

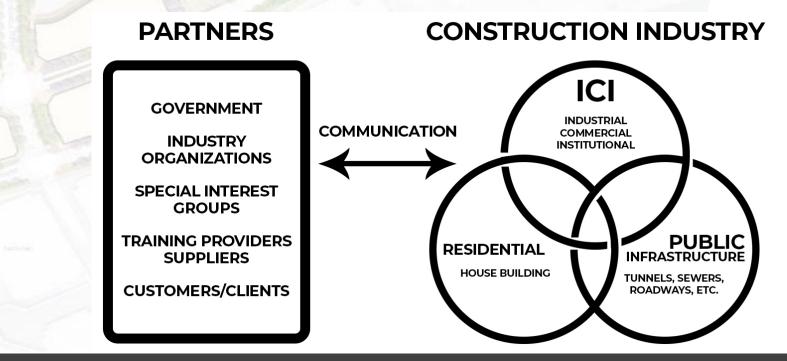
Nova Scotia Construction Sector Council Industrial ~ Commercial ~ Institutional

Labour Market Challenges & Opportunities Atlantic Association of Applied Economics June 27, 2023



Types of Construction

- Residential
 - single family homes and duplexes
- Road-building and Utilities (Engineering)
- Industrial
- Commercial
- Institutional









Nova Scotia Construction Sector Council Industrial ~ Commercial ~ Institutional **State of the Sector**

average age of worker

estimated ICI workforce (NS) 16851 **40 Years** journeypersons: 44 Years (male: 97%, female: 3%) apprentices: 31 Years (male: 94%, female: 6%) 55% would recommend a career in

trades to their children

56.5% of the time, tradespeople worked within their local areas (within 100km)

82% of workers have the equivalent or more than a post-secondary certificate/diploma from a trade school/community college/technical college

ICI CONSTRUCTION



Who is the NSCSC?

Workforce Development:

- Human Resource Planning w/ LMI
- Attraction, Recruitment, Retention
 & Succession
- Capacity Building
- Training / Skills Upgrading

Mission

To change how we see construction in Nova Scotia.





Youth Engagement



TRADES EXHIBITION HALL

First-of-its-kind career awareness facility, built in partnership with unionized contractors, construction trade unions, industry training providers, and the Nova Scotia Government



Youth Engagement



MOBILE CONSTRUCTION EXPERIENCE

One-of-a-kind mobile career awareness facility, built in partnership with unionized contractors, construction trade unions, industry training providers, and the Nova Scotia Government





CONSTRUCTION BUILDING KITS

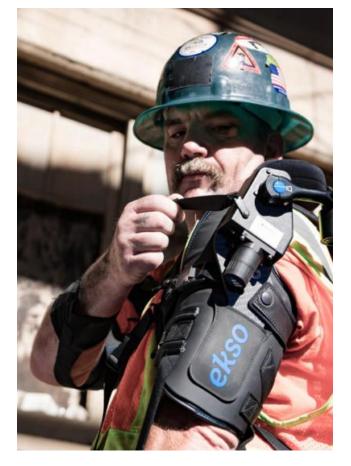


Nova Scotia Construction Sector Council Industrial ~ Commercial ~ Institutional

Technology

















NOVASCOTIA Association of Industry

Nova Scotia Labour Market Assessment 2023 EMPLOYER SURVEY

The Nova Scotia Construction Sector Council (NSCSC), in partnership with (Cape Breton Island Building and Construction Trades Council, Construction Association of Nova Scotia, Mainland Nova Scotia Building and Construction Trades Council, Merit Nova Scotia, Nova Scotia Construction Labour Relations Association, Nova Scotia Department of Labour, Skills and Immigration and Association of Industry Sector Councils), is conducting a Labour Market Assessment of the Industrial-Commercial-Institutional (ICI) Construction Industry across Nova Scotia.

We are inviting ICI Construction industry Employers to take part in a study designed to collect up-to-date information on the state of the sector. The information you provide will help shape industry planning and inform critical decisions for workforce development in Nova Scotia.

You may exit the survey at any given time. Only the responses collected till the time you fill out the survey will be collected. Your answers will be kept strictly confidential. Your personal details will not be linked to your response.

Nova Scotia's Privacy Legislation and any other applicable privacy laws will be followed. Individual responses will be <u>anonymized and compiled</u>. Once all survey responses are assessed, the results will be published in a printed report, and may be made available to the public via the Internet.

The survey should take you approximately **20 minutes** to complete.

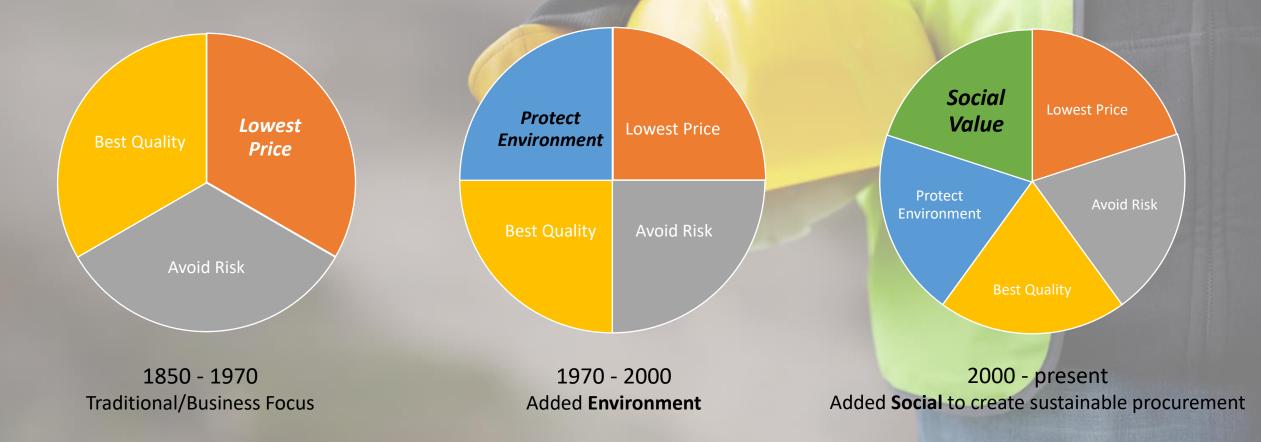


How is Industry Changing?

- Competing, like every other industry, to attract youth, Indigenous and African NS communities, newcomers to Canada, persons with disabilities and women to our sector
- Procurement Public vs. Private & Project Structures
- Industry demand for a "work ready" workforce is increasing
- Increased focus on industry training
- Expectations of mobility are changing
- Performance / Productivity ("performance guarantees")
- Retention is becoming a bigger challenge
- Impact of Technology ("digital disruption")



Procurement Policies and Practices Evolve





"Virtually <u>every</u> government department has something to do with social prosperity."

NS Framework for Social Prosperity

4 common themes:

Workforce Development Apprenticeship Career Opportunities Poverty Reduction Community Economic Benefits Supply Chain Innovation in Technology, Processes or Materials

Social Benefits/Impacts

Community engagement, harmony and diversity Environmental

Design and Build Standards Green Spaces



Nova Scotia Construction Sector Council Industrial ~ Commercial ~ Institutional





NOVA SCOTIA APPRENTICESHI AGENCY Procurement with CBA Integration - Examples of Results

Delivers approximately **1.80** worth of economic benefit for each **1.00** spent.



Cape Breton NS Projects



Construction Sector Council Industrial ~ Commercial ~ Institutional

Updated Demand Scenario - CB

Total FTE's Per Project Year



Construction Sector Council Industrial ~ Commercial ~ Institutional



Mainland NS Projects

Nova Scotia ICI Construction Industry Dashboard: Major Projets Labour Market Impact Model

	2		
	Project Area 🚝 👟 Choose Your Scenario From	Trade	Year 1 Year 2 Year 3 Year 4 Year 5 Year 6 Year 7 Year 8 Max Total
1,783	3 Combined Projects the Drop Down List	Trade Area	FTES FTES FTES FTES FTES FTES FTES Year
	4 Hospital Hospital Cackal Cost \$2,000,000,00	0 1 Mechanical	0 567 567 0 0 0 0 0 567 1,133
1,533 1,514	s Other Projects Other Projects Value \$150,000,00		0 24 24 0 0 0 0 0 24 47
	s Labour Share 40		24 573 597 0 0 0 0 0 597 1,194
			0 28 28 0 0 0 0 0 28 56
	However FTE 200		
1,016	s Accelerated Change Order Pare 0.0		0 0 0 56 0 0 0 0 56 56
	10 Normal Price Escalation 0.0		0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0
			0 56 56 0 0 0 0 56 11
	Duration © Total Hospital PROJECT \$2,000,000		236 236 0 0 0 0 0 0 236 472
	TOTAL OTHER PROJECT CC \$150,000,00		
	5 Years COMEINED COSTS \$2,150,000,00		0 0 236 236 0 0 0 0 236 472
	5 6 Years	12 Finishes, Drywall, Flooring, and Ceiling	0 0 222 222 0 0 0 0 222 444
1	Other subscription of the local sector of the		0 0 56 56 0 0 0 0 56 11
	7 Years	13 Operatives (click bias, classes, particle 14 Elevators and Lifts	0 0 21 21 0 0 0 0 21 42
	10 In each of the three boxes above. Refresh Dashboard	15 Labour	21 21 21 21 0 0 0 0 21 83
		16 Supervisor, management, admin	52 111 156 126 0 0 0 0 156 444
	20	Grand Total	444 1,684 2,051 820 0 0 0 0 5,000
	22 Trade Shares Division - Hospitals	FTEs by Trade Division - Hospitals	Surplus (Shortage) by Trade Occupation - Hospitals
	24		
	25 Mechanical 22.7%	re insulators a 47	FTE-Welders and related machine operators 119
	25 m N Endrol 23.96	m Becrical 1194	FTE - Trades helpers and labourers 428
700	28 9 Brick = 1.1%	No Miss Exception 111	
2000	23 vi Main Examplian 2.2% v Earthwork = 1.1%	a Earthwork 56	FTE-Tilesettes -21
	3D Steel Structural canopy) 2,8%	rs Steel (Structural caropy) = 139	FTE-Steamfitters, pipefitters and sprinkler
	8 Roofing, uspour barriers 🗰 2.2%	🕫 Roofing, vapour barriers 💳 111	FTE - Sheet metal workers -109
\$900 Total Value of Projects by Project \$800	Official and the second s	m Concrete [Ind Rebar and form) 472	
	34. Z Doors, Entrances, Windows, and Envelope	Woods (Milwork) and plastics # 83 Finishes, Drywall, Ficoring, and Ceilings 414	FTE - Roofers and shingles -39
\$\$00 (\$ Millions)	35 Christies, Drywall, Flooring, and Cellings 8.9%	Printing, cryster, records, and comp 444 Specialties Grab bars, tracks, partitions, wal., 111	FTE - Refrigeration and air conditioning mechanics 66
复00	25 g Speciaties (Grab tan, tracks, partition, wal . 💼 2.2%	2 Devators and Lifts = 42	FTE - Plumbers -112
	37 I Elevators and Lifts = 0.8%	있 Labour 🗰 83	FTF - Plasterers drougil installers and finishers
£00	39 Supervisor, management, admin 8.9%	Supervisor, management, admin 444	FTE - Plasterers, drywall installers and finishers, . 5
\$900 Total Value of Projects by Project \$800 (\$ Millions) \$000 \$230 \$230 \$160 \$160 \$170 \$000 \$000 \$000 \$000 \$000 \$230 \$160 \$160 \$170	60 0% 5% 10% 19% 20% 25% 30%	0 200 400 600 800 1,030 1,200 1,400	FTE - Painters and decorators (excluding interior 59
\$400 \$230 ¢100 ¢170	4		FTE - Ironworken and structural metal
\$400 \$00 \$230 \$80 \$160 \$160 \$170	Labour Hours by Trade Division - Hospitals	Labour Cost by Trade Division - Hospital	FTE - Insiglators 60
	41		A service service and the service serv
	45 - Mechanical 2,267	m Mechanical \$181,333	FTE-Heavy equipment operators (excluding
	45 m Insulators # 94	n insulators = \$7,556	FTE-Glatiers -141
	48 9 Brick # 111	P Brick = S8,869	FTE - Gasfitters -23
on ford all otal	43 vn Mass Exception = 222	Nass Excavation 517.778	
ireton Sydney Sydney Spital ocation I Total	50 w Earthwork = 111	us Earthwork S8,889	FTE - Floor covering installers -25
	51 r- Steel (Structural canopy) = 278	🗠 Steel (Structural canopy) 🚃 \$22,222	FTE- Elevator constructors and mechanics 11
Breton al Cance Xpansio Spital h Sydne Spital elocatio elocatio	63 52 so Roofing, vapour tarriers 222	oo Roofing, vagour barriers 👝 \$17,778	FTE - Electricia na, including i adustrial and power 👋
Cape Breton Regional Cancer Bay Expansion North Sydney Hospital North Sydney Hospital North Sydney Hospital	Alfin, lat (e. W. St. Concrete (ind Rebur and form) 944	vi Concrete (ind Rebar and form) \$75,555	
Total states and the method with a method wi	state in an and the state of th	S Woods (Milwork) and plastics \$13,833	F7E - Crane Operators 59
Cap Regio No No No C No C S S S S S S S S S S S S S S S S S S	8080 01 56 C Doom, Entrances, Windows, and Envelope 944	Doors, Entrances, Windows, and Envelope \$75,556	FTE-Construction millerights and industrial 🗾 50
NNN NN	Finishes, Drywall, Flooring, and Ceilings Sociaties (Grab bars, tracks, partitions, wall, wall, wall)	Cf Finishes, Drywall, Fixoring, and Osfings 571,111	FTE - Concrete Finishers [5
0	Section of the s	C Specialties (Grab bars, tracks, partitions, waif. == \$17,778 Bievators and Lifts = \$6,667	
	60 g Labour = 167	A Devetors and Lats	FTE- Cargenters 26
0		And	

Nova Scotia Construction Sector Council Industrial ~ Commercial ~ Institutional

2,567







Projects Competing for Labour

- Oil, gas, nuclear projects in Ontario and Western Canada
 - Seasonal shutdowns and potential expansions

Hydrogen Projects

- EverWind Fuels
- Bear Head Energy
- Novaporte

Irving Shipbuilding project

- Arctic and Offshore Patrol Ships (AOPS) 6th nearing completion
- Moving to Canadian Surface Combatant (CSC) builds (15)
- LNG projects could be revived



Apprenticeship & Retention

Forecast / Monitor Major Projects

> Assess Labour Supply

Industry & Community Engagement

Address Industry Training Needs Identify Recruitment & Training Opportunities

Opportunities

- Equity Deserving Groups: leveraging underrepresented labour potential
- Trade area specific interventions training
- New entrants / completion & retention rates (Apprenticeship requirements)
- Labour mobility labour based in Nova Scotia / Atlantic Canada – labour based in other regions of Canada
- Immigration streams
- Retention of older / near-retirement aged workers (perhaps with adjusted work schedules, technology, etc.)
- Recruiting from other sectors / re-skilling existing workforce
- Information sharing / strategic planning
- Procurement





Nova Scotia Construction Sector Council Industrial ~ Commercial ~ Institutional

10 Ragged Lake Blvd., Unit 1 Halifax, NS B3S 1C2 45 Prince Street Sydney, NS B1P 1C6

www.nscsc.ca



Nova Scotia Construction Sector Council Industrial ~ Commercial ~ Institutional