

Power play

Rays of sunshine are finally visible following a year of uncertainty, with the ground engineering sector betting big on the power sector.

GE's 2024 GE100 industry survey was filled out by 125 UK geotechnical contractors, consultants, suppliers and manufacturers.

Office for National Statistics figures showed the UK entered a "technical" recession in the last half of 2023.

This was followed by slow growth at the beginning of 2024 and following the announcement of the snap general election. However, the economic outlook for the UK has since brightened. According to a recent Deloitte briefing, "growth has come back more quickly than expected, inflation is running at a third the levels of a year ago and [in July] the Bank of England cut interest rates for the first time in more than four years".

The S&P Global UK Construction Purchasing Managers' Index from August showed that the construction sector's growth also picked up at the start of the third quarter. Increased activity and new orders were witnessed across the commercial property, housing and infrastructure sectors.

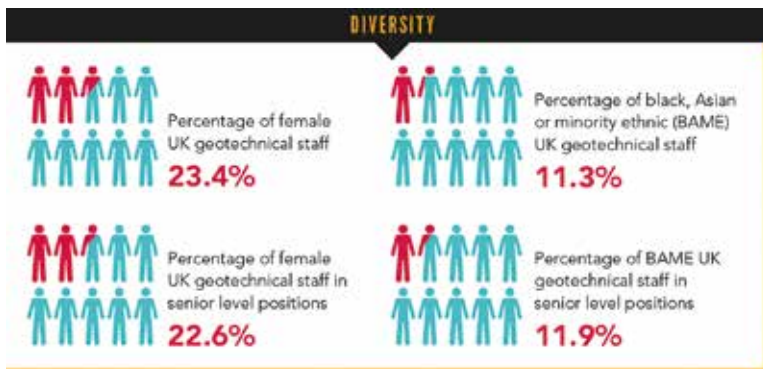
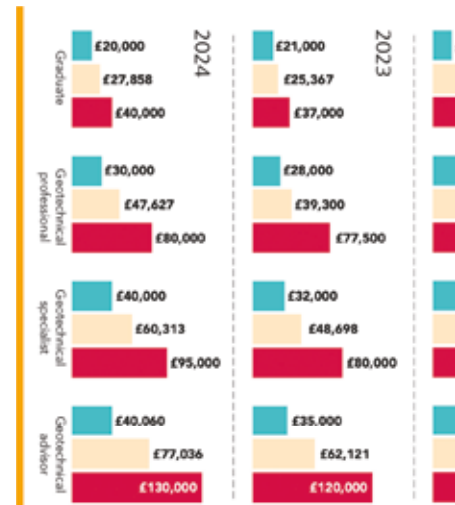
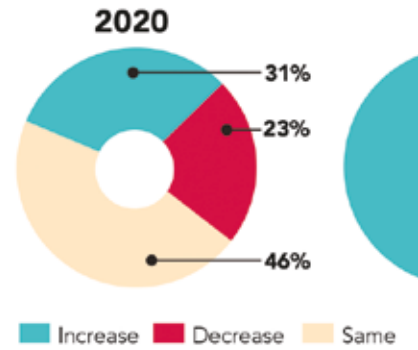
Based on the GE100 results, 59% of respondents expect their workload to increase over the next 12 months, which is up from last year's 53%. Although the number of those expecting a decrease has also risen from 8% to 12%. In addition, 23% of respondents are worried that there is too little work to go around, up from last year's 16%.

The aftereffects of the axing of High Speed 2's northern leg in October 2023 are nonetheless still being felt, and the new Labour government has cancelled the A303 Stonehenge tunnel scheme. Nonetheless, based on our survey, the industry's expectations for growth in the rail sector have only slightly decreased compared to last year (going from 34.4% to 33.3%), while more companies are certain about road work (going from 25.9% to 30.2%).

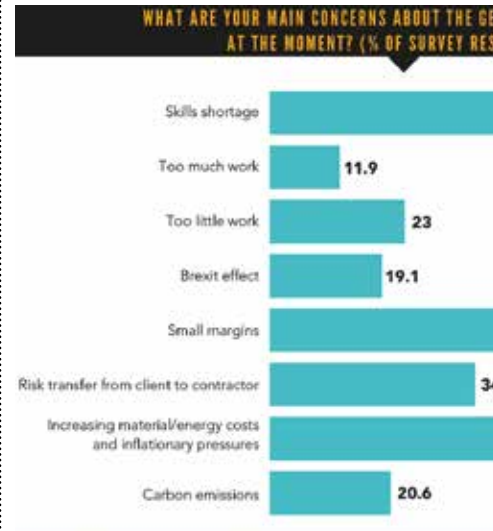
The ground engineering industry expects to see most of its work coming from the power sector, with a staggering 74.6% of respondents saying the sector will grow over the next year. This is up from last year's 68.2%.

Salary survey: The GE100's salary survey shows that average pay for early career engineers has stayed consistent over the last five years; however, salaries seem to be getting bigger for those in more senior positions.

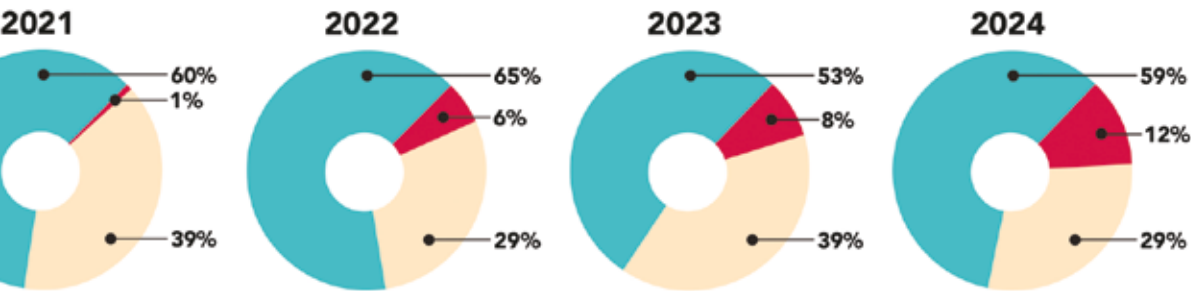
Primary concerns: The ground engineering sector's skills shortage tops the list of industry concerns, with the figure rising from 73.3% in 2023 to 74.6% in 2024. In addition, 86.5% of respondents said they struggled with recruitment of appropriately skilled staff in the last 12 months – this is the third year in a row that this figure has been above 80%.



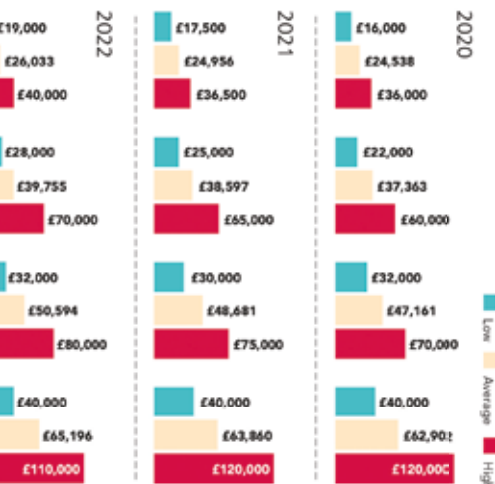
Diversity: With continued skills shortages, the ground engineering sector needs to focus on attracting talent from more diverse backgrounds. While the percentage of women working at the UK geotechnical firms that responded to the survey is similar to last year's figure (23.5%), the number of women in senior level positions has gone up from 20% to 22.6%. There are also slightly more Bame individuals working across the industry, with the percentage rising from 9.9% to 11.3% year on year, although only a small number are reaching leadership level positions.



WORKLOAD PREDICTIONS: 2020-2024



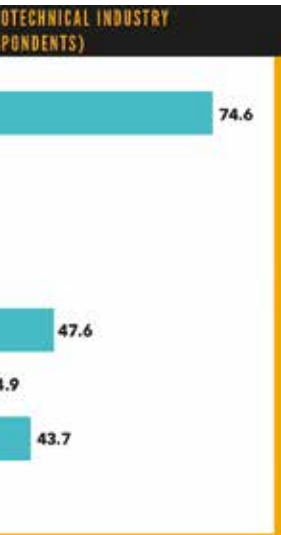
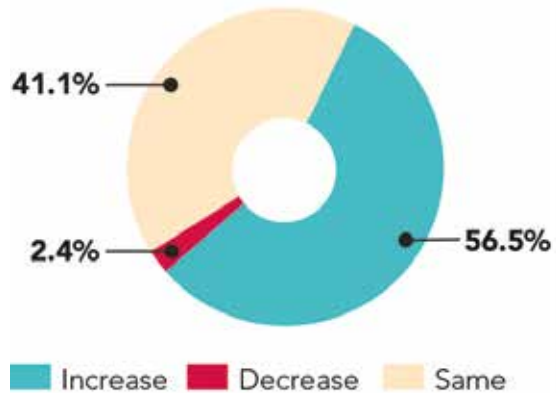
Workload predictions: The ground engineering sector remains optimistic, with 88% of respondents expecting to see an increase or the same amount of work continuing over the next 12 months.



SALARY SURVEY: 2020-2024

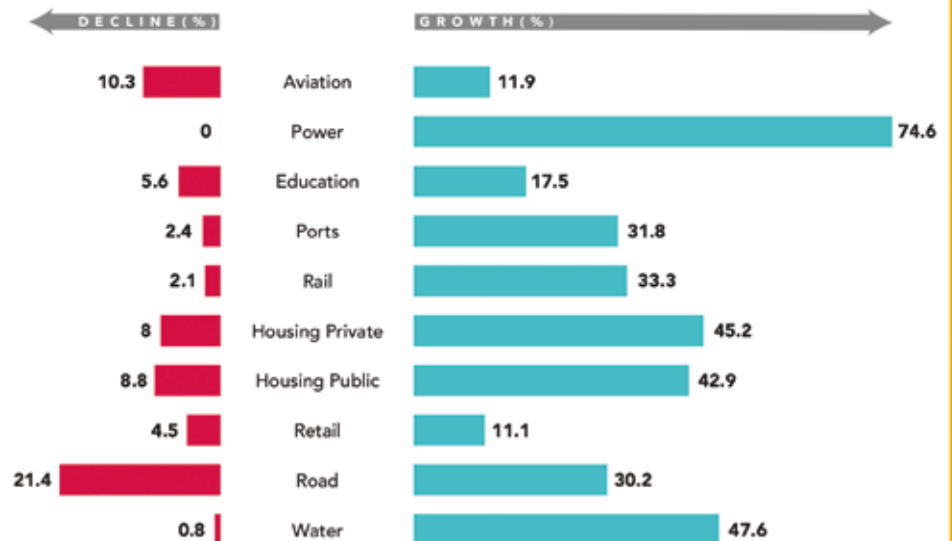
Staff predictions: As in 2023, more than half of respondents expect their geotechnical staff numbers to increase in the next 12 months. However, companies might encounter issues with filling the roles, as highlighted by the skills shortage concerns.

STAFF PREDICTIONS: 2024



Sectors seeing growth and decline: Will the power sector lead the way over the next 12 months? With new onshore wind back on the table – after the government lifted a de facto ban set in 2015 – grid upgrades needed to support the energy transition, new renewable energy projects, and the creation of Great British Energy, it is looking promising.

SECTORS SEEING GROWTH AND DECLINE (% OF SURVEY RESPONDENTS): NEXT 12 MONTHS



TOP 100 UK GEOTECHNICAL COMPANIES

Rank	Company	UK geotechnical turnover	Rank	Company	UK geotechnical turnover
1	Bachy Soletanche	£218M	51	Tony Gee and Partners	£9.4M
2	RSK Group	£182M	52	Richter	£8.91M
3	Balfour Beatty Ground Engineering	£170M	53	Central Alliance Preconstruction Services	£8.7M
4	Van Elle	£139.5M	54	PJ Edwards & Co	£8.5M
5	Keller	£124.62M	55	Coffey Geotechnics	£8M
6	Fugro	£120M	56	Lankelma	£7.9M
7	Cementation Skanska	£88.24M	57	Wardell Armstrong	£7.8M
8	Bam Ritchies	£82M	58	Cohesion Piling Company	£7.46M
9	Roger Bullivant	£80M	59	GWP Consultants	£6.7M
10	Aarsleff Ground Engineering	£78.6M	60	Ramboll	£6.5M
11	Socotec UK	£66M	61=	Altrad RMD Kwikform	£6.2M
12	Aecom	£55M	61=	Quantum Geotechnic	£6.2M
13	Bauer Technologies	£52.3M	63	CC Ground Investigations	£6M
14	Arcadis	£50.5M	64	Stuart Wells	£5.95M
15=	Mott MacDonald	£50M	65=	Gavin and Doherty Geosolutions (UK)	£5.5M
15=	Jacobs	£50M	65=	Fairhurst Group	£5.5M
17	Keltbray Built Environment	£45M	65=	Geo Site Surveys	£5.5M
18	Arup	£42.96M	68	Fussey Piling	£5.4M
19	Atkins Réalis	£42M	69	Solmek	£5.2M
20	WSP	£40M	70	Amey Consulting	£5M
21	Cognition Land and Water	£38M	71	Southern Testing Laboratories	£4.9M
22	Menard	£32M	72	In Situ Site Investigation	£4.7M
23	Ed Züblin UK Branch	£30.1M	73	DNV	£4.56M
24	Tensar International	£27.97M	74	Geobruigg	£4.4M
25	Tetra Tech UK	£27.2M	75	GRM Development Solutions	£4.2M
26	Soil Engineering Geoservices	£27.1M	76	Geotechnical and Environmental Associates	£4.1M
27	Expanded Geotechnical	£25.3M	77	Marshall Drilling	£4.02M
28	Causeway Geotech	£22.8M	78	BWB Consulting	£3.85M
29	Systra	£22.4M	79	A F Howland Associates	£3.73M
30	Structural Soils	£22M	80	Geosense	£3.6M
31	Speedeck Foundations	£21.9M	81=	TRC Companies	£3.5M
32	Foundation Piling	£21.5M	81=	Akela Ground Engineering	£3.5M
33	Central Piling	£20M	83=	Buro Happold	£3.4M
34	Maccaferri	£18.2M	83=	Wentworth House Partnership	£3.4M
35	Igne Group	£17.7M	85	Earth Environmental & Geotechnical	£3M
36	Geotechnical Engineering	£16M	86	Applied Geology	£2.96M
37=	Franki Foundations UK	£15M	87	ADP Group	£2.8M
37=	Newton Ground Engineering	£15M	88	Rendel	£2.52M
39	Ayesa	£14.4M	89=	Norfolk Partnership Laboratory	£2.5M
40=	CGL	£12.55M	89=	Jomas Associates (Engineering & Environmental)	£2.5M
40=	FK Lowry	£12.55M	91	Brownfield Solutions	£2.42M
42	SLR Consulting	£12.41M	92	Pell Frischmann Consultants	£2.4M
43	VSL Systems (UK)	£12.07M	93=	Sub Surface	£2.2M
44	Sheppard Piling	£12M	93=	Earth Science Partnership	£2.2M
45	WJ Groundwater	£11.66M	95=	Campbell Reith	£2.1M
46	A-Squared Studio / A2-S1 / A2AM / A2M	£11M	95=	Eastwood Consulting Engineers	£2.1M
47	Geotechnics	£10.5M	95=	Bluefield Geoservices	£2.1M
48	Concept Engineering Consultants	£10.1M	95=	Geotron UK	£2.1M
49	Dunelm Geotechnical and Environmental	£10M	99	Land Science	£1.82M
50	Cowi	£9.45M	100	Haskoning DHV UK	£1.8M

TOP 50 UK CONTRACTORS

Rank	Company	UK geotechnical turnover	Rank	Company	UK geotechnical turnover
1	Bachy Soletanche	£218M	25=	Newton Ground Engineering	£15M
2	Balfour Beatty Ground Engineering	£170M	27	FK Lowry	£12.55M
3	Van Elle	£139.5M	28	VSL Systems (UK)	£12.07M
4	Keller	£124.62M	29	Sheppard Piling	£12M
5	Fugro	£120M	30	WJ Groundwater	£11.66M
6	Cementation Skanska	£88.24M	31	Geotechnics	£10.5M
7	Bam Ritchies	£82M	32	Concept Engineering Consultants	£10.1M
8	Roger Bullivant	£80M	33	Dunelm Geotechnical and Environmental	£10M
9	Aarsleff Ground Engineering	£78.6M	34	Central Alliance Preconstruction Services	£8.7M
10	Socotec UK	£66M	35	P J Edwards & Co	£8.5M
11	Bauer Technologies	£52.3M	36	Lankelma	£7.9M
12	Keltbray Built Environment	£45M	37	Cohesion Piling Company	£7.46M
13	Cognition Land and Water	£38M	38	Quantum Geotechnic	£6.2M
14	Menard	£32M	39	CC Ground Investigations	£6M
15	Ed Züblin UK Branch	£30.1M	40	Stuart Wells	£5.95M
16	Soil Engineering Geoservices	£27.1M	41	Geo Site Surveys	£5.5M
17	Expanded Geotechnical	£25.3M	42	Fussey Piling	£5.4M
18	Causeway Geotech	£22.8M	43	Solmek	£5.2M
19	Structural Soils	£22M	44	In Situ Site Investigation	£4.7M
20	Speedeck Foundations	£21.9M	45	Marshall Drilling	£4.02M
21	Foundation Piling	£21.5M	46	Akela Ground Engineering	£3.5M
22	Central Piling	£20M	47	ADP Group	£2.8M
23	Igne Group	£17.7M	48=	Bluefield Geoservices	£2.1M
24	Geotechnical Engineering	£16M	48=	Geotron UK	£2.1M
25=	Franki Foundations UK	£15M	50	Risk Management	£0.6M

TOP 50 UK CONSULTANTS

Rank	Company	UK geotechnical turnover	Rank	Company	UK geotechnical turnover
1	RSK Group	£182M	26	DNV	£4.56M
2	Aecom	£55M	27	GRM Development Solutions	£4.2M
3	Arcadis	£50.5M	28	Geotechnical and Environmental Associates	£4.1M
4=	Mott MacDonald	£50M	29	BWB Consulting	£3.85M
4=	Jacobs	£50M	30	AF Howland Associates	£3.73M
6	Arup	£42.96M	31	TRC Companies	£3.5M
7	Atkins Réalis	£42M	32=	Buro Happold	£3.4M
8	WSP	£40M	32=	Wentworth House Partnership	£3.4M
9	Tetra Tech UK	£27.2M	34	Earth Environmental & Geotechnical	£3M
10	Systra	£22.4M	35	Applied Geology	£2.96M
11	Ayesa	£14.4M	36	Rendel	£2.52M
12	CGL	£12.55M	37=	Norfolk Partnership Laboratory	£2.5M
13	SLR Consulting	£12.41M	37=	Jomas Associates (Engineering & Environmental)	£2.5M
14	A-Squared Studio / A2-SI / A2AM / A2M	£11M	39	Brownfield Solutions	£2.42M
15	Cowi	£9.45M	40	Pell Frischmann Consultants	£2.4M
16	Tony Gee and Partners	£9.4M	41=	Sub Surface	£2.2M
17	Richter	£8.91M	41=	Earth Science Partnership	£2.2M
18	Coffey Geotechnics	£8M	43=	Campbell Reith	£2.1M
19	Wardell Armstrong	£7.8M	43=	Eastwood Consulting Engineers	£2.1M
20	GWP Consultants	£6.7M	45	Land Science	£1.82M
21	Ramboll	£6.5M	46	Haskoning DHV UK	£1.8M
22=	Gavin and Doherty Geosolutions (UK)	£5.5M	47	Binnies UK	£1.75M
22=	Fairhurst Group	£5.5M	48	Patrick Parsons	£1.7M
24	Amey Consulting	£5M	49	Baker Hicks	£1.65M
25	Southern Testing Laboratories	£4.9M	50	Geo Dyne	£1.47M

TOP 50 GEOTECHNICAL FIRMS BY UK STAFF NUMBERS

Rank	Company	Staff	Rank	Company	Staff
1	RSK Group	2,500	26	Bauer Technologies	115
2	Van Elle	660	27=	Geotechnics	100
3	Socotec UK	628	27=	Foundation Piling	100
4	Fugro	615	29	Bachy Soletanche	96
5	Aecom	550	30	Ayesa	85
6=	Atkins Réalis	460	31	Franki Foundations UK	81
6=	Jacobs	460	32=	Amey Consulting	75
8	Cowi	440	32=	Menard	75
9	Arcadis	420	32=	Wardell Armstrong	75
10=	Bam Ritchies	400	35	CGL	74
10=	WSP	400	36=	VSL Systems (UK)	70
12	Keller	393	36=	WJ Groundwater	70
13	Balfour Beatty Ground Engineering	330	36=	Tony Gee and Partners	70
14	Arup	311	36=	Ramboll	70
15=	Mott MacDonald	300	36=	A-Squared Studio / A2-SI / A2AM / A2M	70
15=	Cementation Skanska	300	41=	Dunelm Geotechnical and Environmental	66
17	Structural Soils	245	41=	Richter	66
18	Aarsleff Ground Engineering	240	43=	Fairhurst Group	65
19	Tetra Tech UK	198	43=	Southern Testing Laboratories	65
20	Soil Engineering Geoservices	185	43=	CC Ground Investigations	65
21	Igne Group	159	43=	Geosense	65
22	Geotechnical Engineering	150	47	Gavin and Doherty Geosolutions (UK)	59
23=	Causeway Geotech	120	48	Coffey Geotechnics Limited	58
23=	SLR Consulting	120	49	Central Piling	55
25	Central Alliance Preconstruction Services	119	50	Newton Ground Engineering	54