Arcavia Consulting

ARCAVIA MONTHLY · CONSTRUCTION AND INFRASTRUCTURE

September: Construction in the press

Five trade titles read as one: the trends, our clients' month and the articles worth opening.

798
ARTICLES INDEXED,
1 TO 30 SEPTEMBER

6
TRENDS THAT RAN
ACROSS THE TITLES

10
ARTICLES NAMING DRAGADOS,
GENSLER OR GEOBEAR

OCTOBER 2026

CONSTRUCTION NEWS · NCE · THE CONSTRUCTION INDEX · CONSTRUCTION ENQUIRER · GROUND ENGINEERING

Our clients in the month's coverage

Three Gensler masterplans, four Geobear pieces and a Dragados framework now letting work.

Gensler

THREE SCHEMES, £7.85BN BETWEEN THEM

Gensler Europe is on the first list of 23 firms Universal named for its £5bn Bedford resort, with enabling works under way and 20,000 construction jobs expected (Construction Enquirer, 15 September).

In Birmingham, Gensler drew up the masterplan for Sphere Group and Legal & General's £350m Rackhams scheme: more than 500 homes and 225,000 sq ft of offices. In east London it is advising Arada on Thameside West, a £2.5bn, 5,000-home district whose first 1,500 homes went in for planning in late September.

- **Universal names first contractors for £5bn Bedford theme park** Construction Enquirer, 15 Sep
- **£350m flats plan for Birmingham shopping landmark** Construction Enquirer, 22 Sep
- **First plans go in for vast Royal Docks scheme** Construction Enquirer, 28 Sep

Geobear

FOUR ARTICLES ACROSS NCE AND GE

Jon Chevin, Geobear's commercial and infrastructure director, made the case in NCE and GE for forecasting ground risk alongside the weather. Soil moisture deficit across the South East and London passed the 320mm surge threshold in July, and Geobear's Subsidence Surge Forecast Dashboard showed conditions around or above the 2018 and 2022 subsidence years by 1 September.

GE also featured Geobear's rapid ground improvement at Bridport Harbour, buying Dorset Council time to save its Grade II-listed 1820s wall, and a remediation for Argyll and Bute Council: 250 injection points over 15 days with the building kept in use.

- **Is it time to put ground conditions on the weather forecast?** NCE, 21 Sep
- **Rescuing a 200-year-old coastal defence** Ground Engineering, 25 Sep
- **Keeping commercial assets open during ground remediation** Ground Engineering, 11 Sep

Dragados

TFL FRAMEWORK LETTING WORK

TfL is letting its South Kensington step-free upgrade, valued at £120m by Glenigan, through the £700m Infrastructure Improvement Framework. Dragados won one of its places in May, alongside Costain and Amey.

The framework runs from June 2026 to May 2028 with a two-year extension option, and is built on early contractor involvement and multi-stage contracting. TfL plans enabling works before the end of 2026 and completion by 2031 (Construction News, 22 September).

- **Costain lined up for £120m South Kensington Tube upgrade** Construction News, 22 Sep
- **Costain set to deliver South Kensington Tube station transformation** NCE, 22 Sep

What ran across all five titles

The same stories, told from the contractor, engineer and specialist side.

TREND 1

The top end is stronger

The CN100 and TCI Top 100 both put average margin above 3%, with CN100 cash up two-thirds since 2021.

CN · TCI · GE · CE

TREND 2

Awards are running ahead of starts

Contract awards up 120% on a year earlier while starts wait. Housing is the drag, and policy is moving to help it.

CN · TCI · CE

TREND 3

Energy, water and transport carry the pipeline

GB Grid, Wylfa, Sizewell C, NI Water, A9 and HS2's next phase set the biggest procurements.

NCE · CN · CE · TCI

TREND 4

Hiring at both ends

Balfour Beatty, Costain and @one expanded intake, and Heathrow pledged 5,000 places. Trade rates hit a record.

CN · NCE · GE · CE

TREND 5

Costs are back on the agenda

Diesel passed its 2022 record and tender prices rose 3.2% a year. Contractors are still eager to bid.

CN · CE

TREND 6

Consultancies are building scale

WSP, RSK, Cardo, Vinci and Accenture all bought or built capacity in the month.

TCI · CE · NCE · GE

KEY TAKE AWAYS

- Every trend points the same way for hiring: **the work is won, and delivery leadership** is what clients and contractors will compete for next.
- Programme, commercial and client-side roles come up in almost every trend. They are the **hires to plan for in Q4**.

The top end is stronger

Two league tables, one finding: bigger contractors with better margins and more cash.

The CN100's 100 largest contractors turned over £84.88bn, up almost 8%, with pre-tax profit rising from £1.93bn to £2.46bn (Construction News, 21 September).

The Construction Index's own Top 100 reached the same place by a different panel: £81bn of revenue, up 9.1%, an average margin of just over 3% against 2.4% a year earlier, and 87 firms in profit against 83 (The Construction Index, 3 September). CN put combined cash at £14.43bn, two-thirds up on 2021.

The results season filled in the detail. Kier reported a record £11.9bn order book and its first average month-end net cash position in a decade, across more than 120 frameworks (The Construction Index, 15 September). Galliford Try grew pre-tax profit 24.7% to £55m, Balfour Beatty rejoined the FTSE 100 on 1 October, and NG Bailey led a top four of M&E contractors each turning over £590m or more (Construction Enquirer, 16 September).

Specialists are confident too. In the GE100 survey, 59% of respondents expect workload to rise over the next year and 4% expect a fall (Ground Engineering, 11 September).

3.4%

CN100 AVERAGE MARGIN

87

TCI TOP 100 FIRMS IN PROFIT

IN THEIR WORDS

"The big utilities, the housing associations, government departments and big private sector clients... are moving more towards working with frameworks." Alastair Stewart, Progressive Equities Research, in TCI.

The CMA reached the other side of the same point: prequalification on past delivery can make it harder for growing firms to win public work (Construction News, 9 Sep).

KEY TAKE AWAYS

- Frameworks reward balance sheets. **Finance and commercial directors** now sit in the bid, not behind it.
- Firms stepping up a tier, such as Clegg towards £100m, need **framework-ready bid and delivery leads.**

Awards are running ahead of starts

The pipeline filled through the summer, and housing has new policy behind it.

Main contract awards rose 120% on a year earlier in Glenigan's September review, led by major projects and infrastructure, while starts fell 49% over the quarter (Construction News, 17 September).

Contractors are hungry for the work. BCIS found 77% of its panel reporting contractors eager to tender, up from 67% in the second quarter, and more than half expecting their tender pipeline to grow (Construction News, 22 September). Kier topped both CN's and Construction Enquirer's August contract league tables, the latter with nearly £530m across ten projects.

Housing is where the totals are held back. Housing work accounted for about 85% of the annual fall in July output, and HBF counted 45,315 planning permissions in the second quarter, the lowest quarterly figure since 2012 (Construction Enquirer, 30 September). Starts tell a better story: 35,910 in England in the second quarter, up 20% on a year earlier, as higher-rise schemes cleared the Building Safety Regulator (Construction Enquirer, 25 September).

Policy and capital are moving behind housebuilding. The government's Your First Home scheme will back first-time buyers of new-build homes with a 2.5% deposit and an equity loan of up to 20%, and Daiwa House took a 30% stake in Miller Homes as it targets 7,000 homes a year, up from 5,000 (The Construction Index, 17 September). The Building Safety Levy applies to schemes entering building control from 1 October.

+20%

ENGLAND HOUSING STARTS, Q2 2026 ON Q2 2025

KEY TAKE AWAYS

- Work won this summer moves to site over the next two to three quarters. **Project and construction managers** are the first pinch point.
- Gateway 2 is now a delivery skill. **Building safety and design managers** who have taken schemes through the BSR are in short supply.
- Your First Home and new capital point to a **housebuilding recovery in 2027**. Land and technical teams get hired first.

Energy, water and transport carry the pipeline

The month's largest procurements came from grid, nuclear, water, roads and aviation.

PROGRAMME	SCALE	WHAT HAPPENED
Great British Grid	up to £4bn	Publicly owned network investor confirmed; developers get wider rights to build their own connections (CE)
Transmission upgrades	£70bn	NAO reviewed the timetable for the grid schemes behind Clean Power 2030
NI Water IF109 framework	£10.5bn	Procurement launched; up to 12 years from October 2027
Luton Airport expansion	£2.5bn+	Mace Consult and Arcadis lead programme management into delivery
A9 dualling, remaining sections	£1.94bn	Shortlist named and tenders invited; framework due by year end
Wylfa SMR early works	up to £1.1bn	Single combined package, June 2028 to 2034
A46 Newark Bypass	£700m	Back to market for a new design and build route
Graham: Oxford flood alleviation	£220m	5km scheme; more than £1.8bn of flood damage avoided over its life
Sizewell C tunnel segment factory	38,500 segments	Avonmouth approved; up to 400 jobs, production from 2028
HS2 professional services partnering	10 years	From October 2027 as HS2 moves into systems and commissioning
Heathrow third runway	£49bn	Now targeting 2039; £21bn for the runway and airfield

Government moved on consents and delivery in the same month. The chancellor extended judicial review reforms from energy to all major infrastructure (NCE, 8 September), and MPs opened two inquiries into procurement and civil-service capability.

KEY TAKE AWAYS

- HS2, Luton and Heathrow are all moving into **programme and systems** phases. Client-side PMs and commercial leads are the scarce roles.
- Nuclear and grid will compete with each other for **project controls and planners** from 2027.
- The A9 and NI Water put **Scotland and Northern Ireland** among the busiest civils markets for the next decade.

Hiring at both ends

Early-careers intakes grew sharply, and experienced trades command record rates.

Balfour Beatty plans to take its UK workforce from about 14,000 to 16,000 by December 2027, with around 1,000 of the roles in apprenticeships, graduate schemes and trainee posts (Construction News, 23 September).

Costain took on 50 apprentices this year, double last year's intake, across road, rail, energy, water, and defence and nuclear (Ground Engineering, 8 September). Anglian Water's @one Alliance hired 269 engineers and more than 500 people in the first year of AMP8 (NCE, 8 September), and Thames Water had 9,908 applications for 145 apprenticeships. Heathrow pledged 5,000 apprenticeships and training places tied to the third runway (Construction Enquirer, 15 September).

The education pipeline is widening. Degree-level construction and architecture apprenticeships are up 95% since 2024 and offered at 35 of the top 100 universities, a construction vocational GCSE has been proposed, and the government will publish a construction jobs plan this year.

At the experienced end, self-employed trades averaged a record £1,110 a week in August, up 4.5% on a year earlier, with plumbing at £1,348 (Construction Enquirer, 25 September). NCE put the engineering requirement at about 124,000 new engineers and technicians a year.

50

COSTAIN APPRENTICES, DOUBLE LAST YEAR

269

@ONE ALLIANCE ENGINEERS HIRED

KEY TAKE AWAYS

- Entry-level intake is growing fast. The gap is **five to fifteen years in**: project managers, planners and commercial leads who can run the work.
- Record trade rates feed straight into **package pricing**. Estimators who know current labour costs are worth more this year.
- Right-to-work fines of up to £60,000 per worker applied from 1 October. **Supply-chain compliance** is now a hiring criterion.

Costs, capital and consolidation

Fuel and labour pushed costs up while consultancies bought and built capacity.

Costs are back on the agenda

Diesel reached a record 199.18p a litre on 28 September, past the June 2022 high (Construction News, 29 September). Construction Enquirer put the rise since January at about £590m a year across infrastructure, where plant-heavy civils firms feel it most.

BCIS has tender prices up 3.2% on a year earlier, and Arcadis expects private-sector bid prices to rise 1% to 4% this year against CPI at 3.1%. Contractors are pricing keenly to win the awards now coming through.

Consultancies are building scale

WSP stepped back from its £3.8bn approach for Arcadis on 23 September (Construction Enquirer, 23 September) and a week later bought Hulley & Kirkwood, a 122-person building services consultancy with seven UK offices (The Construction Index, 30 September).

Accenture launched Accenture Construct for owner-side capital projects, after growing that business fourfold in three years (The Construction Index, 24 September). RSK bought £61m-turnover highways contractor MSF, Cardo built a £314m business through a run of acquisitions, and Vinci companies added CDD Automation in the UK and Bradshaw Construction in the US.

199.18p

DIESEL PER LITRE, 28 SEPTEMBER, A RECORD

KEY TAKE AWAYS

- Plant-heavy civils firms need **commercial managers** who can recover fuel costs through the contract.
- Every acquisition comes with an **integration plan**, and owner-side consultancy is now competing for the same programme people.

The articles worth opening

Thirty-three links by title. Client articles are on page two.

CONSTRUCTION NEWS

- CN100 2026: top contractors grow revenue to £84.9bn 21 Sep
- Construction starts plunge 49% but contract awards soar 17 Sep
- Balfour Beatty to add 2,000 UK staff by 2027 23 Sep
- Government to publish construction jobs plan this year 2 Sep
- Burnham confirms plans for Great British Grid 30 Sep
- HS2 hopes to seal SCS and BBV contract resets by Christmas 15 Sep
- Early involvement 'as a norm' spurs Galliford Try profit 17 Sep
- Building-sector degree apprenticeships surge at universities 22 Sep

NCE

- Heathrow Airport's third runway delayed until 2039 29 Sep
- £70bn grid upgrade timetable 'very challenging', says NAO 11 Sep
- HS2 seeks 10-year professional services deal 23 Sep
- £1.94bn framework shortlist for remaining sections of A9 dualling 16 Sep
- Why the shortage of engineering talent is reshaping recruitment 23 Sep
- DfT sets out framework for Great British Railway's 30-year rail plan 22 Sep
- Lower Thames Crossing: challenges and opportunities 17 Sep

THE CONSTRUCTION INDEX

- Top 100 Construction Companies 2026 3 Sep
- Kier aims higher 15 Sep
- Accenture launches global construction business 24 Sep
- WSP acquires building services consultancy 30 Sep
- Daiwa House buys stake in Miller Homes 17 Sep
- First New Hospital Programme hospital tops out 7 Sep

CONSTRUCTION ENQUIRER

- Construction labour rates hit record high 25 Sep
- Gateway 2 push fuels 20% jump in housing starts 25 Sep
- Midlands £3bn framework winners named 17 Sep
- M&E super league emerges as NG Bailey takes top spot 16 Sep
- House builders hail return of Help to Buy-style loans 28 Sep
- Developers to get power to build own grid connections 29 Sep
- Kier storms August contracts league with £530m haul 7 Sep

GROUND ENGINEERING

- GE100 2026: geotechnical sector holds firm 11 Sep
- GE100 2026: the UK's top 100 ground engineering firms 11 Sep
- Is it time to put ground conditions on the weather forecast? 30 Sep
- Rescuing a 200-year-old coastal defence 25 Sep
- Vinci subsidiary acquires US-based Bradshaw Construction 22 Sep

METHOD

Every article published between 1 and 30 September 2026 was indexed with its date: Construction News 247, NCE 172, Construction Enquirer 142 and Ground Engineering 79 from their sites, and The Construction Index 158 from its news listing. Stories quoted were read for their figures, and values are as each title reported them. Building is not included this month. Administrations, prosecutions and individual company losses are not carried. Some articles sit behind subscriptions.