



NAVIGATING THE SKILLS SHORTAGE

Annual Rail Workforce Survey 2024

An in-depth look at the UK rail workforce.

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Foreword

Peter, Lord Hendy of Richmond Hill CBE
Minister of State for Rail



Welcome to the 2024 NSAR Annual Rail Workforce report. I would like to thank NSAR, and the whole team who led this review. I would also like to thank all the organisations and industry partners who responded to NSAR’s survey and provided their workforce data. Without your support and engagement this report would not be able to provide such detailed analysis and insights.

A skilled and diverse workforce is fundamental to delivering the railway passengers and freight users need. This will become even more significant in helping achieve this government’s ambitions to reform the railway. That is why we have committed, through the creation of Great British Railways (GBR), to develop a workforce strategy for rail.

NSAR plays an important role in highlighting the challenges and issues the industry is facing and advising how these can be addressed. Their experience and knowledge of the UK rail industry and its partnership working between government, industry bodies and business is recognised.

We will look forward to GBR in future, and Shadow-GBR in the interim, working closely with NSAR to ensure we are enabling and building the skilled, diverse workforce that the railway needs.

A handwritten signature in black ink, appearing to read 'Peter Hendy', written in a cursive style.

Peter, Lord Hendy of Richmond Hill CBE
Minister of State for Rail

A word from the NSAR Chair

Dyan Perry OBE



The 2024 Rail Workforce Survey provides a critical snapshot of the UK rail industry's workforce. This annual undertaking, now in its eighth year, remains essential for understanding the evolving skills needs of the sector. The survey data, collected from across the industry, offers valuable insights into demographics, job roles and work locations. It enables the industry, businesses and government to set direction and create informed skills strategies and workforce plans.

This year's survey reveals a complex picture. The industry has seen a slight decrease in overall workforce numbers, which is likely a reflection of uncertainty, an inability to replace experienced staff and competition from other sectors. A growing proportion of younger workers is entering the sector, a positive trend that must be nurtured. However, the impending retirement of a significant portion of experienced workers presents a challenge.

The gender and ethnic diversity of the workforce continue to improve. While these are encouraging signs, there is still much work to be done to create a truly inclusive and representative industry.

To address these challenges, the report outlines a series of recommendations. By implementing these recommendations, the rail industry can mitigate risks, improve productivity and ensure a sustainable future. As always, there is a need for cross-industry strategic workforce planning. I urge you to consider how your organisation can take part in this. Tailored versions of the report are available to NSAR members to aid planning.

On behalf of NSAR, I would like to thank all the organisations that contributed to this survey. Your participation is vital in shaping the future of the UK rail industry.

Dyan Perry OBE
NSAR Chair



1.0 Introduction

The rail industry is a complex sector that plays a critical role in modern transportation systems and infrastructure, responsible for moving goods and people across vast distances safely and efficiently. However, the industry faces a significant challenge in developing and maintaining a skilled workforce that can keep pace with rapid technological changes, net zero requirements, demographic shifts and evolving market demands, often in competition. As the industry continues to expand, it must focus on attracting and retaining skilled workers who can adapt to these changing conditions.

As your rail workforce and skills organisation, it is NSAR's role to analyse the current rail workforce and forecast future skills needs. To better understand the current state of the UK rail workforce, NSAR has been conducting an annual comprehensive survey of industry professionals – collecting data from the majority of rail organisations on demographics, job roles and work locations – since 2016. Each year railway organisations across the industry contribute by submitting their workforce data, which is completely anonymised and GDPR compliant to help us analyse over 220,000 employee records, this year. The survey helps NSAR build the most complete and accurate representation of the UK rail workforce, enabling the industry and government to set direction. This analysis highlights the current profile of the workforce and, where relevant, compares this year's statistics to those gathered in previous years.

2024 has again seen a high level of data provided by employers.. NSAR has collated the information received directly from employers, in addition to data from the Sentinel database and from the Office of Rail and Road, to produce a workforce profile covering 220,501 individuals – providing over 95% coverage across the sector including the supply chain. It is important to note that the workforce information relates to those only employed directly in the rail sector.

In this report, we present the results of our survey and highlight key workforce trends. We believe that it will serve as a useful resource for industry and government workforce planning and strategies for recruiting, retaining and developing the next generation of rail professionals.

2.0 Executive summary

Rail remains behind other sectors in its quest for improved productivity. In order to rectify this, from a workforce and skills perspective, we need to investigate supply and demand for skills, education and training – and why we are not attracting or retaining people to work in rail.

The following conclusions can be drawn from the 2024 Rail Workforce Survey data:

- The workforce in rail has decreased over the last year by 9.4% to 220,500, predominantly in the supply chain, leaving fewer workers available to deliver the industry's investment plans.
- We have a workforce that is slightly younger this year than last (the average age of the workforce has decreased from 45 years old in 2023 to 44.1 years old currently).
- The proportion of those workers aged 25 and under has increased from 4.7% in 2023 to 6.3% in 2024. This represents an increase of 20.2% year on year, which is clearly positive but still falls short of the number of workers expected to retire in the next five years.
- The proportion of those workers aged between 31 and 49 has decreased from 50% in 2023 to 43.8% in 2024. In terms of volume of employees, this represents a decrease of 20.6% year on year. Many of those will have gone to other sectors, or left the industry prematurely.
- We have a third of our workforce aged 50 years old or over, which remains a major concern, particularly if the sector or employers do not have effective knowledge transfer capabilities.
- We are facing a critical loss of experience and knowledge in the next seven years (the number of people leaving through retirement and other forms of attrition could be up to 90,000 workers by 2030).
- We remain a male-dominated industry (gender diversity has increased to 17.4% in 2024, up from 16% in 2023).
- The proportion of workers in UK rail who are from an Ethnic Minority Group (EMG) has risen from 12.3% to 14.4%, representing an increase of 17.2% year on year. The UK national average for EMG proportion in the working population is 19.3% according to the ONS.

This combination of high levels of workers over 50, high predicted levels of people leaving the industry and low numbers of new, younger entrants highlights an issue with the attractiveness of the industry and indicates the likelihood of significant skills shortages in the coming years.

There are clear and key areas where consistent workforce deficits exist, which include Signalling & Telecoms, Systems Engineering and Electrification & Plant, where the gaps typically range between 2,000 and 3,000 people per annum. These deficits are creating wage premiums for skills – for Electrification 12% and for Signalling 10%, as advised in last year's report.

Wage inflation continues to drive costs up, projects are being delayed or cancelled and training is being deferred or cancelled due to a shortage of trainers. The cost to these projects of not having the right skills in place could be an additional 7.25% per annum, costs that are not budgeted for currently. Our analysis has included the predicted costs for HS2 systems which will happen over the next five to ten years and create additional pressures on an already in-demand workforce.

40% of all active trainers will reach retirement age by 2030, compounding the issue. Vacancies are proving harder to fill and stronger market competition for talent means that the rail industry is facing declining productivity levels due to a lack of suitably skilled people in the right place.

The challenges facing rail are not unique. The implications of a labour shortage, increasing technological advancements, pressures on public funding, pressure to deliver sustainability and net zero requirements and a low industry perception amongst school and college leavers are all felt by other sectors too. We must look to the efforts of other sectors when making plans to build our workforce, to gather ideas and learn from their lessons. The construction sector contracts let by HS2 have been beneficial in creating additional jobs within the sector. Over the lifecycle of the project at least 2,000 apprenticeships will be created across HS2 and its supply chain, covering a wide range of disciplines and specialisms. By adopting a similar approach across the rest of the sector, an increased number of jobs and apprenticeships can be created.

The benefits of addressing skills shortages in rail are immense. There is the opportunity to generate additional economic value of £310 million for the UK economy between now and 2029 and, using the assumption that 20% of roles are filled by economically inactive people, the rail sector could produce an additional £110 million in social value by 2029.

2.1 Key statistics

- We have seen a 9.4% drop in the total number of workers in UK rail since 2023 – decreases in corporate services and in the supply chain for capital projects are the main contributors to this reduction in overall numbers.
- The proportion of women in the sector has increased from 16.3% in 2023 to 17.4% in 2024. This represents an increase of 6.8% year on year. However, in numerical terms, the number of women in the sector has fallen by 1,303 from 39,672 in 2023 to 38,369 in 2024 – a 3.3% fall. This is in comparison to an equivalent fall of 10.6% for male workers between 2023 and 2024.
- The proportion of workers in UK rail who are from an Ethnic Minority Group (EMG) has risen from 12.3% to 14.4%, representing an increase of 17.2% year on year. The UK national average for EMG proportion in the working population is 19.3% according to the ONS. In numerical terms, the number of EMG workers in the sector has increased by 1,857 from 29,926 in 2023 to 31,783 in 2024 – a 6.2% increase. This increase is in contrast to the number of white workers, where there has been an equivalent fall of 11.6% between 2023 and 2024.
- The average age of a UK rail worker has decreased from 45 in 2023 to 44.1 in 2024.
- The proportion of those workers aged 25 and under has increased from 4.7% in 2023 to 6.3% in 2024. This represents an increase from 11,559 in 2023 to 13,892 in 2024, or 20.2% year on year.

- The proportion of those workers aged 30 and under has increased from 13.5% in 2023 to 15.5% in 2024. This represents an increase from 32,811 in 2023 to 34,244 in 2024, or 4.4% year on year.
- The proportion of those workers aged between 31 and 49 has decreased from 50% in 2023 to 43.8% in 2024. This represents an decrease from 121,769 in 2023 to 96,646 in 2024, or 20.6% year on year.
- The proportion of those workers aged 50 and over has increased from 31.7% in 2023 to 34.3% in 2024. This represents a decrease from 77,720 in 2023 to 75,720 in 2024, or 2% year on year.
- Looking at work types, Capital Projects has seen a reduction of 23,000 workers since 2023, taking its proportion of the overall workforce down from 42.3% in 2023 to 36.1% in 2024. The Maintenance workforce has decreased from 28,963 to 25,000 in 2024, and the Operations workforce has also decreased from 87,133 to 82,791 in 2024.
- Over half the roles in UK rail in 2024 are at Skill Level 3, the equivalent of an A-Level requirement. We are continuing to see a trend of fewer Level 2 roles (GCSE requirement) and more Level 3 roles.
- Look at UK regions, London remains the region with the highest proportion of workers, over 70,000, representing 32% of the sector. This is followed by the South East, North West, Yorkshire & The Humber and the West Midlands.
- In terms of the organisation groups, we are seeing proportional increases for Public Clients and Train Operators, and large decreases for Infrastructure Contractors and Consultants over the course of the last year.
- For the first time, we have collected attrition data from employers. From data collected on 34% of the workforce through their employers, so a representative sample size, the annual average attrition rate is 8.4% across the sector. This represents one in 12 of the workforce leaving their current employer every year, for reasons that includes retirement, ill health, new role (in rail or an other sector), redundancy, dismissal or even death. If we extrapolate that figure across the sector, the number of people leaving their current employer will be nearly 90,000 by 2030.
- A large proportion of those leaving their employer will be retiring. At an average retirement age in rail of 62, this will equate to a total number of employees potentially leaving the sector through retirement of nearly 47,000 by 2030. These are workers that will need to be replaced.
- If we run three scenarios, using retirement ages of 60, 65 and 67, the numbers projected for 2030 are 57,000 for retirement age 60, 31,000 for retirement age 65 and 22,300 for retirement age 67.
- From an Operating and Capital Expenditure perspective, UK rail spends £20.3b per annum on average between 2025 and 2029. This is made up of 48% Capital Projects (Enhancements and Renewals), 26% Operations (both Train and Infrastructure), 14% Maintenance (both

infrastructure and rolling stock) and 12% Corporate Services activities.

- Looking at the proportion of workers in various asset types, Operations has the highest at 26%, followed by Track at 17.6%, Signalling & Telecomms at 12.6%, Civils Works at 12.1%, Business Management at 10.7% and the other asset types making up the remaining 25% or so.
- London has the highest proportion of expenditure at 24.1%, the South East at 15%, North West at 11.4% and Yorkshire & The Humber at 10.6%. The other regions make up the remaining 35% or so.
- As expected, the workforce required to deliver the investment fluctuates between 2025 and 2029, primarily as a result of the CAPEX spend profile. Peaking in 2028 at just under 224,000, the forecast then drops in 2029 to just over 214,500. This is mainly as a result of the decrease in CAPEX spend towards the end of CP7.
- When calculating the 'gap analysis' (the difference between what workforce is required, and what is available less those predicted to retire), we can see that we have deficits in 2025 to 2028, where it peaks at around 8,269, to a surplus in 2029. Those deficits are as a result of Capital Projects and Operations activities, with Maintenance remaining mainly flat.
- In terms of specific asset type deficits, we can see deficits in Operations, Signalling & Telecoms, Systems Engineering, Traction & Rolling Stock and Electrification activities.
- The roles that are showing as most in deficit over the five-year period are Engineer (across most asset types), Train Driver, Technician, Tester, Operations Manager, Project and Project Control Manager and Signaller. All of these have an average annual deficit of over 100 per annum from 2025 to 2029.
- NSAR believes that the cost to CAPEX activities can be as high as £720m per annum, as a result of higher costs through wage inflation, delays to project completions as a result of staff shortages and loss or delay to project benefit realisation. Spread over a five year period, the costs incurred can run into billions of pounds.
- Between 2025 and 2029, the sector could generate an additional £344m in economic value as a result of jobs created, as well as nearly £122m in social value benefits over the five year period. Our assumption is that 10% of the roles created are 'new' roles and 90% are 'protected' roles (those already existing in the system). For the social value calculations, we assume a different proportion of people coming from a disadvantaged background per skill level ranging from 1% for a Skill Level 7 position to 20% for a Skill Level 2 position.
- We have run different scenarios looking at AI & automation (forecast reduction of 7.5% of the workforce), any variation in public investment level (workforce dependent on increases or decreases in investment levels), the impact of net zero (marginal increase of 1.5% in the workforce) and the impact of other sector competition for talent (reduction of 7.2% in the workforce).

2.2 Recommendations

The skills situation in the UK rail sector tells us we need to act in a planned manner – not rely on random and reactive responses. It also tells us we need to do more collaboratively and with greater collective determination.

We have highlighted nine recommendations for action on what we believe are the top issues facing the sector. By creating a methodology, using data more effectively, building in digital enhancements, generating a new entrants programme and improving the training profile, we hope these recommendations will support the industry in overcoming significant challenges.

Recommendation	Evidence and data
1. Improve workforce demand planning for the long-term.	By taking a more scientific approach to workforce planning, we have projected industry productivity savings of £800m per annum. Taken from lower numbers of workers required, reduced levels of conflict, increased recovery times during operational disruption, reduced rework costs, improved safety culture and adopting a more systems thinking environment – equivalent to around 2.5% of industry costs.
2. Increase the number of younger people in the sector and the diversity. Increase social value / social mobility – move rail up the economic league table.	Proportionally, there are slightly more than half of the under 25s in the sector compared to 2016. Over a five-year period we are still below 2019 levels. 20% of new recruits come from a disadvantaged background. At least 30% are female. Increased EMG representation in engineering disciplines – conservative estimate of £120m over the five year period to 2029.
3. Improve capability, skills mobility and adaptability.	Systematic delivery of a new entrant and upskilling programme for the whole industry, focusing on capability rather than just competence and experience. The outcome is a halving of wage inflation, yielding savings of between £280m and £564m per annum.
4. Increase the number of apprenticeships across the industry by 150%.	The sector employs less than 1% (2,000) new apprentices per annum. This needs to increase by 150% to 5,000 (or 2.5% of the workforce) per annum.

Recommendation

Evidence and data

5. Use supply chain contract levers to create more routes to enter the industry through skills conversion and reskilling schemes.

Short length training programmes to multi-skill existing staff and teams. New lattice of competence to broaden and develop staff and encourage them to invest in their own development. This could affect 40,000 Technicians and 24,000 Managers – saving the industry between £100m and £240m per annum

6. Create more degree apprenticeships and whole industry development schemes.

Rail skill sets at both Technician and Manager level are too narrow. We need staff to have a broader skill set to cope with new technologies and the integration of track and train operational thinking. Saving to the industry of between £100m and £240m per annum

7. Increase quality of training and training capacity. Modernise, simplify and speed up routes to competence.

The number of trainers and assessors has increased by 44 (12.6%) since 2021. Despite this, average age and retirement risk remain high. The average ages of trainers and assessors are significantly higher than the average age of the rail workforce (44 years). A high proportion of trainers and assessors are expected to retire by 2030 – 39% and 40% respectively.

8. Improve productivity – reduce wage inflation / plan for niche skills needs / meet green objectives.

The sector needs to implement a productivity plan, of which many of the people and skills elements in this report are prominent. It needs to be collaborative, funded, measurable and tracked.

9. Plan for the impact of digital and other new tech skills.

With the emergence of new rail technologies, new skills will need to be considered pertaining to the development of electric vehicles, signalling engineering to fit new systems and predictive asset monitoring equipment. It is estimated that 12% (around 30,000) of the workforce will need to be reskilled.



3.0 Investment levels to 2029

In order to determine what the UK rail sector’s future workforce will be, we need to understand what investment is being undertaken in the sector, when, where, on what activities and on what assets. NSAR’s analysis has shown that the rail sector will invest approximately £20.3bn per annum over the next five years to 2029, as per Figure 1.

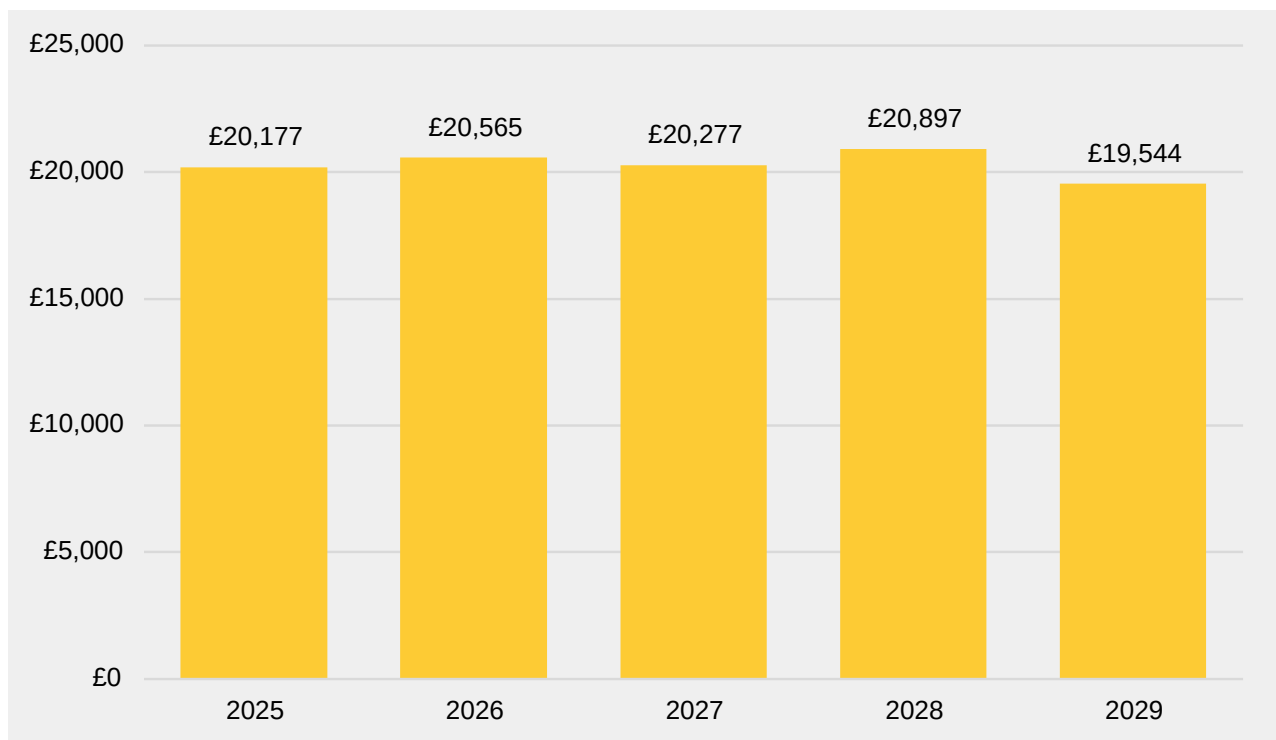


Figure 1 Total investment in UK rail (2025 to 2029) £m

In terms of what activities that investment is spent on, Figure 2 and Figure 3 demonstrate how it will be deployed against each work type over the period 2025 to 2029.

Work type	2025	2026	2027	2028	2029	TOTALS
Capital Projects	£9,548	£10,068	£9,754	£10,419	£9,034	£48,822
Corporate Services	£2,476	£2,307	£2,316	£2,287	£2,308	£11,695
Maintenance	£2,888	£2,888	£2,899	£2,899	£2,899	£14,473
Operations	£5,266	£5,303	£5,308	£5,292	£5,303	£26,471
Grand total	£20,177	£20,565	£20,277	£20,897	£19,544	£101,462

Figure 2 Total investment in UK rail by work type (2025 to 2029) £m

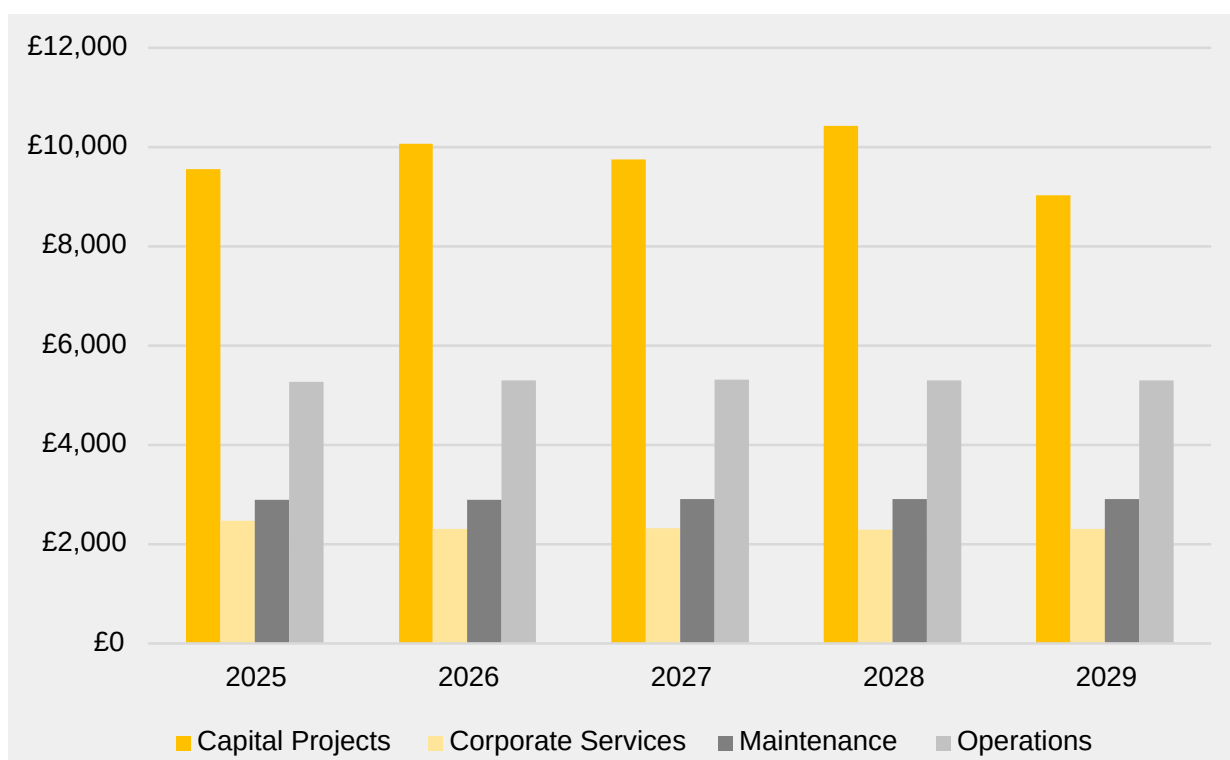


Figure 3 Total investment in UK rail by work type (2025 to 2029) £m

In terms of what that assets investment is spent on, Figure 4 and Figure 5 demonstrate how it will be deployed against each work type over the period 2025 to 2029.

Asset type	2025	2026	2027	2028	2029	TOTALS	
Business Management	£2,305	£2,153	£2,161	£2,128	£2,145	£10,892	10.7%

Asset type	2025	2026	2027	2028	2029	TOTALS	
Civils & Structures	£2,472	£2,558	£2,345	£2,502	£2,384	£12,262	12.1%
Electrification & Plant	£1,363	£1,292	£1,271	£1,353	£1,272	£6,550	6.5%
Operations	£5,266	£5,303	£5,308	£5,292	£5,303	£26,471	26.1%
Property, Stations & Depots	£1,216	£1,412	£1,225	£1,068	£748	£5,669	5.6%
Signalling & Telecomms	£2,388	£2,478	£2,560	£2,788	£2,523	£12,736	12.6%
Systems Engineering	£654	£684	£717	£746	£709	£3,510	3.5%
Track	£3,579	£3,607	£3,578	£3,723	£3,419	£17,907	17.6%
Traction & Rolling Stock	£935	£1,079	£1,112	£1,296	£1,041	£5,463	5.4%
Grand Total	£20,177	£20,565	£20,277	£20,897	£19,544	£101,462	100.0%

Figure 4 Total investment in UK rail by asset type (2025 to 2029) £m

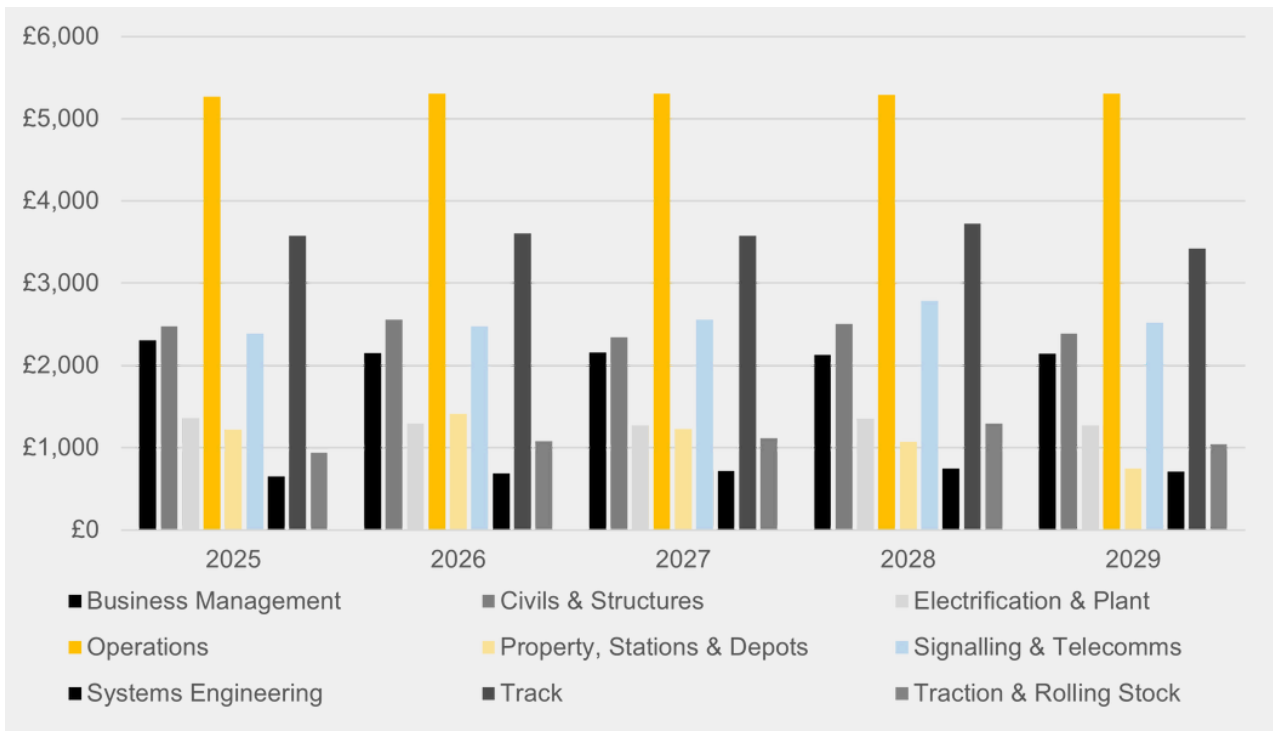
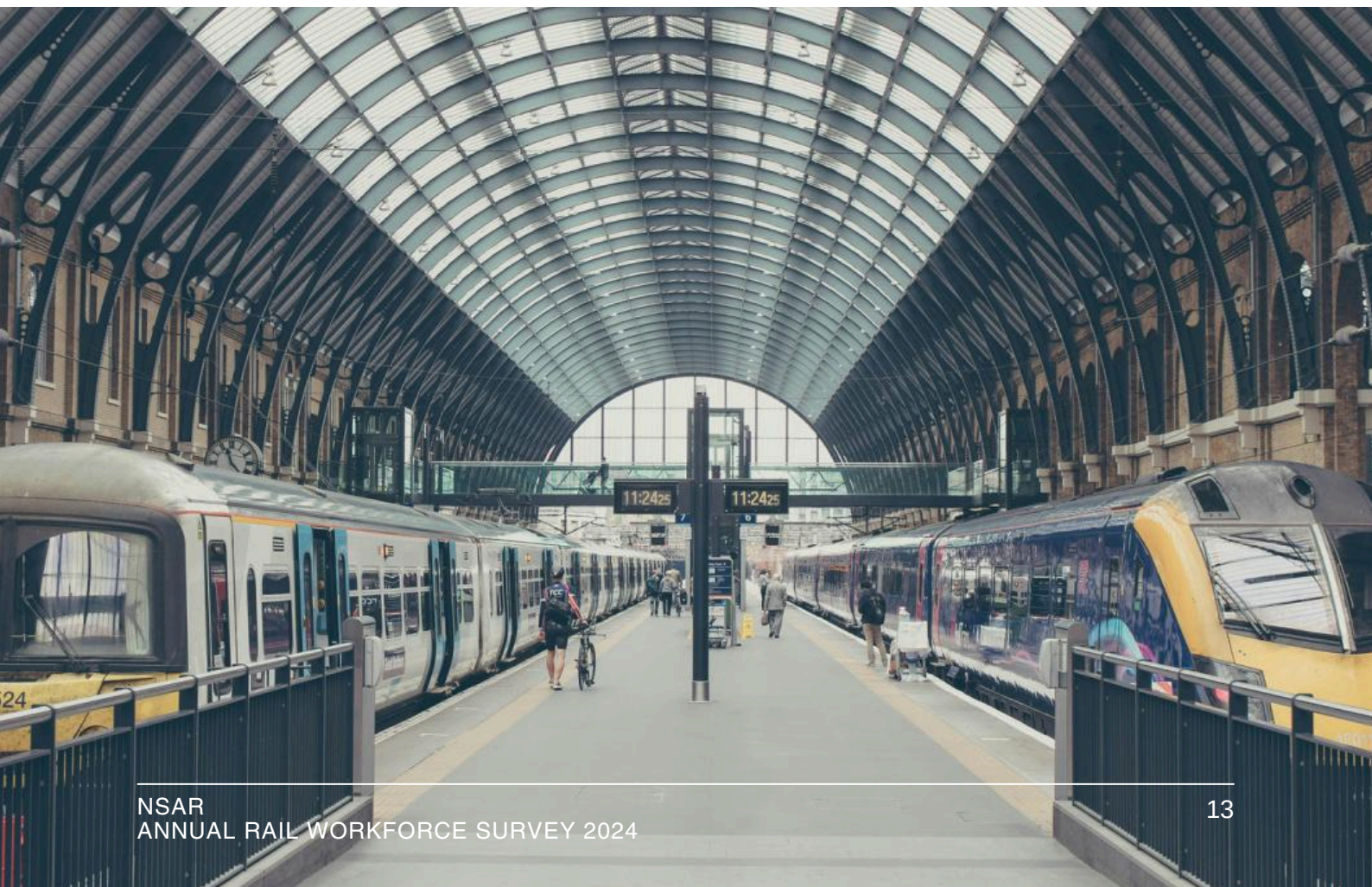


Figure 5 Total investment in UK rail by asset type (2025 to 2029) £m

Finally, we look at where that investment will be deployed by UK region over the period 2025 to 2029.

UK region	2025	2026	2027	2028	2029	TOTALS	
East Midlands	£1,013	£974	£1,020	£1,078	£1,033	£5,118	5.0%
East of England	£1,302	£1,300	£1,300	£1,228	£1,204	£6,334	6.2%
London	£4,931	£4,927	£4,904	£4,910	£4,831	£24,502	24.1%
North East	£596	£597	£597	£669	£669	£3,128	3.1%
North West	£2,253	£2,455	£2,280	£2,568	£2,038	£11,593	11.4%
Scotland	£1,295	£1,285	£1,286	£1,288	£1,291	£6,445	6.4%
South East	£3,197	£3,168	£3,156	£2,967	£2,776	£15,263	15.0%
South West	£1,078	£1,068	£1,069	£1,108	£1,111	£5,434	5.4%
Wales	£913	£896	£897	£898	£899	£4,502	4.4%
West Midlands	£1,711	£1,662	£1,607	£1,854	£1,506	£8,340	8.2%
Yorkshire & The Humber	£1,888	£2,233	£2,163	£2,331	£2,186	£10,801	10.6%
Grand Total	£20,177	£20,565	£20,277	£20,897	£19,544	£101,462	100.0%

Figure 6 Total investment in UK rail by UK region (2025 to 2029)





4.0 Future workforce required and key skills shortages

In order to understand future levels of demand and future skills and role gaps, we need to be able to calculate what the replacement demand is for those potentially retiring from the workforce, as well as the additional demand arising from specific types of work. This allows us to compare a notional future workforce at any point in time, or location, or work type, or asset type with what we have today in the workforce – thus creating an understanding of what gaps need to be filled.

4.1 Future workforce required

The modelling calculates a future workforce by creating algorithms that breakdown the amounts of money being invested in a notional workforce, using a process of ‘workforce pyramids’. For example, for each pound that is spent undertaking a particular activity, there will be a proportion of that money spent on labour, in a particular work type and asset type. We then extrapolate that to get a notional future workforce based upon the investment level provided. Figure 7 indicates what that notional future workforce will be over the next five years.

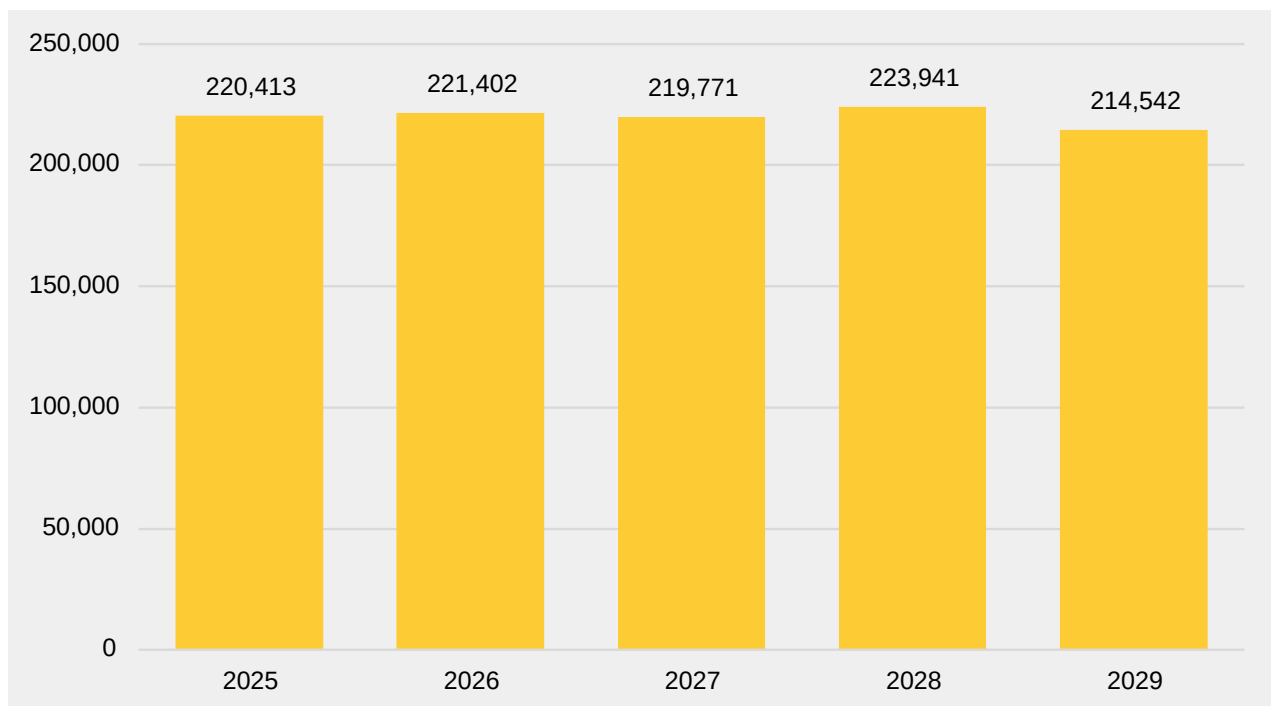


Figure 7 Future workforce required in UK rail (2025 to 2029)

We can breakdown the notional future workforce into four work types, as per Figure 8. The main variability occurs, as would be expected, in the Capital Projects work type, where the level of investment spend is the most variable.

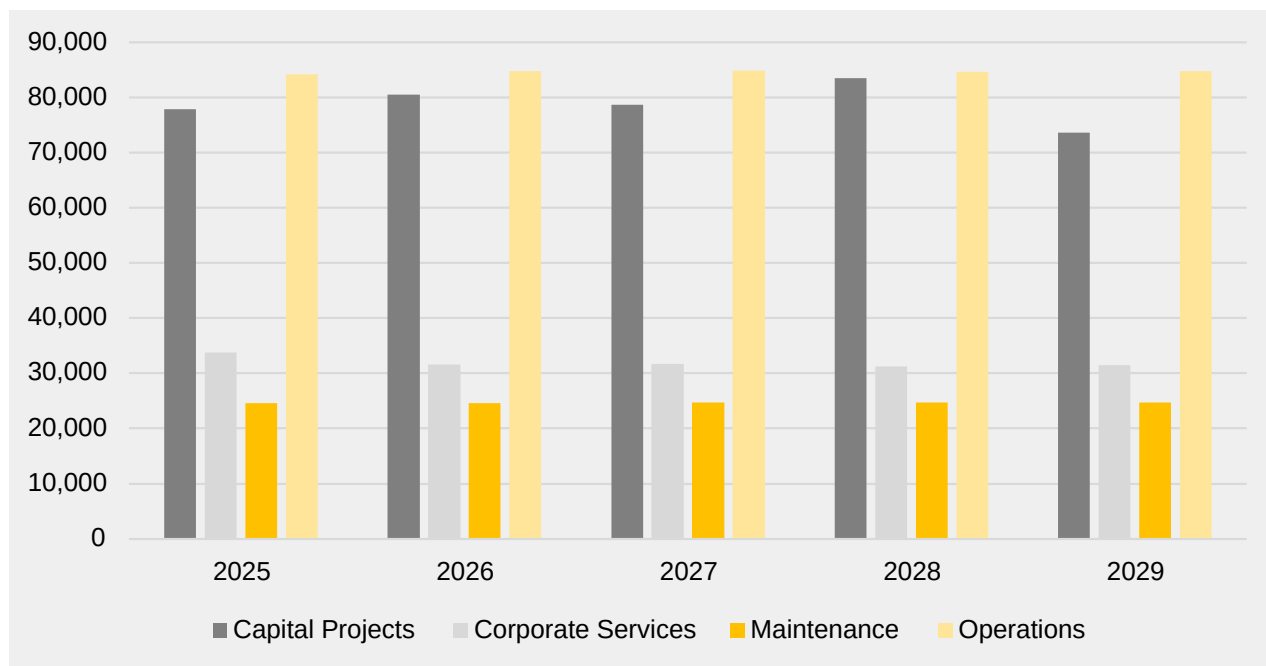


Figure 8 Future workforce in UK rail required by work type (2025 to 2029)

We can also breakdown the notional future workforce into our nine asset types, as per Figure 9.

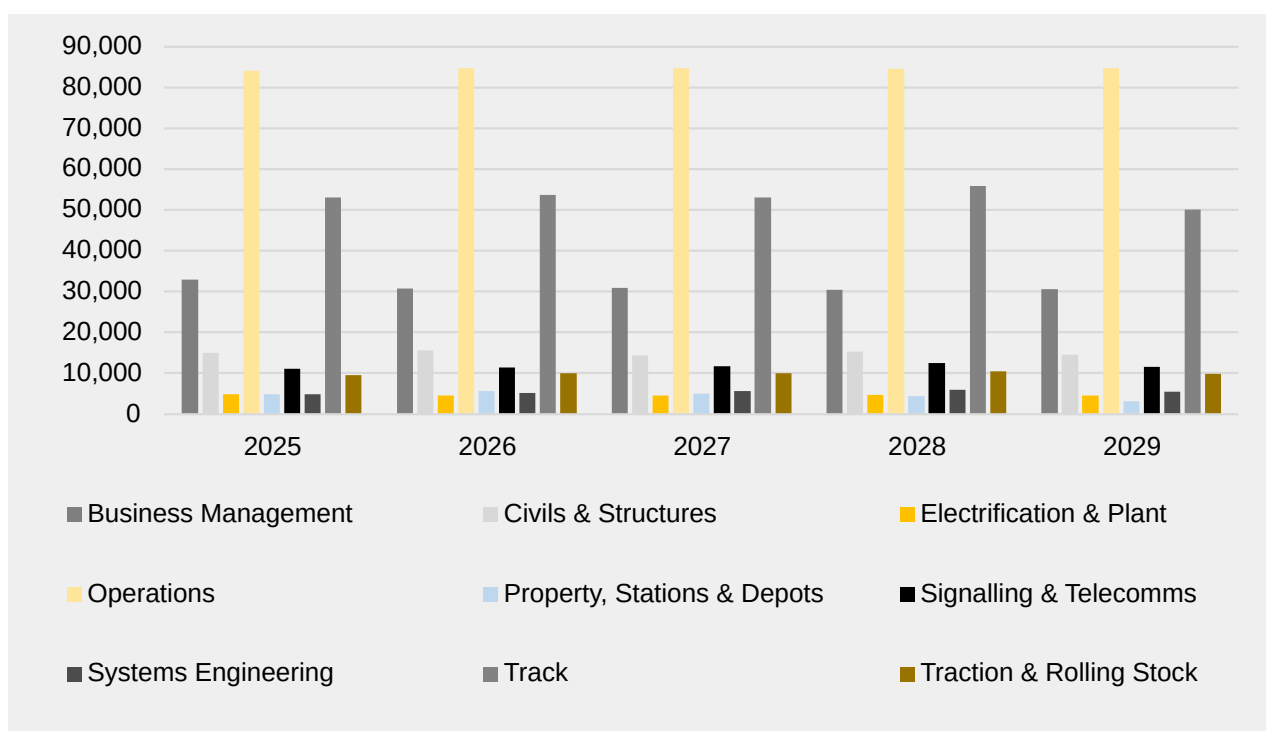


Figure 9 Future workforce in UK rail required by asset type (2025 to 2029)

Finally, we can breakdown the notional future workforce into the eleven UK Regions too, as per Figure 10.

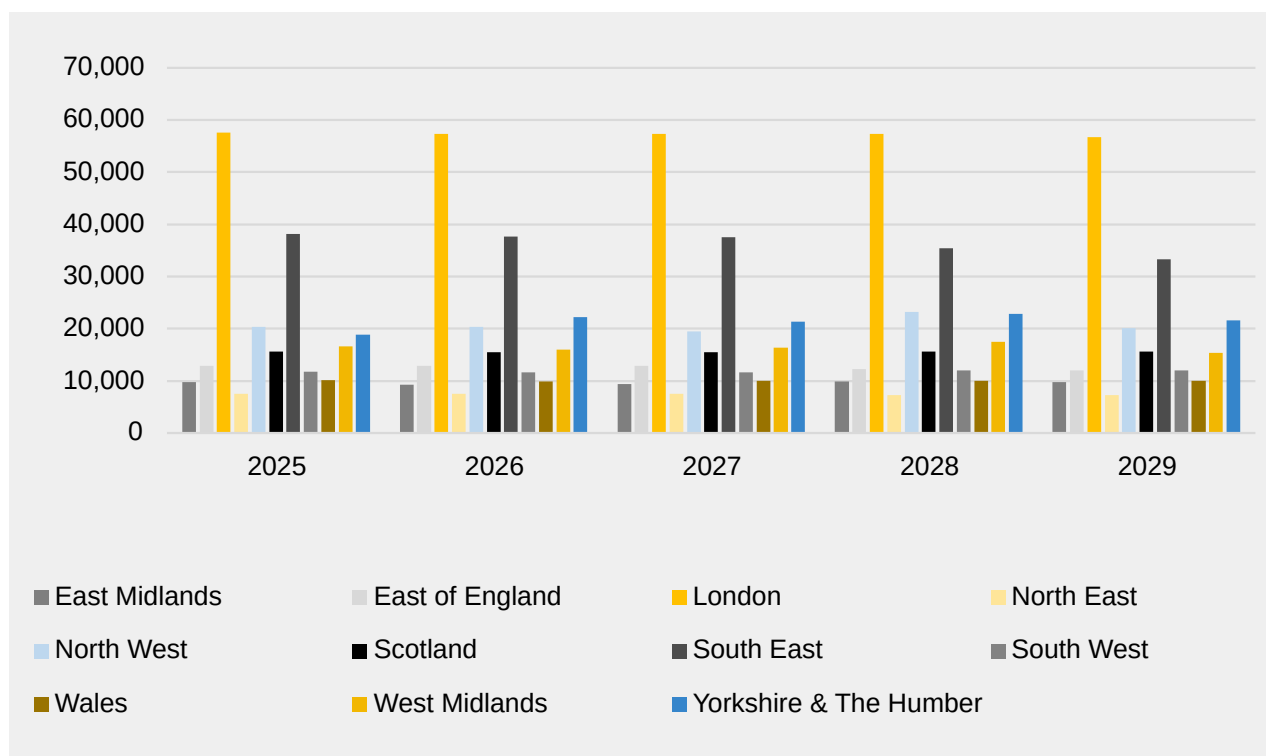


Figure 10 Future workforce required in UK rail by UK Region (2025 to 2029)

4.2 Replacement demand

Using a retirement age profile of 62, which is shown to be the current industry norm, there are approximately 46,700 workers in the sector who will reach that age by 2030. Of those, nearly half (46%) are in Operations roles (predominantly Train Drivers, Operations Managers, Customer Service Managers and Signallers), 29% are in Capital Projects roles (Engineers, Operatives and Technicians), 13% in Corporate Services roles and 12% in Maintenance roles.

Figure 11 indicates roles where replacement demand is likely to be the most acute. These are roles where there are more than 500 workers and where the average age is higher than the 44.1 rail sector average age.

Job role	Average age
Trainer	50.2
Director	50.2
Driver Manager	49.2
Customer Service Manager	48.9
Train Driver	48.1
Senior Project Manager	48.1
Operator	47.8

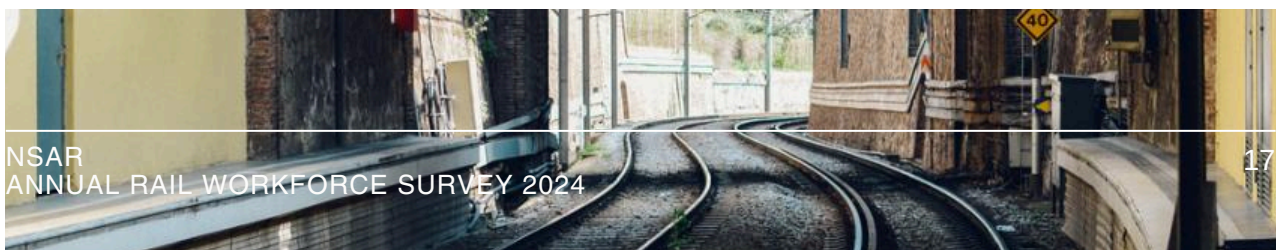
Job Role	Average Age
HSQE Manager	47.6
Maintenance Fitter	47.3
Maintenance Manager	47.2
Operations Manager	46.8
Supervisor	46.8
Finance Supervisor	46.2
Senior Business Manager	46.0
Customer Service Assistant	45.7
Signaller	45.6
Finance Manager	45.5
Business Manager	45.5
Maintenance Supervisor	45.3
Engineer	45.2
Project Manager	45.1
Co-ordinator	44.9
Operations Assistant	44.9
Administrator	44.8
Assistant Project Manager	44.6
IT & Technology Manager	44.5
Operative	44.3

Figure 11 Table of job roles with the highest average age

4.3 Using gap analysis to identify key shortages

Having developed a notional future workforce over the next five years, and understood where the risks are most acute from a potential replacement demand perspective, comparisons can be made against the workforce we have today. The following charts show what our potential gap would be, even if we replaced those who we have earmarked for potential retirement.

Figure 12 shows the total gap analysis across the sector over the next five years, indicating we will be running a deficit between 2025 and 2028, and only running a surplus by 2029. It should be noted that each figure refers to the position within the year itself, and factors such as attrition are not applied cumulatively to this analysis.



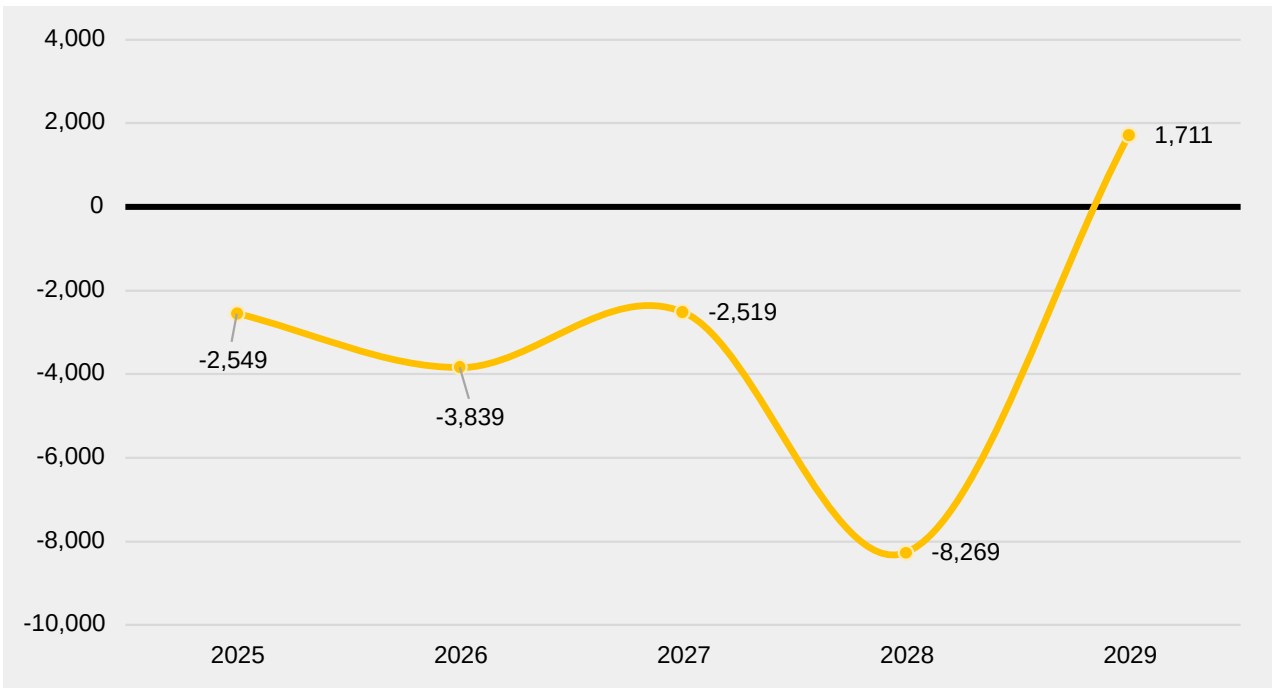


Figure 12 Gap analysis in the UK rail workforce (2025 to 2029)

The largest deficit appears in 2028, at nearly 8,300 workers, indicating some projects will either have to pay more for scarce resources or project deadlines will be missed because of a lack of critical resource.

When we look at the gap analysis by work type in Figure 13, we can see large fluctuations over the five year period for Capital Projects, with the other work types remaining relatively consistent.

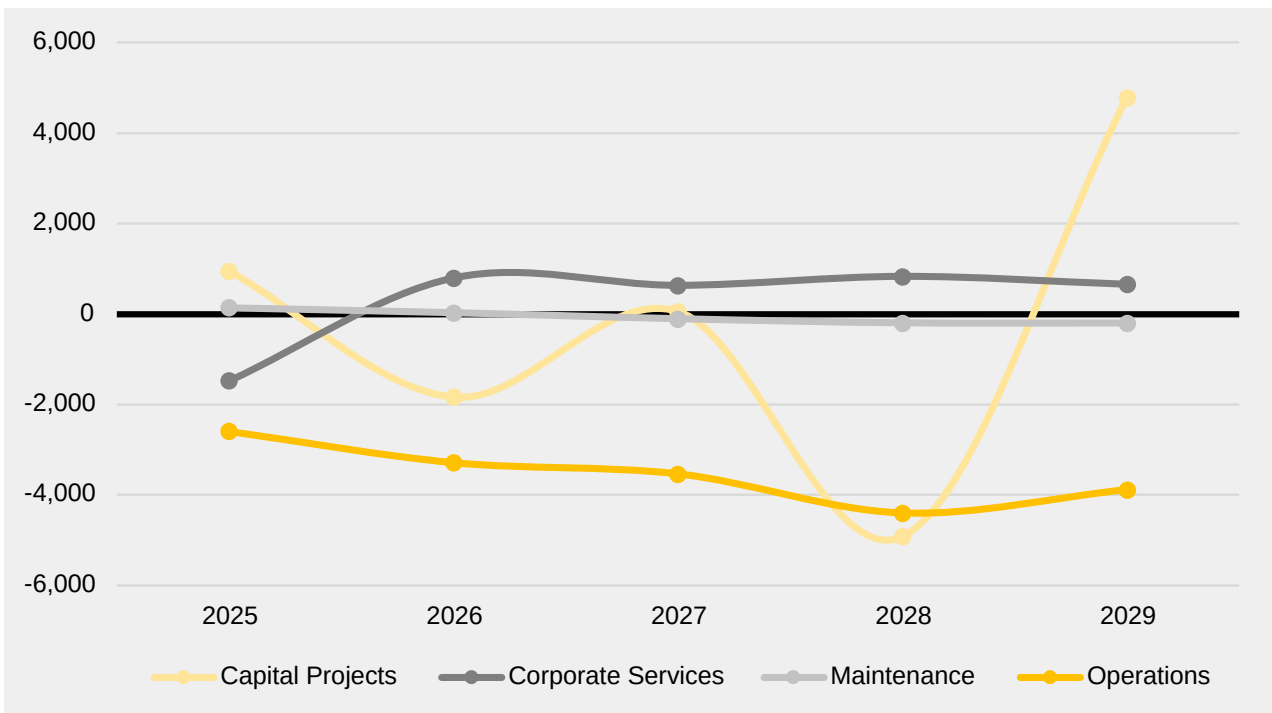


Figure 13 Gap analysis in the UK rail workforce by work type (2025 to 2029)

When we look at the gap analysis by asset type in Figure 14, we can see a consistent deficit in Operations resource levels, probably driven by retirement numbers and age demographics over the five-year period, with the other asset types remaining relatively consistent. A tail off in investment levels in 2029 yields a surplus of workers in that year, particularly in the Track asset type.

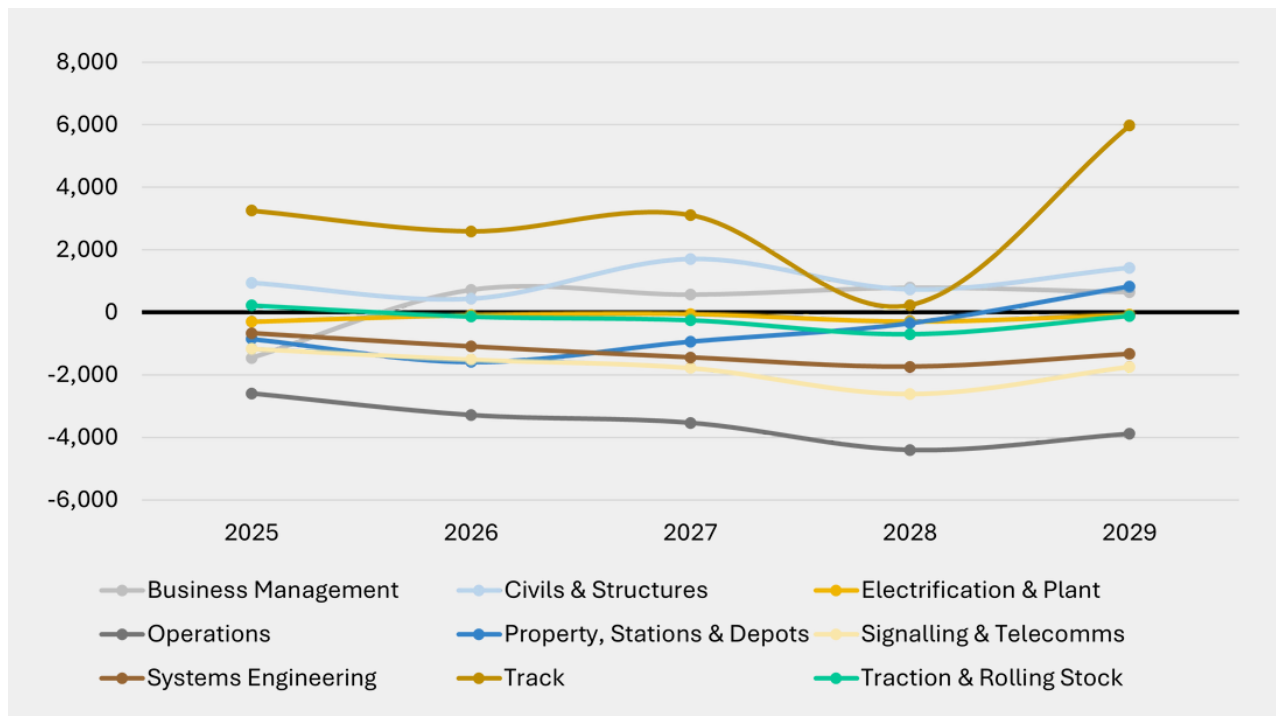


Figure 14 Gap analysis in the UK rail workforce by asset type (2025 to 2029)

In addition, we can look at the breakdown of any deficit or surplus by skill level, as can be seen in Figure 15.

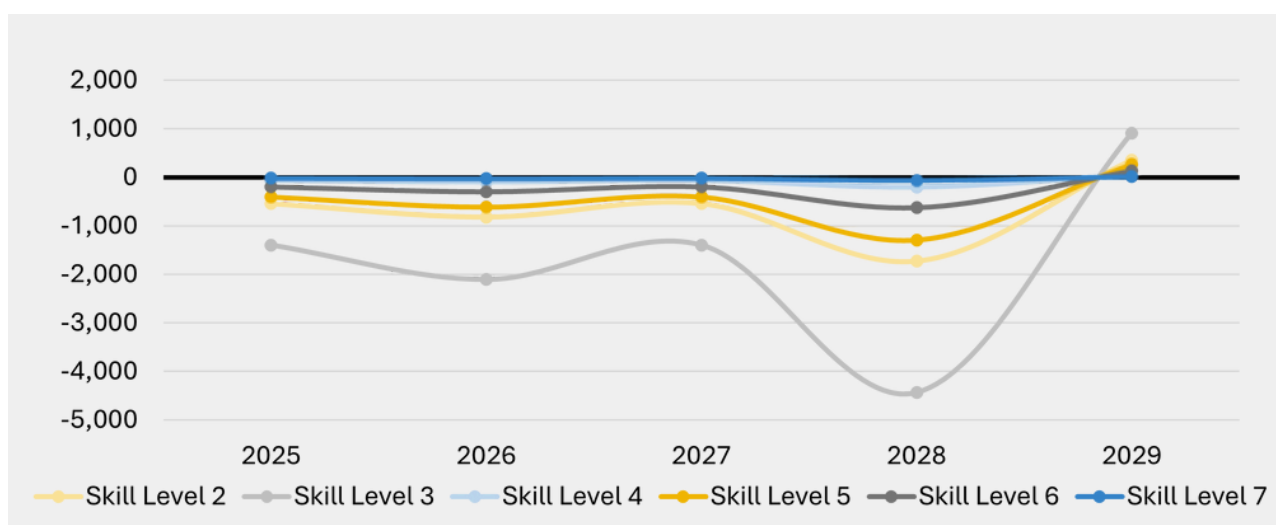


Figure 15 Gap analysis in the UK rail workforce by skill level (2025 to 2029)

The largest deficit can be seen in Skill Level 3, encompassing roles such as Train Drivers, Signallers and Technicians. All other skill levels are at a deficit between 2025 and 2028, with Level 2 and Level 5 occupations the most acute (after Level 3).

Figure 16 below shows the table of where the roles are in most deficit over the 5 year period.

Job Role	Skill Level	2025	2026	2027	2028	2029	TOTALS	Annual
Engineer	Skill Level 6	-221	-527	-683	-1179	-491	-3101	-620
Customer Service Assistant	Skill Level 2	-440	-623	-645	-569	-622	-2899	-580
Train Driver	Skill Level 3	-411	-583	-603	-533	-582	-2712	-542
Maintenance Technician	Skill Level 3	-627	-1303	-667	-212	906	-1903	-381
Tester	Skill Level 6	-160	-219	-268	-386	-245	-1278	-256
Operations Manager	Skill Level 5	-162	-230	-238	-210	-230	-1070	-214
Project Control Manager	Skill Level 5	-111	-102	-129	-233	-85	-660	-132
Signaller	Skill Level 3	-90	-128	-132	-117	-128	-595	-119
Project Manager	Skill Level 6	-69	-111	-118	-325	77	-546	-109

Figure 16 Gap analysis in the UK rail workforce by job role (2025 to 2029)



5.0 Cost of skills shortages

Analysis of the current labour statistics (ONS August 2024) estimates a tight market, with employment at 75% of 16-64 working age group. The unemployment rate is 4% (those people actively looking and available to start work). There are currently 22.2% of people defined as 'economically inactive', representing a significant pool of potential employees[1]. This is a pool of resources that is potentially available, however they would likely require either a strong network of support or incentives to consider joining the workforce.

Not having the right skills or people in place when you need them causes costs to escalate or performance to weaken in the UK rail sector. For OPEX type activities, it could lead to train cancellations, train service delays, higher numbers of asset failures and slower recovery periods of normal service running. For CAPEX activities, such as renewals or enhancements, we can determine a figure that can be used for business case purposes to improve or recruit more skilled workers. In the UK rail sector, we believe that the cost to CAPEX activities can be as high as £720m per annum, as a result of higher costs through wage inflation, delays to project completions as a result of staff shortages and loss or delay to project benefit realisation. Spread over a five year period, the costs incurred can run into billions of pounds.

5.1 Economic and social value

New job opportunities allow for the generation of both economic and social value. Looking at the size of the anticipated skills gaps from the analysis in this report, there are significant social value opportunities in both new projects and from replacing retirees. As with entry to any new role, training requirements are implied. However, targeting different pools of talent will help the sector diversify.

We have estimated that the additional economic value generated from just 10% of the roles going to those who are currently economically inactive is £39 million. Upping this value to an ambitious figure of 20%, would generate an economic value of over £76 million. Evidence shows that HS2 are regularly achieving 10%, so 20% is a stretch target.

There is the opportunity to generate £344 million cumulatively for the UK economy from filling the gaps in the rail sector between now and 2029. The height of demand is in 2028, as illustrated in Figure 17, with most value created in roles at Skill Level 3, which implies the sector should be targeting school leavers, probably on Level 3 apprenticeships. The realisation of this value will require improving promotion, attraction and retention of employees, as well as making a commitment to training and upskilling existing employees. Workforce planning can support in the achievement of this level of economic value.

[1] The definition of 'economically inactive' means people (aged 16-64) that are not involved in the labour market – they are neither working nor actively seeking employment. Economic inactivity includes students, early retirees and the long-term sick.

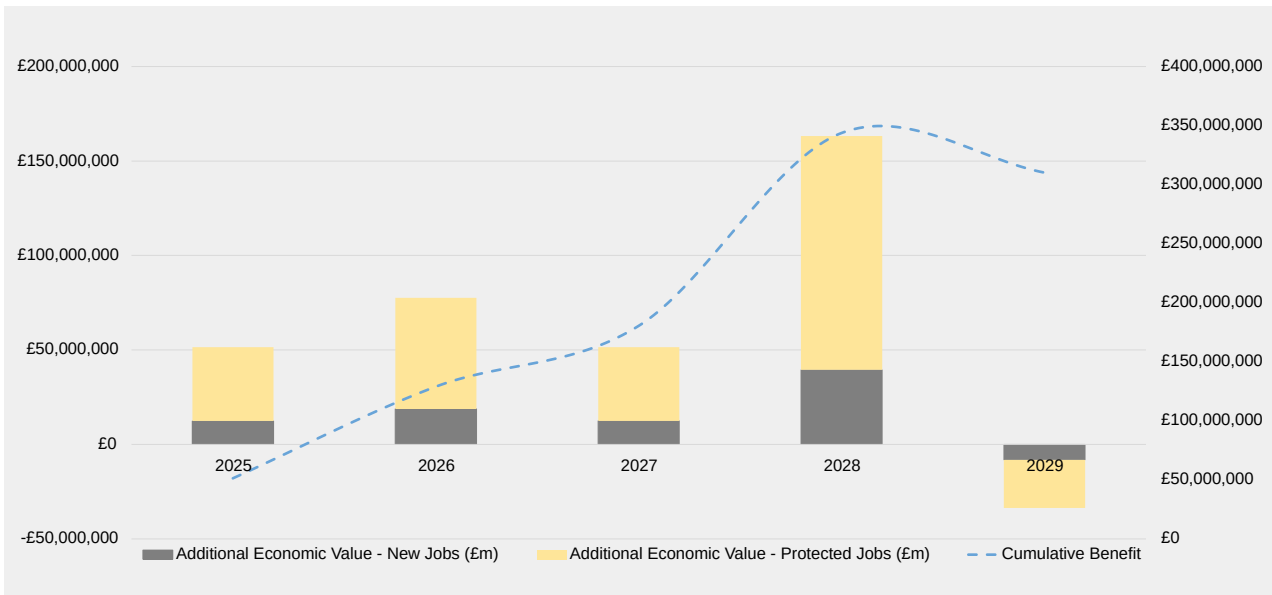


Figure 17 Economic value benefits profile for UK rail between 2025 and 2029

Furthermore, there is the opportunity to generate social value from employing those currently not contributing to the UK economy[2]. Using the assumption that 20% of roles at Levels 2 and 3 are filled by new employees from a disadvantaged background, the rail sector could produce an additional £122m in social value by 2029, as shown in Figure 18.

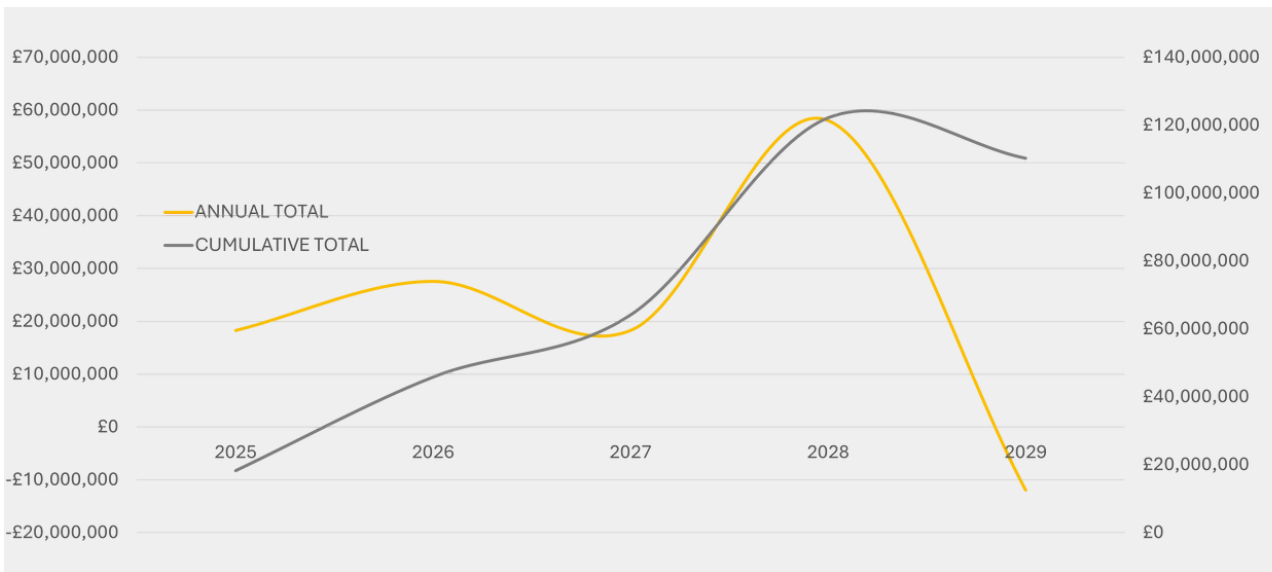


Figure 18 Social value benefits profile for UK rail between 2025 and 2029



[2] Social value refers to the benefits that a job provides to society beyond its financial value.

6.0 Current workforce demographics in UK rail

This section looks at different features of the UK rail workforce, particularly gender, ethnicity, age, work type, asset type, skill level, UK region and organisation group.

6.1 Overall numbers

The results of our 2024 Annual Workforce Survey indicate that the size of the workforce has diminished by 9% since 2023 to a value of 220,501. Figure 19 shows that the workforce is now the size it was in 2017 after 6 years of steady growth. Our data collection processes are becoming more sophisticated and our confidence levels in these figures are higher than ever.

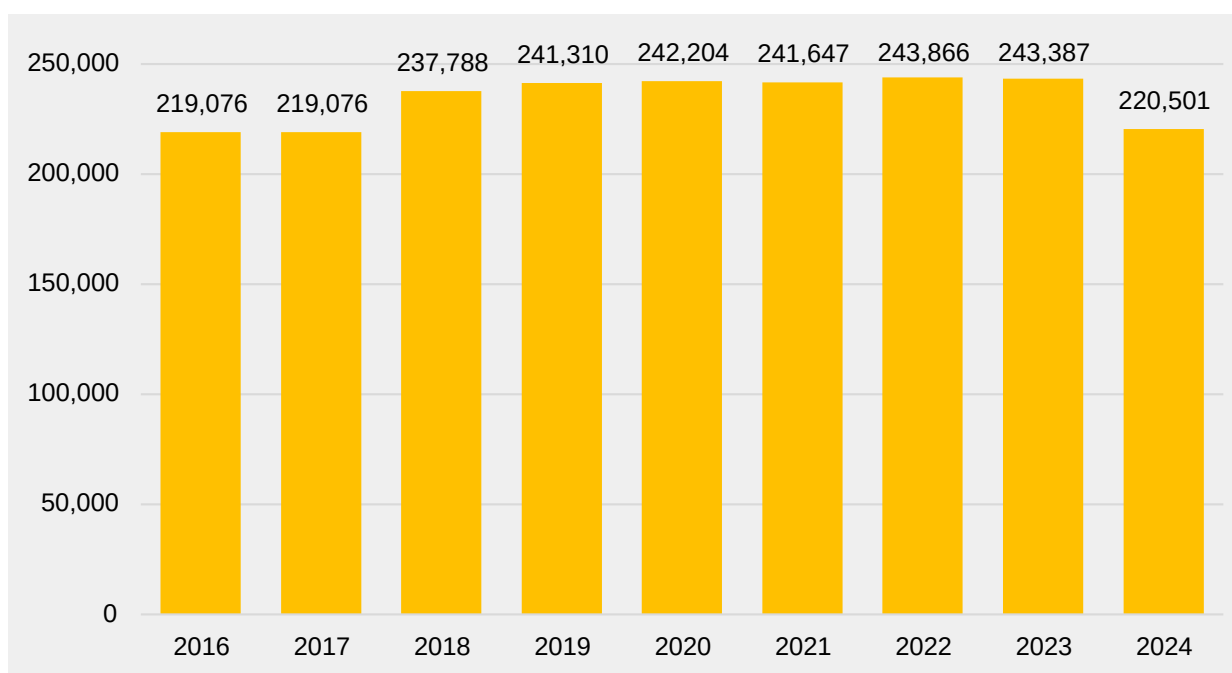


Figure 19 Size of UK rail workforce since 2016

The principal reason for this reduction in the workforce comes from the supply chain rather than infrastructure owners, maintainers, train or freight operators. This may be as result of different factors, which are outlined below:

- Uncertainty over the capital spend pipeline, meaning supply chain companies are less willing to invest in replacing staff who leave.
- Inability to find suitably qualified and experienced staff who leave.

- A reduction in the number of people in the available supply of workers as a result of the twin shocks of BREXIT and the pandemic.
- Stronger competition from other sectors where some equivalent skills are in higher demand.

Given we are at the commencement of a new Control Period, and significant structural and organisational changes are underway or planned across the sector, it is a concern that the workforce in the supply chain is reducing, putting higher pressure on the sector’s ability to meet the plans outlined in CP7 and other documents within cost, time, quality and productivity parameters.

6.2 Gender

The results of our 2024 annual workforce survey reveal that the proportion of women in the overall workforce has increased from 16.3% to 17.4%, an increase of 6.8% since 2023. Figure 20 shows how gender proportion in the UK rail workforce has changed since 2016, from 11.2% to a current 17.4%. This represents an increase over the last 8 years of over 55%.

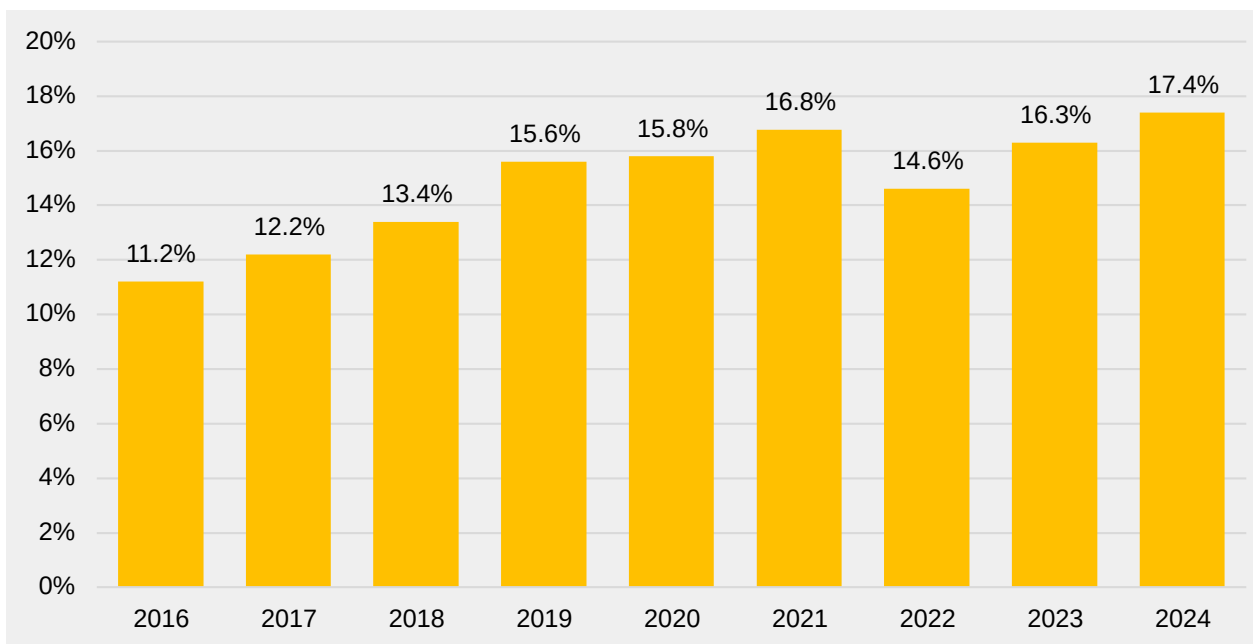


Figure 20 Proportion of women in UK rail since 2016

Whilst this appears a positive result, it is important to understand the gender proportion in relationship to a reduction in the overall workforce numbers of 9.4%. The analysis indicates that progress in encouraging and attracting more women into the UK rail workforce continues to be strong. With a reduction in the overall workforce numbers of 9.4% (approximately 23,000 workers), we have found that 94.3% of those who have left UK rail are men, with only 5.7% women.

6.3 Ethnicity

The results of our 2024 annual workforce survey also reveal that the proportion of workers who form part of an Ethnic Minority Group (EMG) in the overall workforce has increased from 12.3% to 14.4%, an increase of 17.2% since 2023. Figure 21 shows how that EMG proportion in the UK rail workforce has changed since 2018, from 11.5% to a current 14.4%. This represents an increase over the last 6 years of 25%. To put this into context, the proportion of EMG workers in UK employment across all sectors is 19.3%.

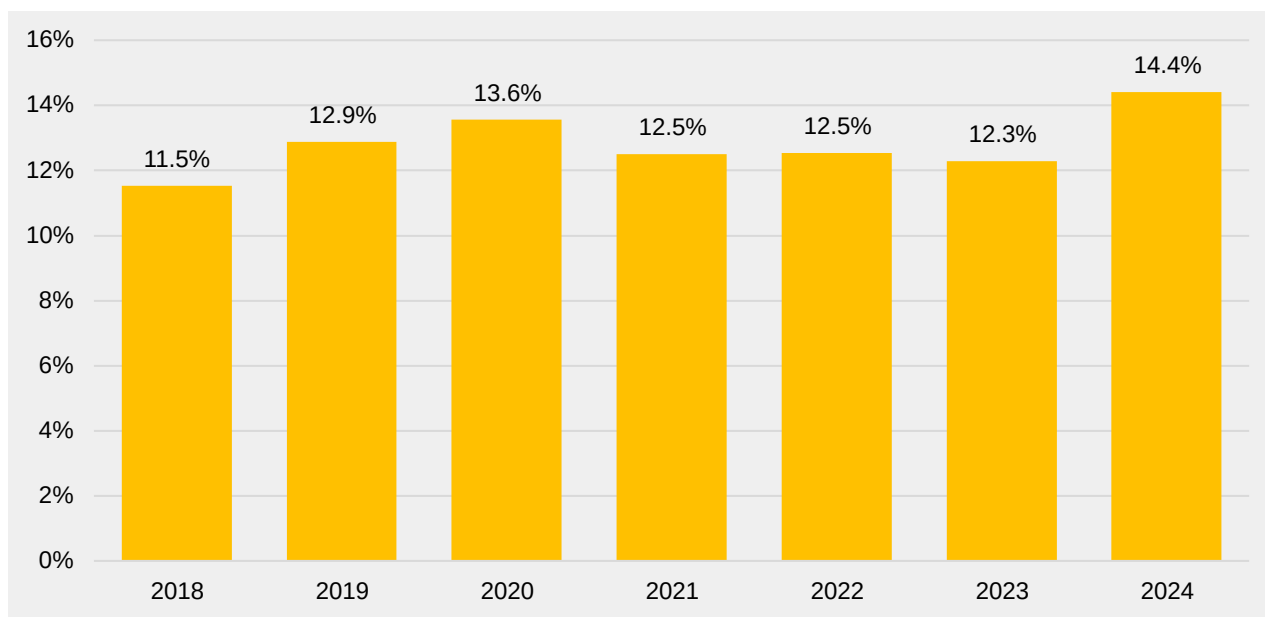


Figure 21 Proportion of EMG workforce in UK rail since 2018

In a similar vein to the gender proportion, it is important to understand the ethnicity proportion in relationship to a reduction in the overall workforce numbers. Again, the analysis indicates strong progress in encouraging and attracting more ethnically diverse workers into the UK rail workforce. With a reduction in the overall workforce numbers of 9.4% (approximately 23,000 workers), we have found that the number of workers from an EMG has actually increased by nearly 2,000, rather than decreased.

6.4 Age

The results of our 2024 Annual Workforce Survey reveal some interesting statistics when it comes to analysis of the age profile. The average age for the sector has reduced to 44.1 amongst all workers, with the average age of men being higher than women by an average of 1.5 years. Figure 22 below shows the spread of age ranges from 16 to 71+ in the UK rail workforce and what the proportion of workers is in each range.

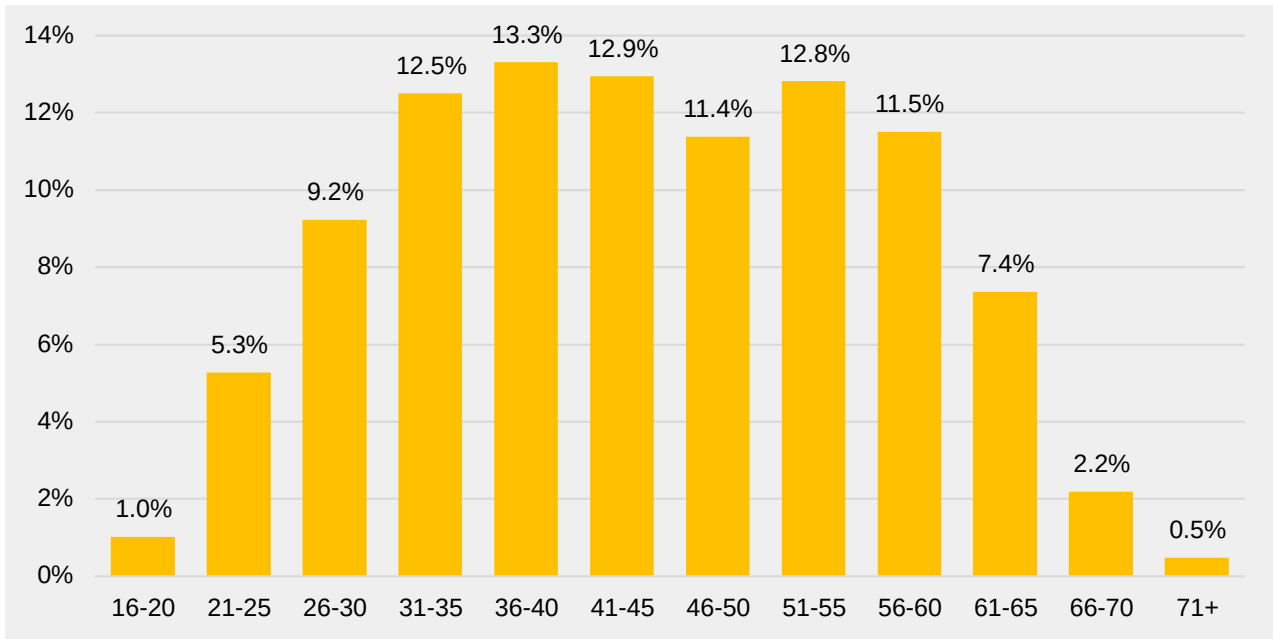


Figure 22 Proportion of age ranges in UK rail in 2024

However, some interesting features emerge when diving into the data and looking at specific age bands.

Our analysis of those aged 25 and under in UK rail can be seen in Figure 23 below. It shows that the downward trend since 2016 of a reducing proportion of people aged 25 and under has been reversed. The proportion is now 6.3%, an increase of 32.7% year on year. Whilst this is very welcome the value remains far below the value in 2016 of 10.3%.

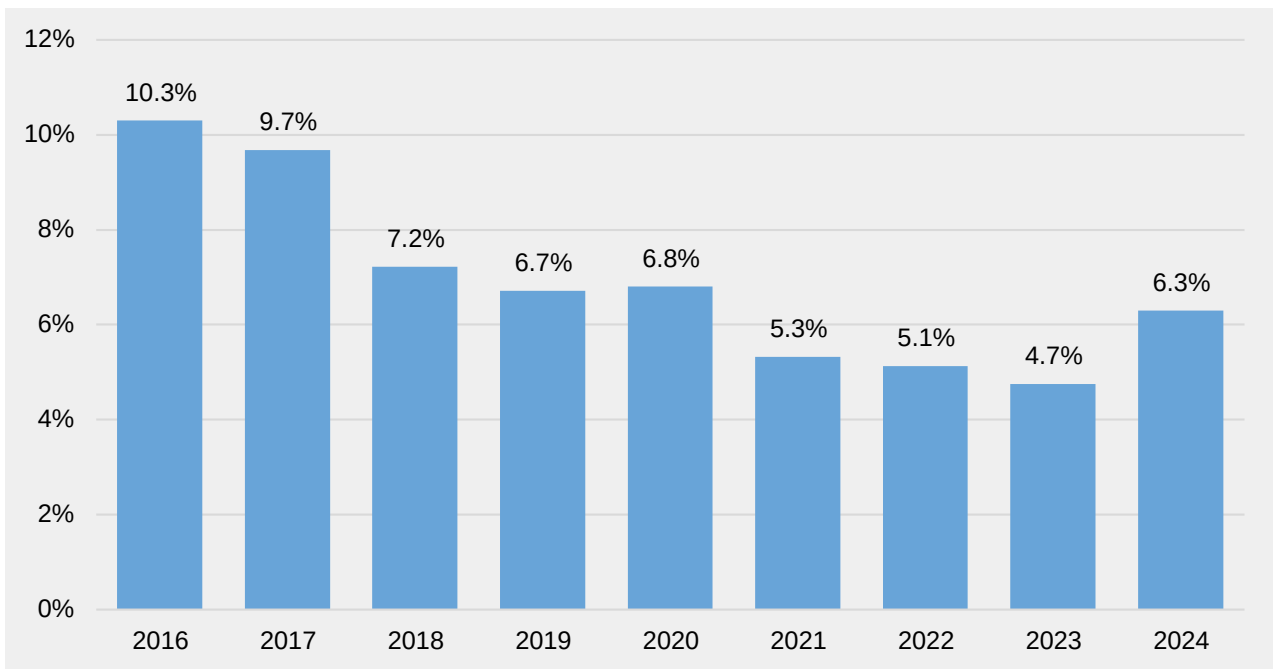


Figure 23 Proportion of those aged 25 and under in UK rail since 2016

In a similar vein to the gender and ethnicity proportions, it is important to understand the proportion of those aged 25 and under in relationship to a reduction in the overall workforce numbers of 9.4%. The analysis indicates progress in encouraging and attracting younger workers into the UK rail workforce. Despite a reduction in the overall workforce numbers of 9.4% (approximately 23,000 workers), we have found that the number of workers aged 25 and under has actually increased by over 2,300, rather than decreased. This represents an increase of 20.2% over the previous year.

Our analysis of those aged 30 and under in UK rail can be seen in Figure 24. It shows that the downward trend since 2016 of a reducing proportion of people aged 30 and under has also been reversed and is now 15.5%, an increase of 15.2% year on year. Whilst this is very welcome, the value remains far below the value in 2016 of 22.8%.

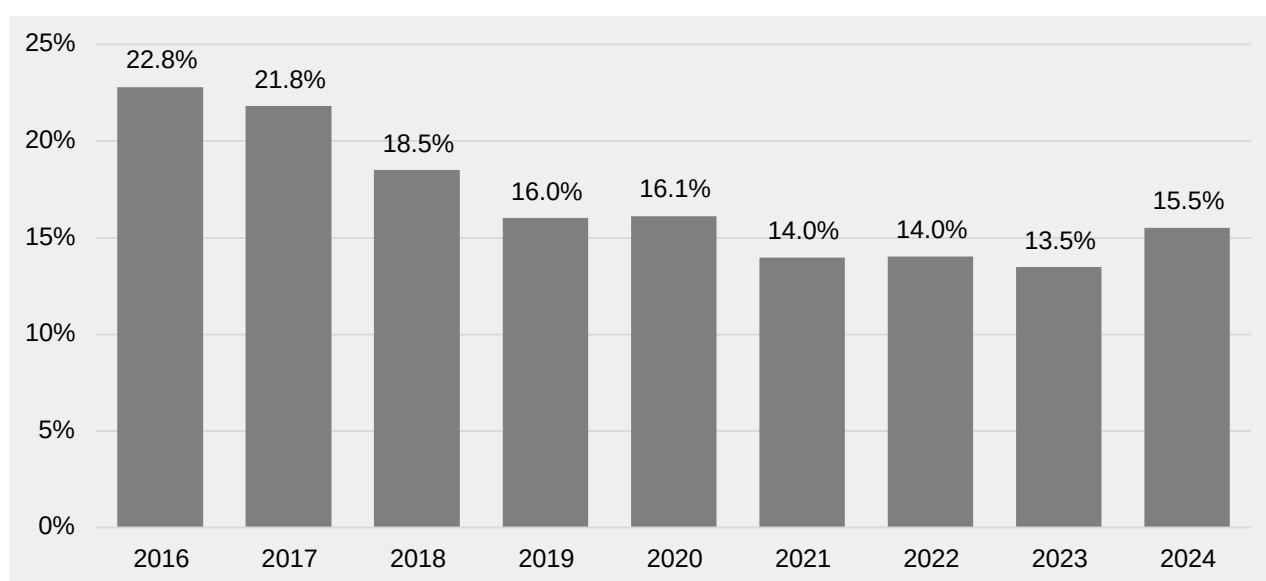


Figure 24 Proportion of those aged 30 and under in UK rail since 2016

Our analysis has also indicated that progress in encouraging and attracting younger workers into the UK rail workforce. The number of workers aged 30 and under has actually increased by nearly 1,500, rather than decreased. This represents an increase of 4.4% over the previous year.

Our analysis of those aged between 31 and 49 in UK rail can be seen in Figure 25 below. It shows that the upward trend since 2016 of an increasing proportion of those age 31 and 49 has been reversed, and is now showing a figure of 43.8%, an alarming decrease of 12.4% year on year. This is a concerning development as it demonstrates we are losing people from the sector who are experienced, developed and knowledgeable in rail.

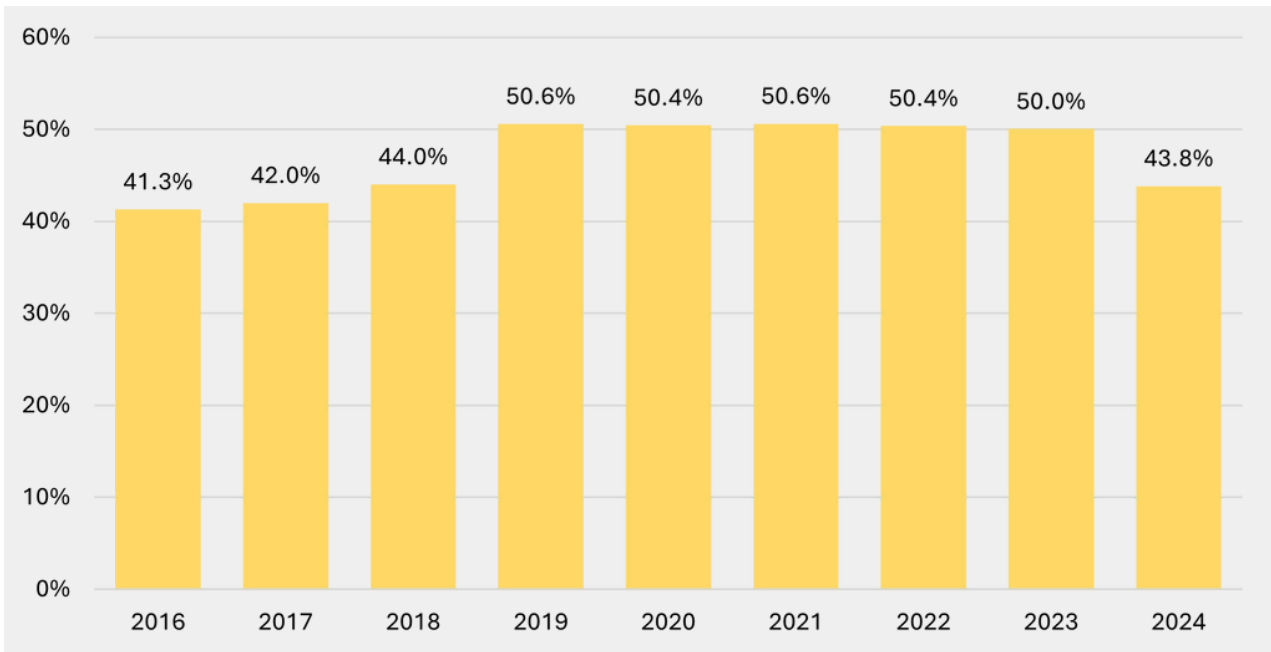


Figure 25 Proportion of those aged between 31 and 49 in UK rail since 2016

Our analysis has also indicated some negative indicators. The number of workers aged between 31 and 49 has decreased by over 25,000. This represents an decrease of 20.6% over the previous year.

Our analysis of those aged 50 and over in UK rail can be seen in Figure 26. It shows that the trend since 2016 of an increasing proportion of those aged 50 and over has been continuing and is now 34.3%, an increase of 8.2% year on year. This remains concerning, given typical retirement profiles in the sector and the challenge posed by replacing those with decades of experience and knowledge.

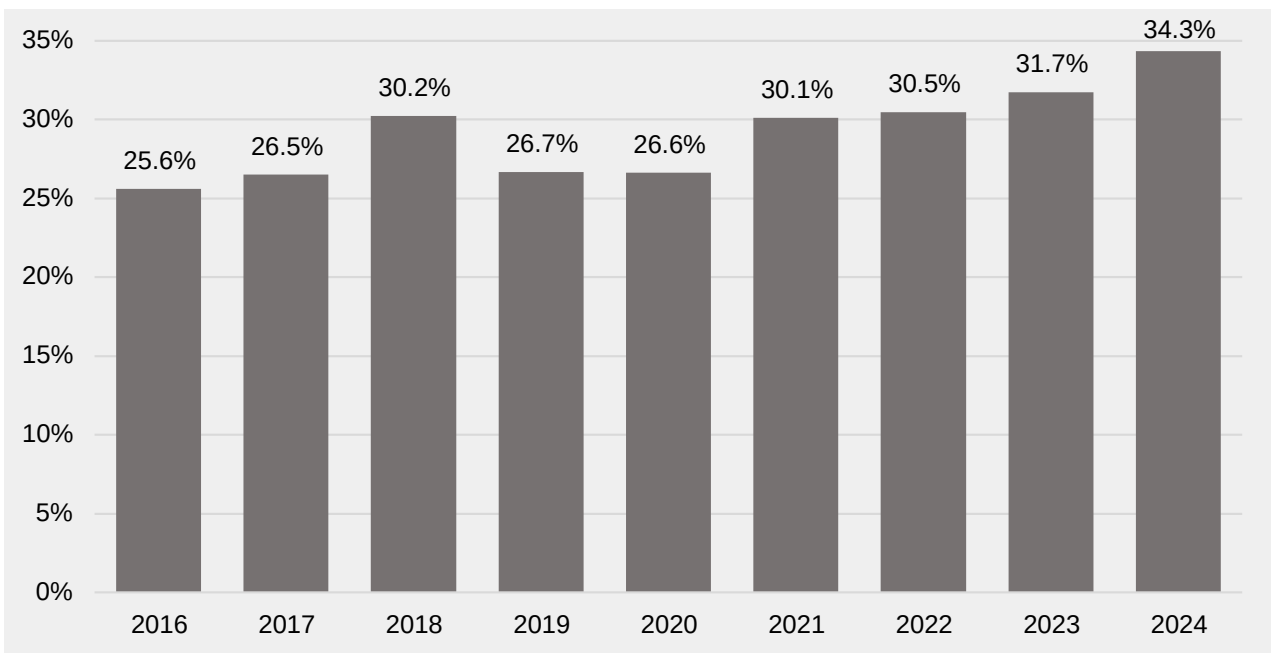


Figure 26 Proportion of those aged 50 and over in UK rail since 2016

The number of workers aged 50 and over has decreased by around 1,500. This represents a decrease of 2% over the previous year.

Looking at the various proportions in a single chart in Figure 27, it is noticeable how the proportion of those aged between 31 and 49 has decreased quite dramatically with an increase in those aged 50 and over. The upturns in those aged 25 and under and 30 and under are positive but need to be sustained and improved year on year.

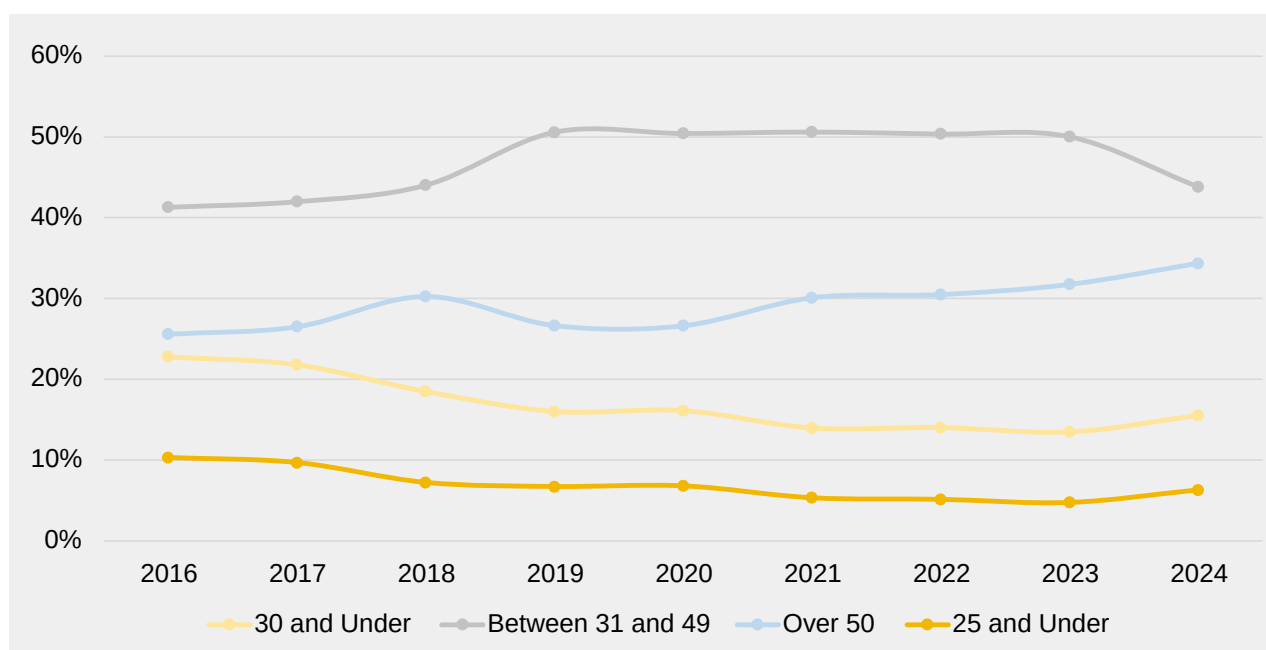


Figure 27 Proportion of workforce in age ranges in UK rail since 2016

6.5 Work type and asset type

One of the key aspects of NSAR’s Annual Workforce Survey is to allocate each job role (not person per se) to a work type and an asset type. Work type describes the type of work that is undertaken and there are four categories: Operations (both Infrastructure and Train), Maintenance, (both Infrastructure and Traction & Rolling Stock), Capital Projects (all Enhancements and Renewals) and Corporate Services (all support service activities). Asset types describe the specific asset that the work type is deployed on and include the following: Business Management, Civils & Structures, Electrification & Plant, Operations, Property Stations & Depots, Signalling & Telecoms, Systems Engineering, Track and Traction & Rolling Stock.

Each job role across the sector is allocated to a specific work type and asset type. The split of roles across the sector across work types is demonstrated in Figure 28 below.

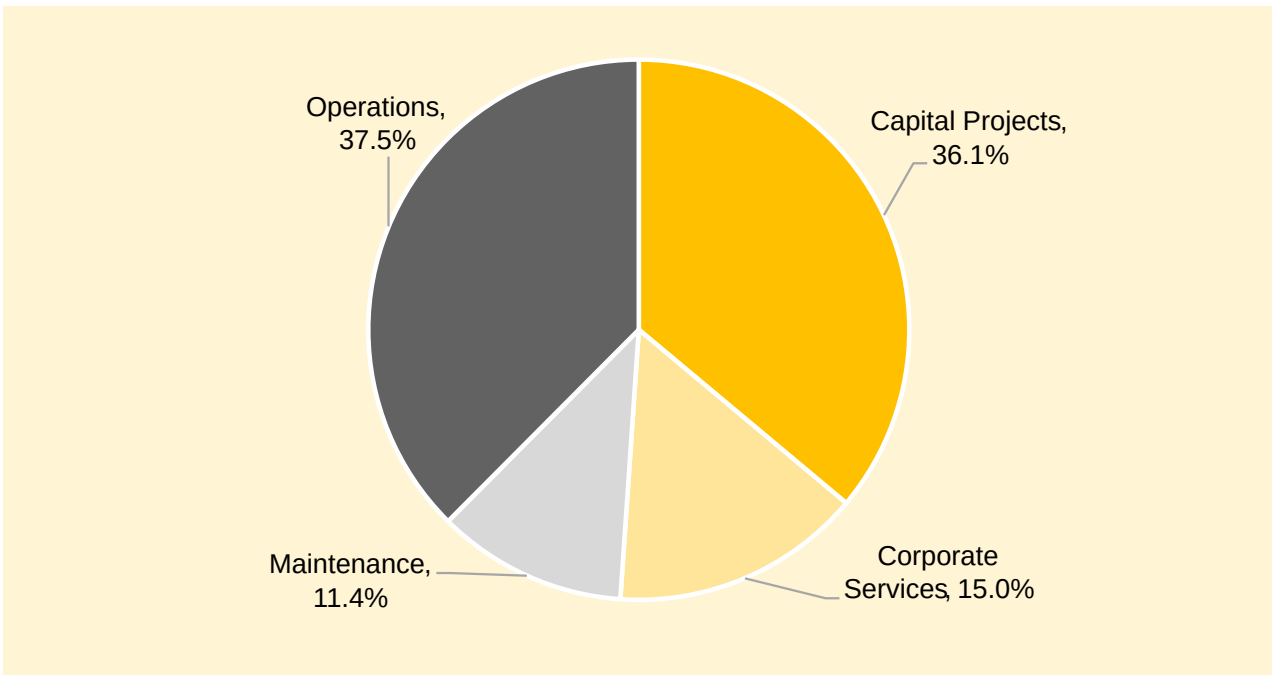


Figure 28 Work type split in UK rail in 2024

Figure 29 demonstrates how those work type proportions have changed since 2016. The largest fluctuation, and not surprisingly given the funding variability, can be seen in Capital Projects. The proportion of Operations roles, for both Train and Infrastructure, can be seen to be slowly increasing from an initial 28% in 2016 to a current 37.5% in 2024. By contrast, the proportion of roles under Maintenance activities has decreased from 17% in 2016 to 11.4% in 2024.

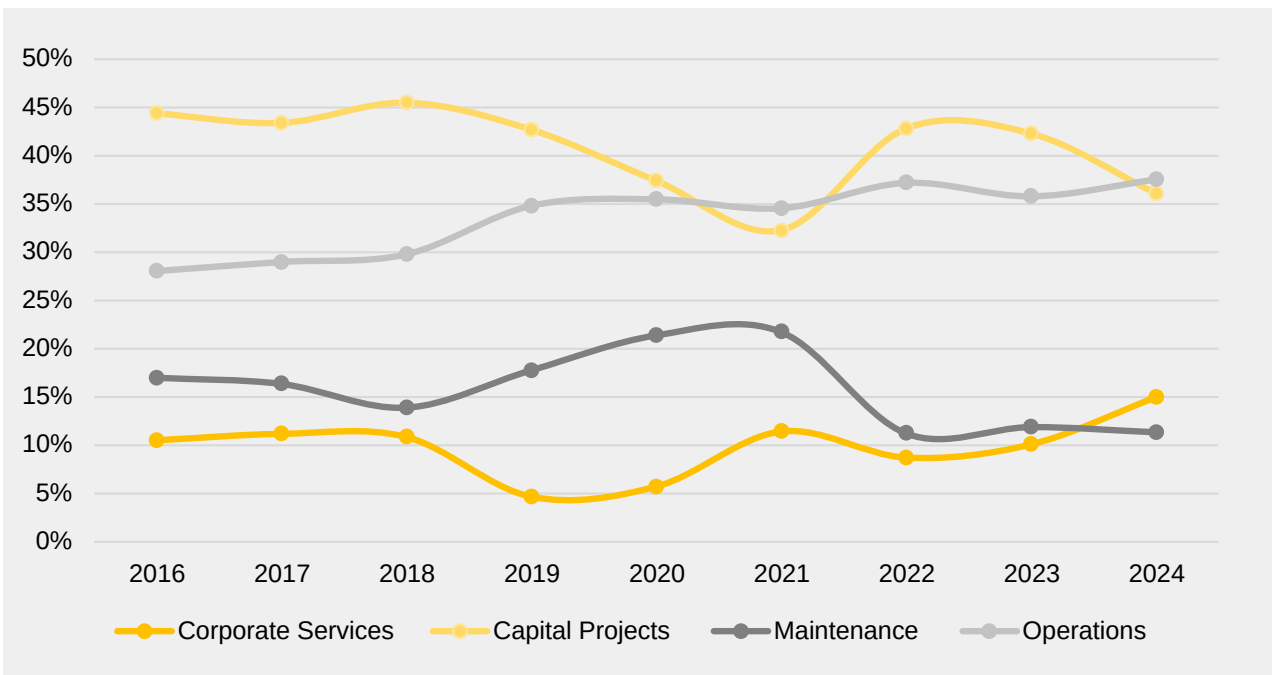


Figure 29 Work type split in UK rail since 2016

The gender proportion of each work type can be seen in Figure 30. It shows that nearly 4 in 10 of Corporate Services roles are undertaken by women, whereas less than 1 in 20 Maintenance roles are undertaken by women.

Work Type	Women	Men	Grand Total	Proportion of women
Corporate Services	12,842	20,217	33,059	38.8%
Capital Projects	5,980	73,612	79,592	7.5%
Maintenance	1,209	23,850	25,059	4.8%
Operations	18,297	64,494	82,791	22.1%
Grand Total	38,327	182,174	220,501	17.4%

Figure 30 Gender proportion of UK rail workforce by work type

The split of roles across the sector across asset types is demonstrated in the Figure 31. As can be seen, the largest proportion is in the Operations asset type, followed by Business Management, Track, Civils & Structures and the others at lower than 5%.

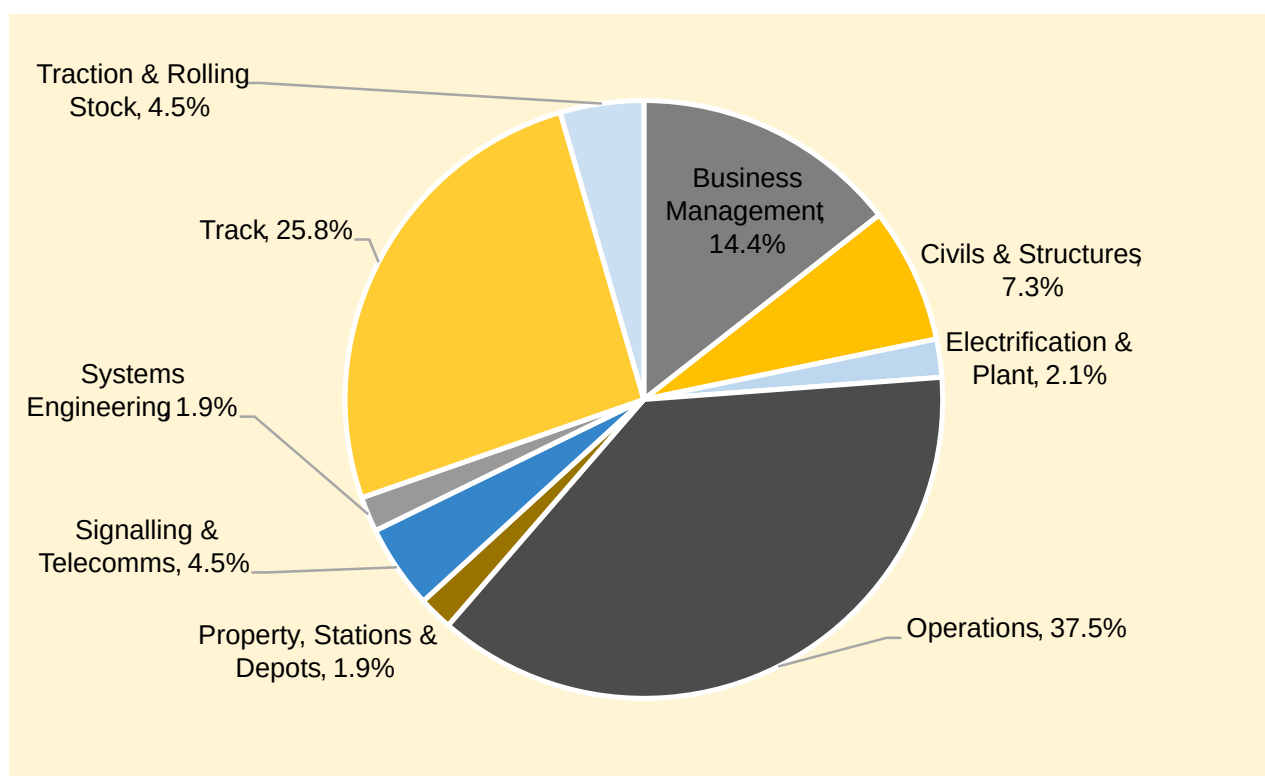


Figure 31 Asset type split in UK rail in 2024

The gender proportion of each asset type can be seen in Figure 32. It shows that nearly 4 in 10 of Business Management roles are undertaken by women, whereas around than 1 in 20 Track, Electrification and Traction & Rolling Stock roles are undertaken by women.

Asset Type	Men	Women
Business Management	60.8%	39.2%
Civils & Structures	94.0%	6.0%
Electrification & Plant	94.9%	5.1%
Operations	77.9%	22.1%
Property, Stations & Depots	79.9%	20.1%
Signalling & Telecomms	90.7%	9.3%
Systems Engineering	84.0%	16.0%
Track	94.6%	5.4%
Traction & Rolling Stock	94.2%	5.8%

Figure 32 Gender proportion of UK rail workforce by asset type



6.6 Skill level

One of the key aspects of NSAR’s annual workforce survey is to allocate each job role (not person per se) to a particular skill level. It is important to recognise that this is not linked to what qualifications an individual member of the workforce has, but what academic level is required to undertake each role. A Level 2 job role is equivalent to a GCSE skill level, a Level 3 role is equivalent to A levels, a Level 4 role equivalent to an HNC, a Level 5 role equivalent to an HND, a Level 6 role equivalent to a Bachelors degree and a Level 7 role equivalent to a Master’s degree qualification.

As can be seen in Figure 33, over half the roles in UK rail are at Skill Level 3 in 2024.

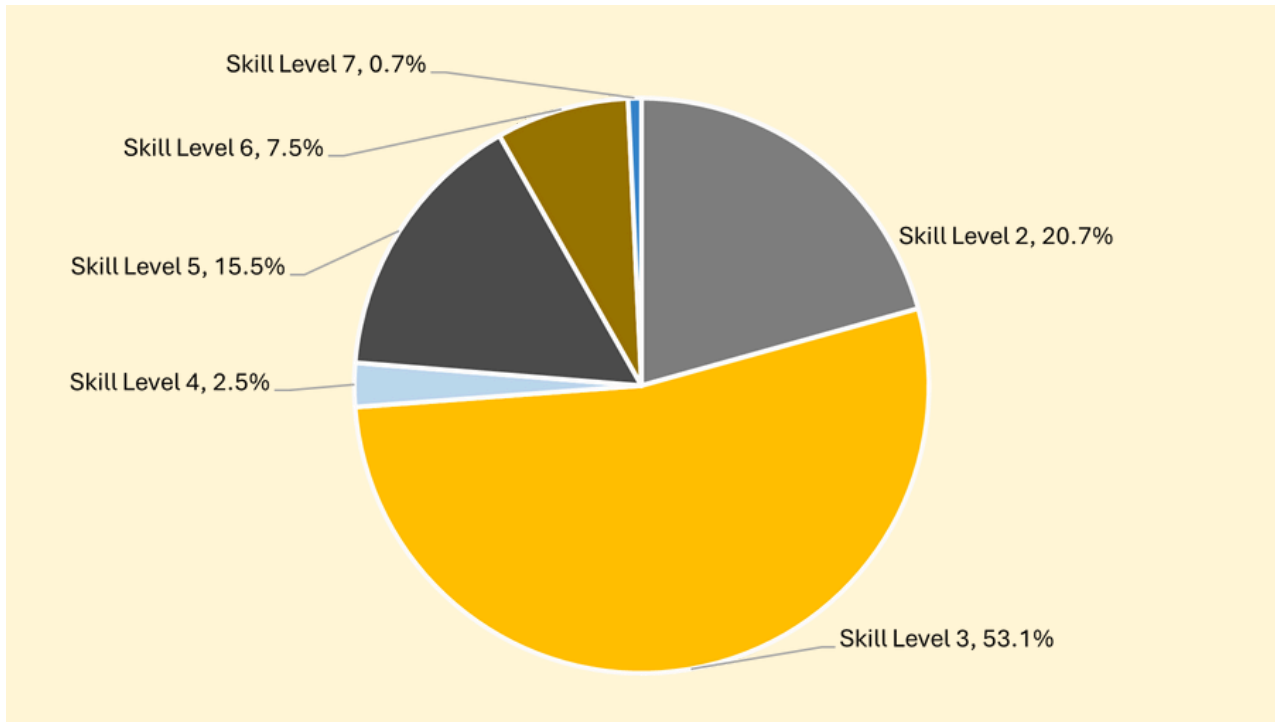


Figure 33 Skill level split in UK rail

Figure 34 demonstrates how those skill level proportions have changed since 2016. The largest fluctuation can be seen in Skill Level 3 and the largest fall since 2016 in Level 2 roles. This would indicate that the increasing levels of technology of the modern rail system demands higher skill levels amongst the workforce.

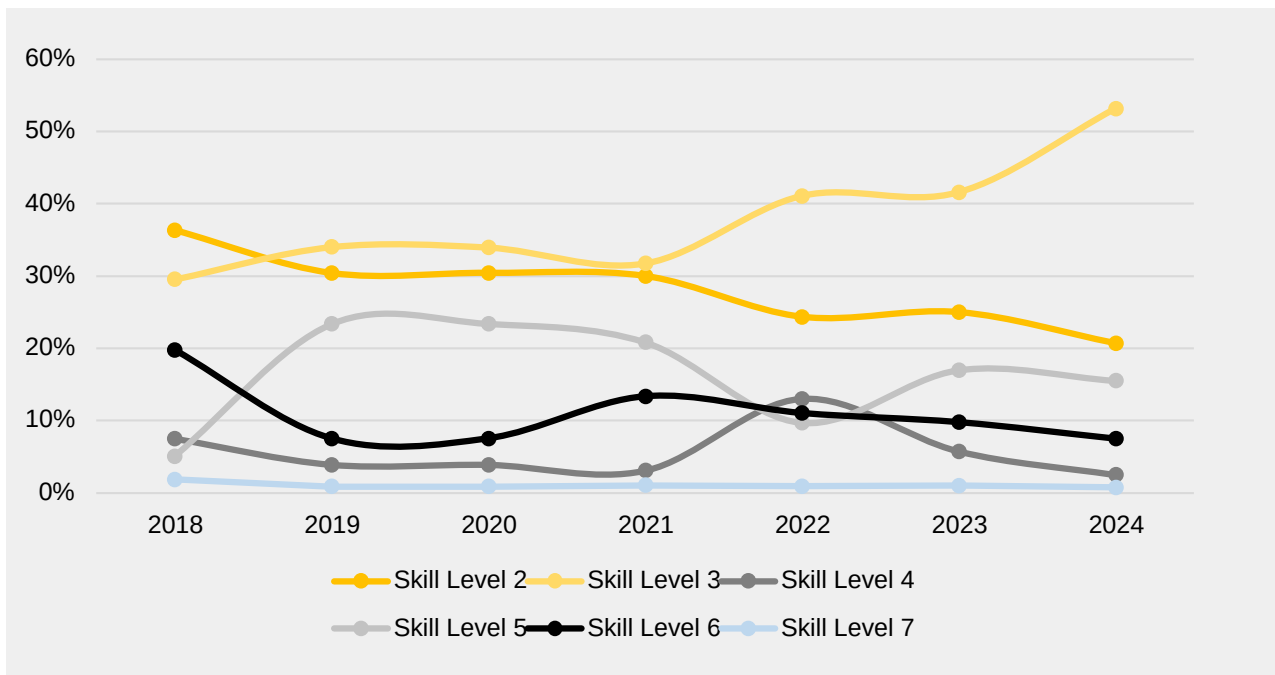


Figure 34 Skill level split in UK rail since 2018

6.7 UK regions

When requesting workforce data across the survey, NSAR also asks for the work location of each employee. We then allocate this work location into specific UK regions.

The split of the UK rail industry's job roles into UK regions can be seen in Figure 35. Just under a third of the roles in UK rail are deployed in London (31%), followed by the South East (14.1%), North West (11.4%), Yorkshire & the Humber (8.1%), West Midlands and Scotland (6.6%), East of England (6%), East Midlands (5%), South West (4.8%), Wales (3.5%) and the North East (1.8%).

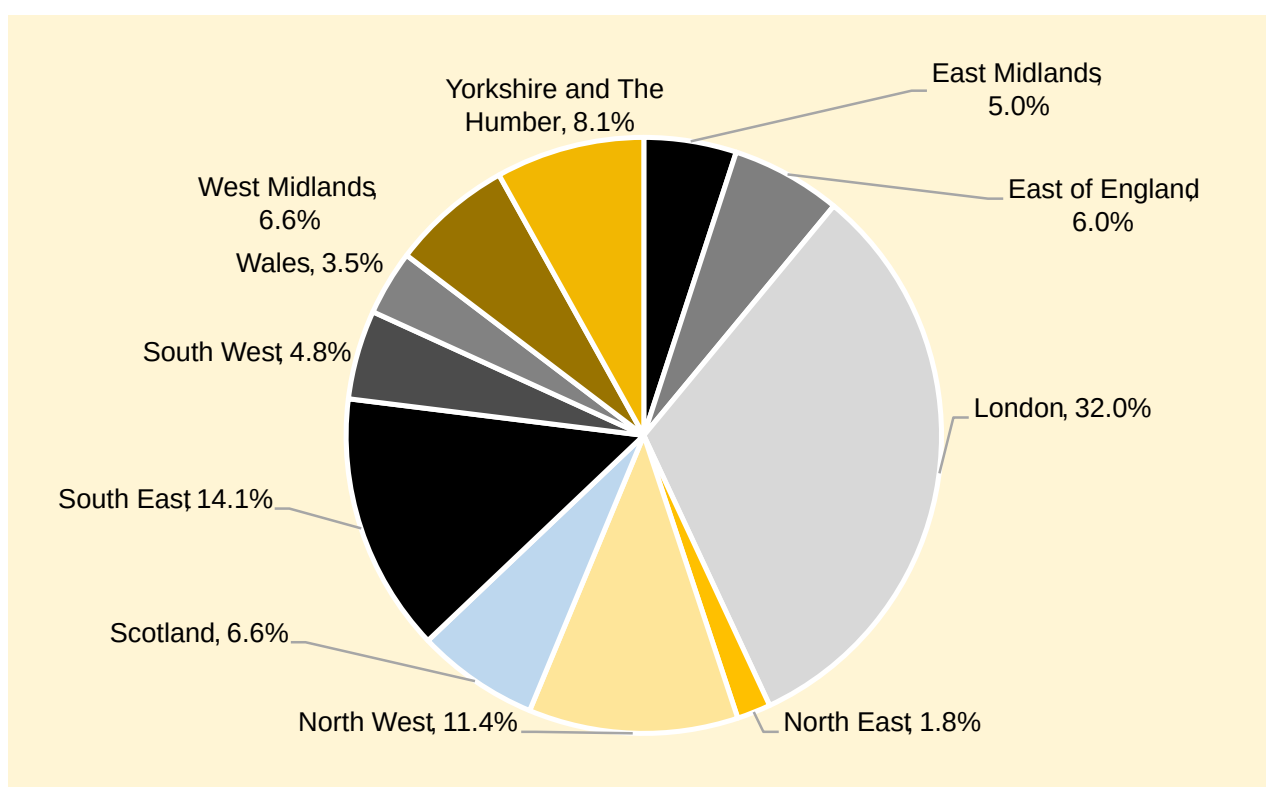


Figure 35 Proportion of UK rail workforce by Region in 2024

6.8 Organisation group

When requesting workforce data across the survey, NSAR also asks for the specific employer of each employee. We then allocate each employer to a specific organisation group.

As can be seen in Figure 36 below, over 90% of the rail workforce work for either a Train Operator, an Infrastructure client (and maintainer) or an Infrastructure Contractor. The remainder of the sector work for organisations such as Consultants, Freight Operators, Training Providers, Rolling Stock leasing companies or membership companies.

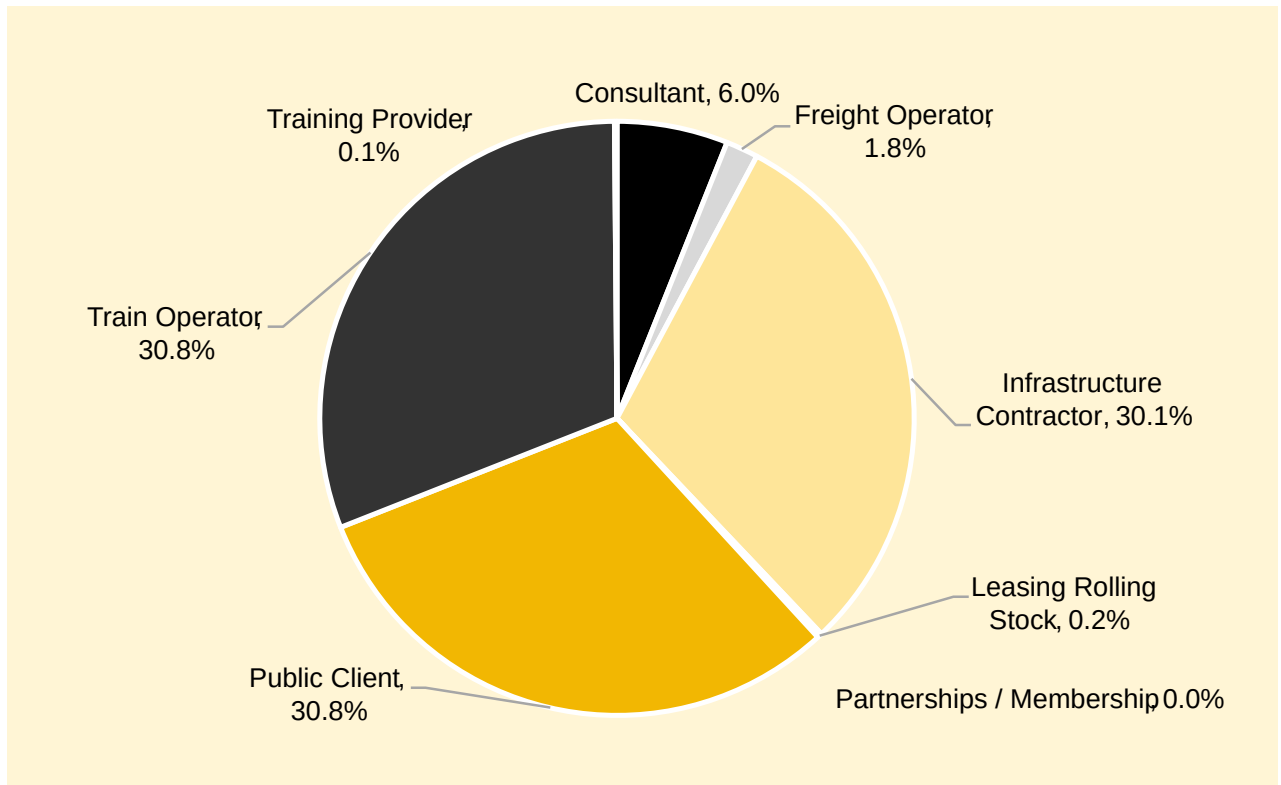
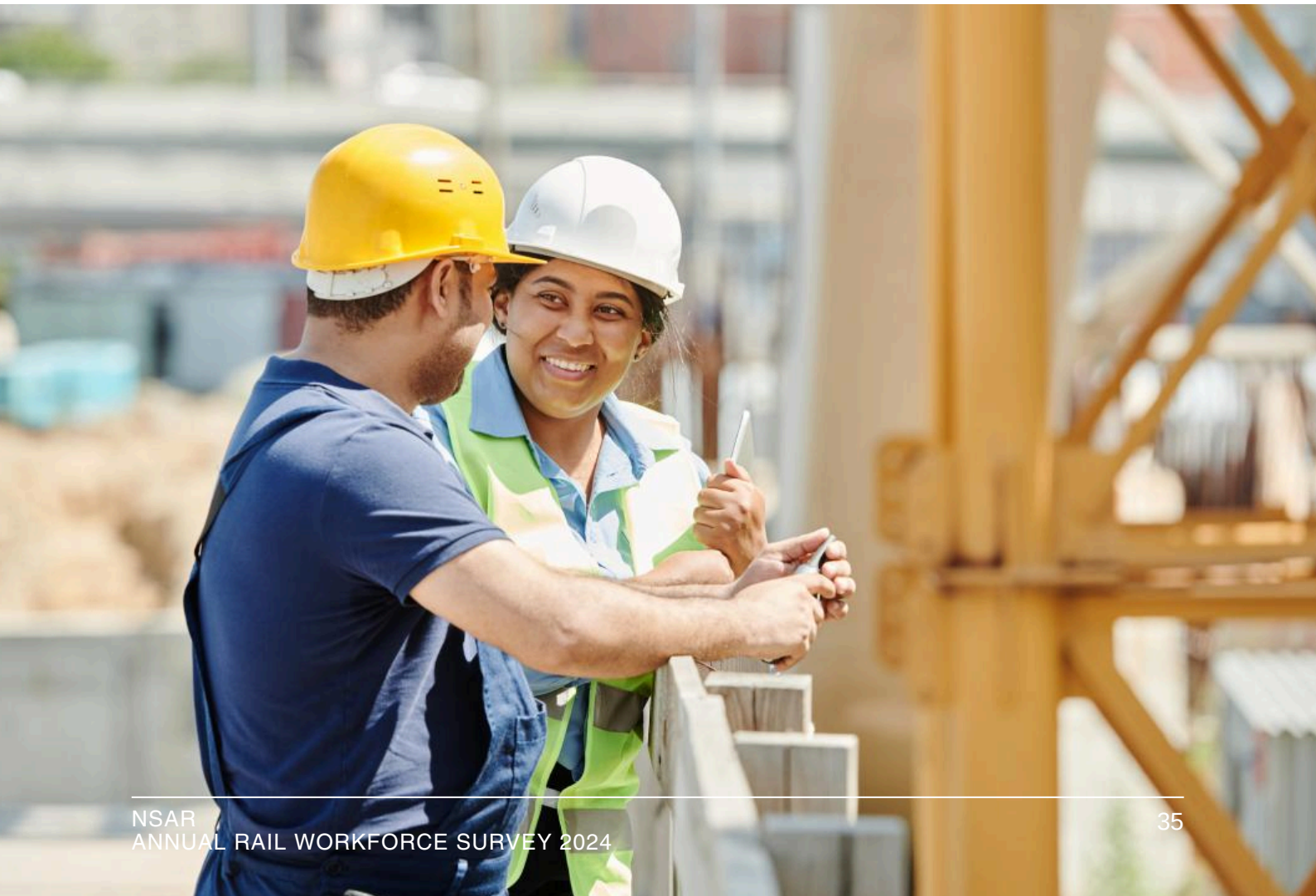
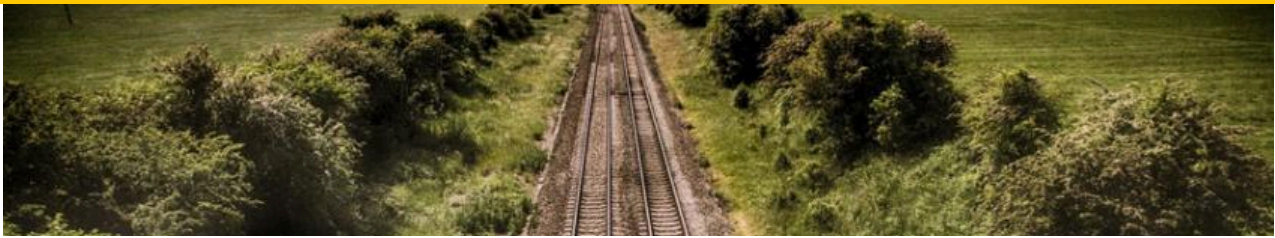


Figure 36 Proportion of UK Rail workforce by Organisation Group in 2024





7.0 Scenarios

In this section, we look at several factors that will affect the number of workers the rail sector is going to need by 2030, both in terms of demand and supply factors. These factors or scenarios include attrition and retirement levels, the impact of AI and automation, differential public investment levels, the impact of net zero initiatives and the impact of competition for talent and resource from other sectors.

NSAR has built a simulation model, code named WASP (Workforce Analytics Scenario Planner), that provides a number of different ranges for each scenario and what job roles they will apply to. This section looks at the results of that simulation against each of the scenarios and what the impacts on the workforce may be.

7.1 Attrition and retirement

As part of our data collection processes, NSAR has, for the first time, collected information on attrition levels in UK rail employers. The average UK employer attrition rate across the entire UK economy is around 15% in 2024. From data collected on 34% of the UK rail workforce through their employers (a representative sample size), the annual average attrition rate is 8.4% across the sector. This represents one in 12 of the workforce leaving their current employer every year, for reasons that include retirement, ill health, new role (in rail or another sector), redundancy, dismissal or even death. If we extrapolate that figure across the sector, the number of people leaving their current employer (and so will need replacing) will be nearly 90,000 by 2030.

A large proportion of the attrition figure in the UK rail sector is retirement. In general terms, the average retirement rate in UK rail is around 62 years old, but we have deployed three other scenarios to provide comparative numbers of people who will need to be replaced by 2030.

At one end of the range, taking an average retirement age of 60 across the sector, the UK rail workforce will lose just over 57,300 people by 2030. By contrast, using the current state retirement age of 67, that figures reduces to just under 22,300 workers. By taking the current sector retirement age of 62, we will lose 47,000 by 2030. Figure 38 below applies.

Whatever scenario is chosen, the simple fact remains that the UK rail sector will need to replace a large proportion of the workforce over the next years, ranging from 22,300 to nearly 90,000, if all attrition and retirement scenarios are at their highest levels.

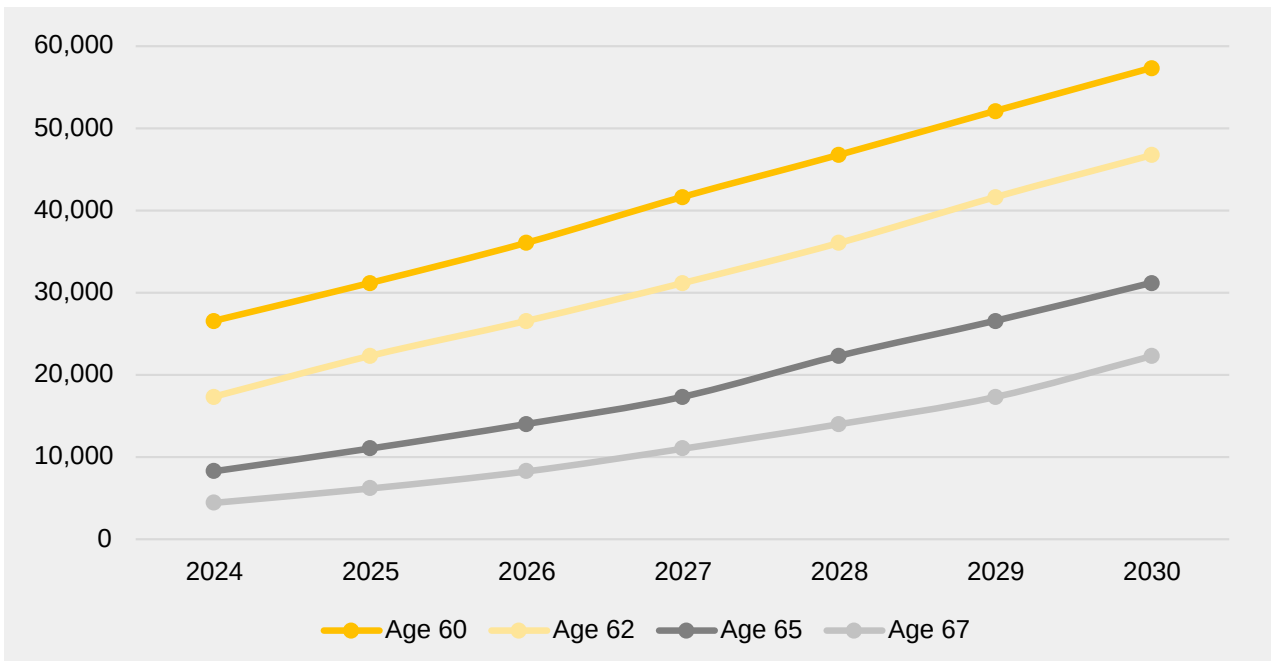


Figure 37 Number of potential retirees from UK rail in 4 scenarios to 2030

Year	Retirement age			
	Age 60	Age 62	Age 65	Age 67
2024	26,549	17,327	8,281	4,459
2025	31,158	22,296	11,042	6,207
2026	36,037	26,549	14,021	8,281
2027	41,622	31,158	17,327	11,042
2028	46,732	36,037	22,296	14,021
2029	52,072	41,622	26,549	17,327
2030	57,303	46,732	31,158	22,296

Figure 38 Table showing numbers of potential retirees for each scenario

7.2 The impact of AI and automation

As new technologies are adopted into the UK rail sector, the potential for change to the way rail operates is significant, with a forecasted reduction of around 7.5% across the entire industry workforce. Particular roles or areas of work likely to feel this impact include customer service and adjacent roles (a reduction of 20%, around 6,300 roles lost), maintenance-related roles (reduction of 10%, around 2,000 roles) and engineers (reduction of around 7.5%, 800 roles) by 2030.

7.3 Variations in public investment levels

Heightened public investment into the sector is projected to increase the workforce by 2.5%, including increases of around 200 project-related roles, 250 engineers, 350 roles relating to the operation of the railway and around 1,500 technicians, among other increases.

7.4 The impact of net zero initiatives

The impact of net zero initiatives suggests that a marginal increase of around 1.5% in the workforce could be required. This includes increases of around 2.5% for roles such as technicians (around 1,500), drivers (around 600) and customer service-related roles (around 800).

7.5 The impact of other sector competition for talent

Increased competition for labour from other sectors could have an impact on the rail sector, causing a loss of around 7.2% of current sector employees by 2030, about 16,000 workers. This includes an estimated 20% of engineers (around 2,000), 25% of project managers (around 1,200) and 35% of software engineers (around 200).



8.0 The available supply of labour

In this section, we look at a number of different pathways into the rail sector. NSAR has built a simulation model, the Labour Supply Model, that looks at the education data at GCSE, A-Level and University level in order to understand the trends in specific subjects relevant to the UK rail sector.

For the purposes of this report, we have selected mainly STEM subjects but recognise that students and graduates can come with different academic qualifications and subject areas. This section looks at the results of that simulation against each of those three entry points and whether the trend is positive in terms of the number of students studying highly relevant subjects.

8.1 GCSE STEM subjects

When considering the number of students studying specific STEM subjects at GCSE level, we can see a clear gradual positive trend in numbers from 2018 to 2024, with the exception of Mathematics, which has a slight dip in 2022. Figure 39 applies.

The slight flatline around 2020 is likely explained by the COVID pandemic. The pandemic caused significant disruptions in education, with many schools shifting to remote learning or closing temporarily, which likely impacted the number of students entering GCSEs. Since then, the numbers have recovered and continue to grow.

Science numbers are on the left axis and Mathematics numbers are on the right axis.

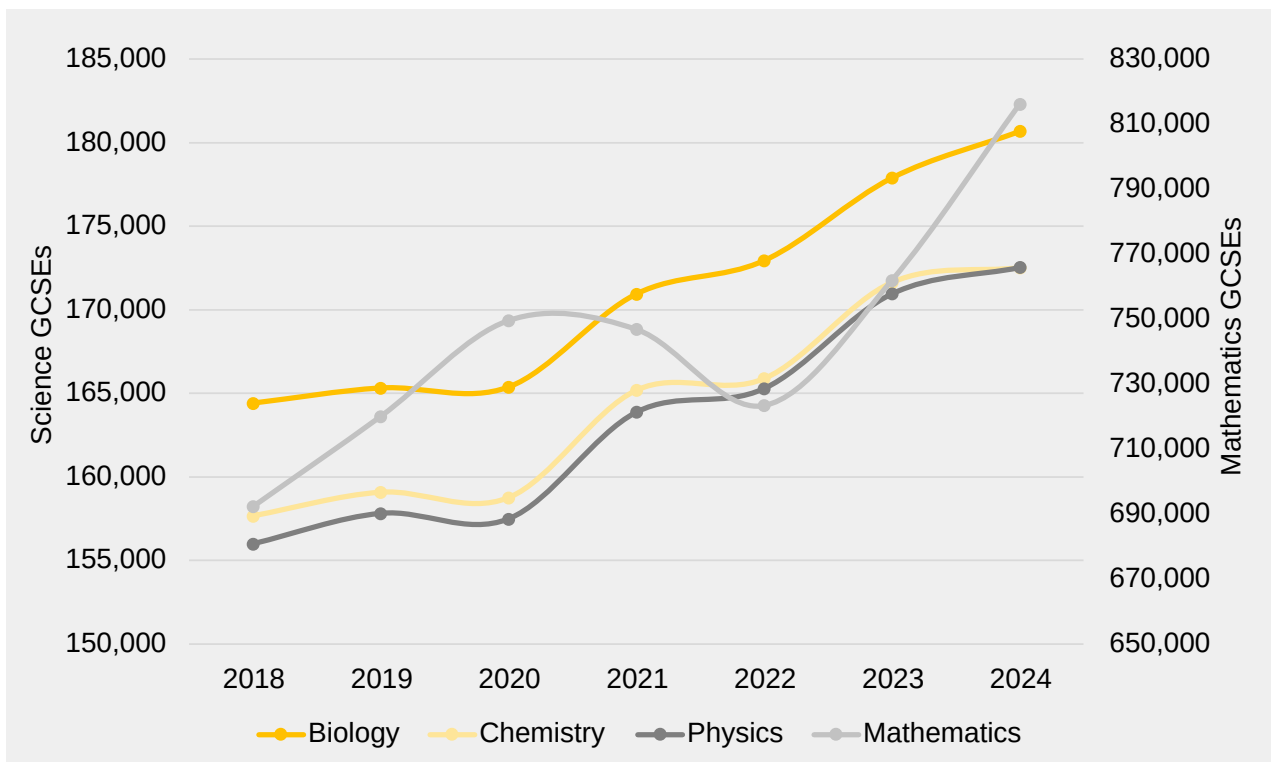


Figure 39 GCSE STEM Subjects 2018 to 2024

8.2 A-Level STEM subjects

Similarly to the GCSE level, the trend of student numbers in Mathematics is a bit more sporadic than the Science subjects, although it has shown a sharp rise to around 107,000 in 2024.

All three science subjects show a steady increase year on year with a slight trough in 2020, once again due to the covid pandemic.

It can also be noted that the changes were not hugely drastic as the base population of people taking A-Levels is far lower than GCSEs and these numbers are also affected by students choosing alternate paths such as BTECs or apprenticeships in comparison to the compulsory GCSEs. Figure 40 applies.

Science numbers are on the left axis and Mathematics numbers are on the right axis.

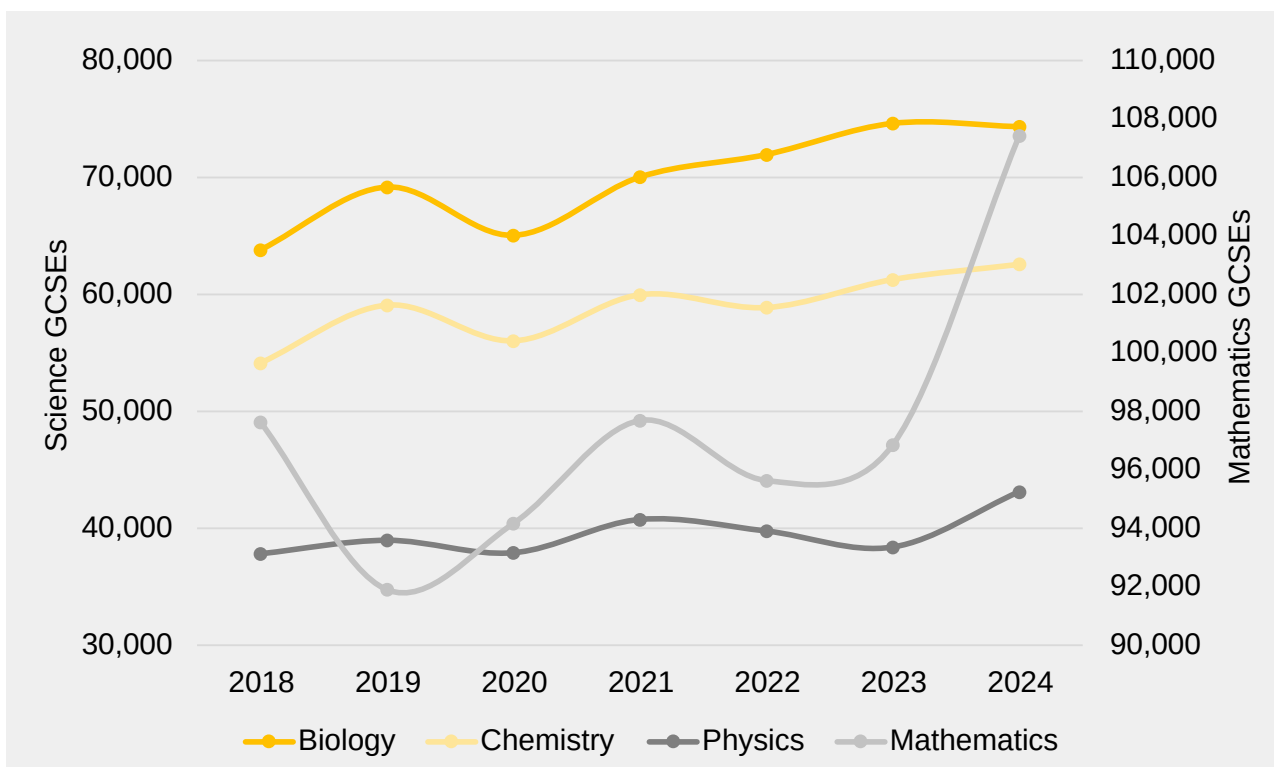


Figure 40 A-Level STEM Subjects 2018 to 2024



8.3 University STEM subjects

Data for university STEM subjects is somewhat more limited than GCSEs and A-Level data as 2024 results have not been published yet. Both computing and engineering show a positive upwards trend of entrants, whereas the science subjects peak in 2021 and show a slight downwards trend. However, this decrease is very minimal accounting for around one to three thousand from 2021 to 2023, so the overall numbers remain relatively consistent across the five-year time span. Figure 41 applies.

Science numbers are on the left axis and Engineering and Computing numbers are on the right hand axis.

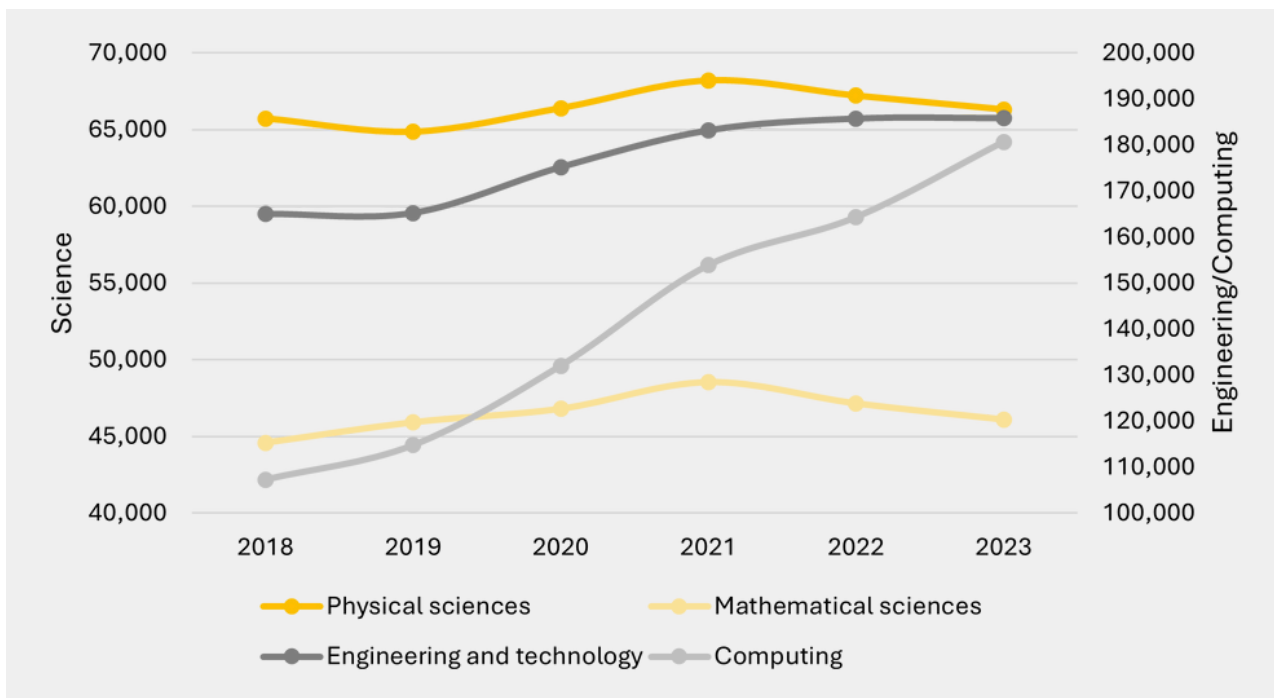


Figure 41 Uni STEM Subjects 2018 to 2023

NSAR support

NSAR is not-for-profit membership organisation and expert skills and workforce consultancy. We are trusted by government, industry and training providers to deliver services and projects within rail and other sectors.

Our services

Workforce Planning

Using our data analysis and forecasting we help organisations and sectors better understand their current workforce and determine their needs and investment requirements for the future.

Apprenticeship Agency

The NSAR Apprenticeship Agency helps businesses across the rail industry by providing and supporting their apprentices. We work with businesses to identify which apprenticeships best suit their needs and then recruit and employ the apprentice on their behalf, matching the apprentice with a training provider. NSAR also provides HR support to the apprentice while they are hosted.

Apprenticeship Services

Our Apprenticeship Services support organisations with apprenticeship programme development, assessment planning, levy optimisation and finding training providers. We also work with government, suppliers and employers to develop and reform apprenticeship standards and National Occupation Standards (NOS) in rail.

Quality Assurance

Our expert Quality Assurance team assess the quality of compliance, delivery and premises for regulatory training across the UK.

Competency Management

NSAR offers a Competency Management System (CMS) platform called Skills ID to help organisations access and track their overall and individual staff skill set, training requirements, progress and authority to work.



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