infrastructure pipeline.

6.7 Implications for the ASIP

The labour market evidence, regional context and infrastructure pipeline reinforce the importance of maintaining an evidence-led approach to skills investment.

The analysis does not in itself determine investment priorities. Instead, it identifies areas where further assessment may be required through the Regional Skills Need Assessment Framework.

The evidence suggests that future Skills Need Assessments should continue to consider:

1. The cumulative workforce impact of major regional projects and developments.
2. Occupations and skillsets experiencing persistent recruitment difficulties.
3. Areas where workforce demand is forecast to increase significantly.

4. Training provision, capacity and progression pathways across the skills system.
5. Opportunities to improve workforce resilience and long-term economic outcomes.
6. The potential for interventions to deliver benefits beyond a single employer or project.

Investment decisions should continue to be informed by detailed Skills Need Assessments, taking account of workforce demand, training supply, deliverability, value for money and wider regional benefit.