

FIDIC-EFCA 2003 Annual Survey

Association data

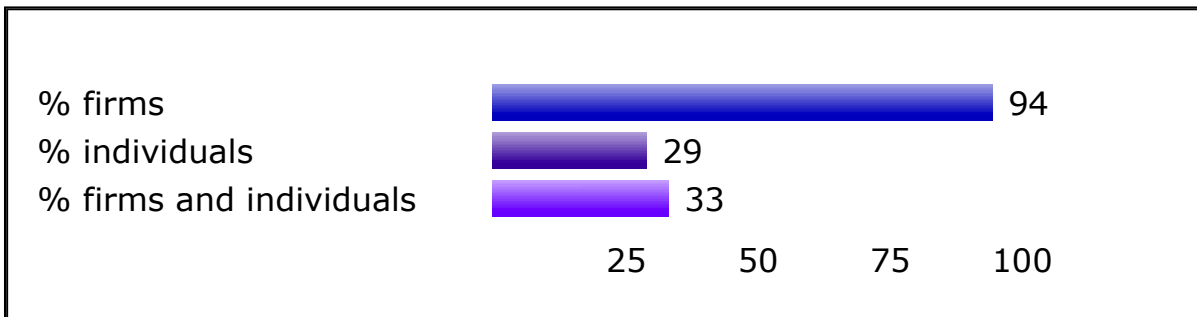
1. Association membership

Associations have membership categories based on firms, individuals and firms and individuals. The figure shows the percentage of associations with each category of membership. Under the FIDIC Statutes, firms and individuals derive a substantial portion of their income from the provision of impartial consulting services to a client for a fee. Firms have at least one staff member, are properly constituted as a business enterprises that operate as financially independent entities, free from subsidies or preferences.

Individual membership is for employees that are members in their own right, independent of the firm for which they work. Coupled firm and individual membership categories arise when, for example, each member firm must register at least one staff member as an individual member.

It can be seen that, on average, 83% of associations have a firm membership category, 18% have an individual membership category, and 22% have a membership category based on both.

Average number of respondents: 15.
(FIDIC associations: non-umbrella and umbrella).

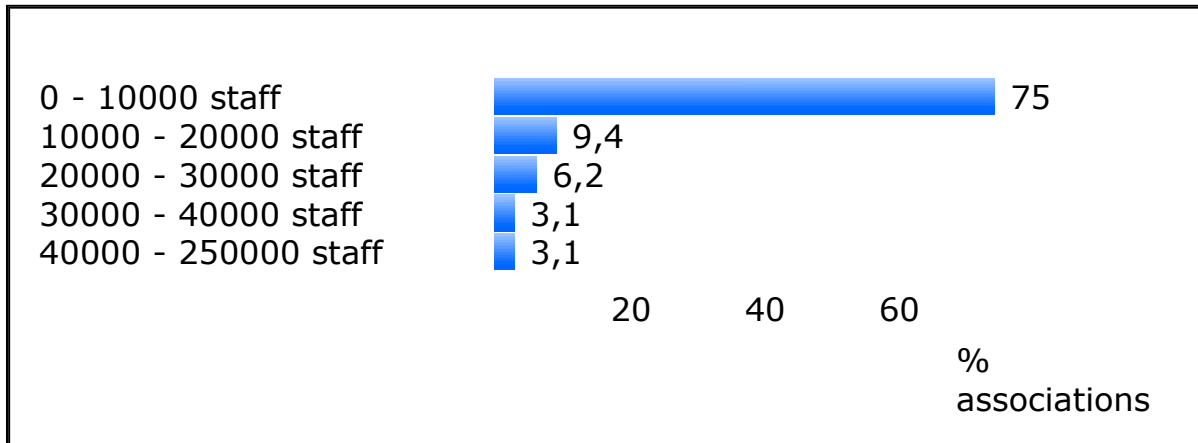


2. Member firms: reported staff number distribution

The figure shows that 79% of associations report a firm staff number that is less than 20000. One association (ACEC-USA), representing 3% of respondents, has more than 60000 staff.

The reported staff number is used to calculate FIDIC annual subscription fees. If the number is not updated prior to the FIDIC annual General Assembly Meeting that votes the FIDIC annual budget, then the number is automatically increased by 10% each year.

Average number of respondents: 32.
(FIDIC associations: non-umbrella and umbrella).

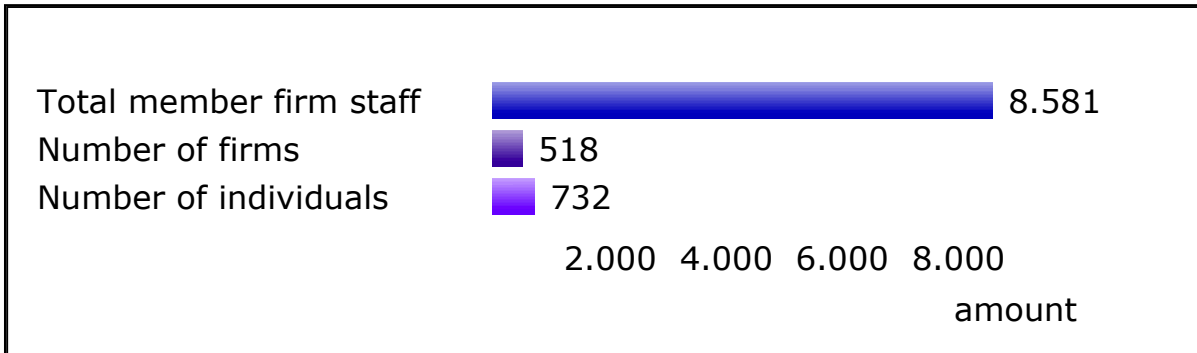


3. Membership categories: association averages

The figure shows the average for an association of: the total number of staff working for member firms; the number of firms for the category of membership based on firms; the number of individuals for the category of membership based on individuals.

It can be seen that a FIDIC Member Association on average has some 8900 staff working for some 520 member firms, noting that 17% of associations do not have firms as members. Associations on average have some 750 individuals as members, noting that some 82% of associations do not have individuals as members.

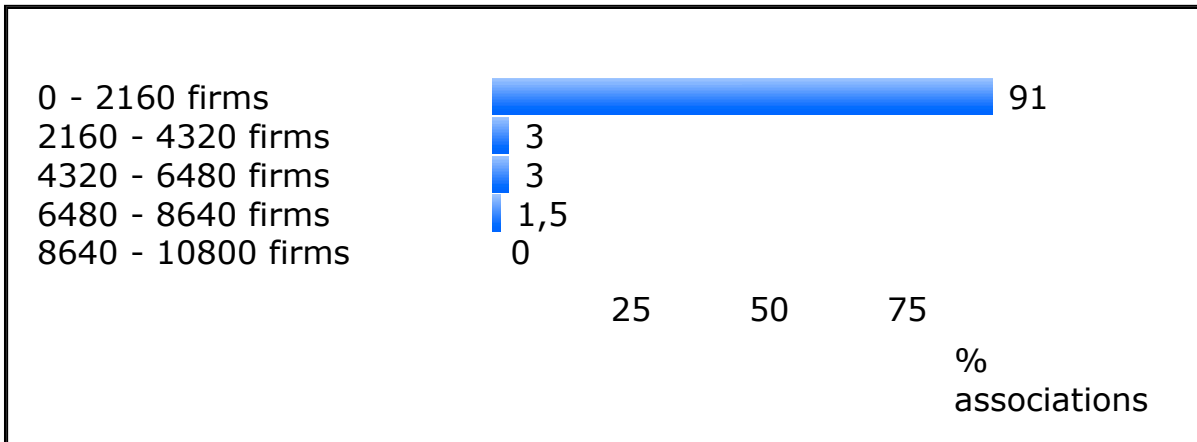
Average number of respondents: 43.
(FIDIC associations: non-umbrella and umbrella).



4. Number of member firms: distribution

The figure shows the distribution of the number of member firms for FIDIC Member Associations. It can be seen that some 80% of associations have up to some 1400 member firms, with some 8% having between some 1400 and 2800 firms. One association (ACEC-USA), representing 1.6% of respondents, has more than some 5550 member firms.

Average number of respondents: 66.
(FIDIC associations: non-umbrella and umbrella).

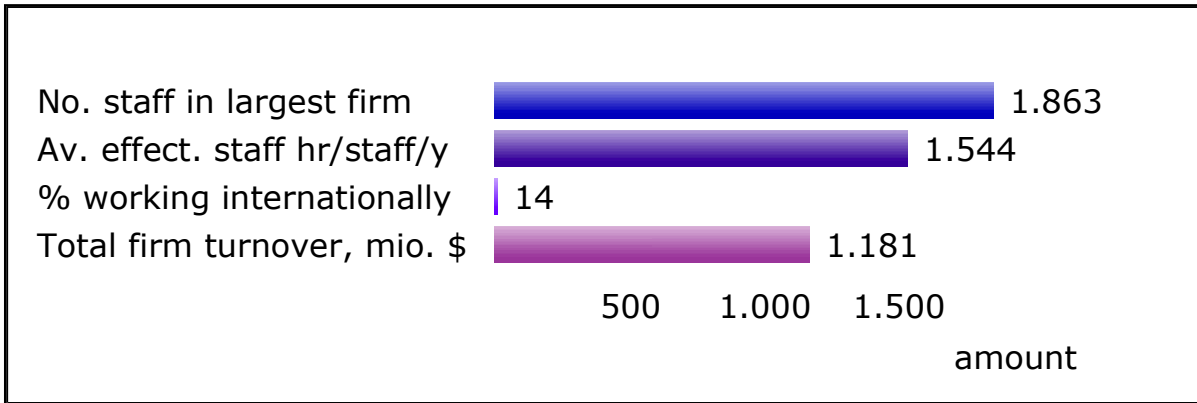


5. Member firms: association averages

The figure shows the average for associations of: the staff number in the largest firm; the effective staff hours worked each year per firm staff member; the percentage of firms for which a significant percentage (at least 5%) of domestic turnover involves international work; the total member firm turnover.

The average association represents firms with a total annual turnover of some USD 1300 million, the largest of which employs some 1800 staff who work some 1520 hours each year, with 14% of domestic turnover carried out internationally.

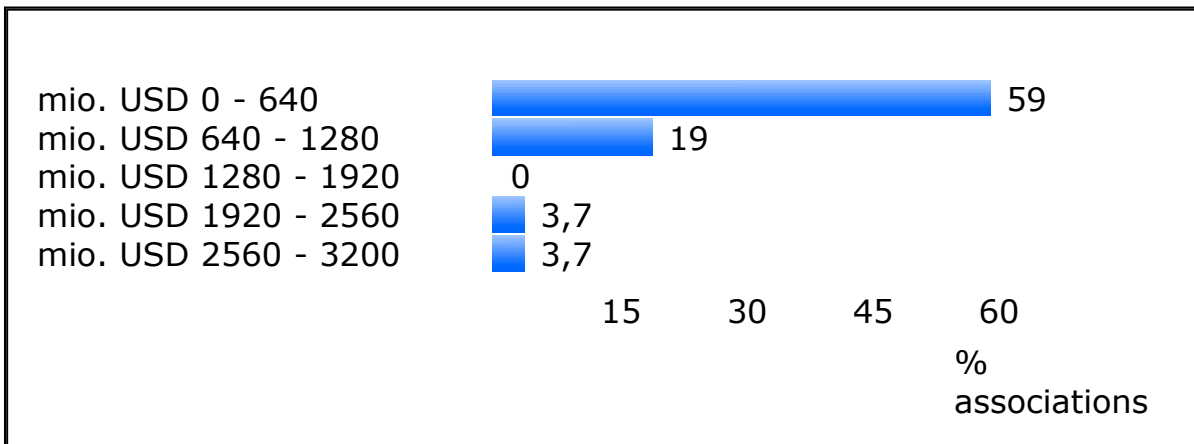
Average number of respondents: 18.
(FIDIC associations: non-umbrella and umbrella).



6. Member firms: turnover distribution

The distribution of total member firm turnover for associations shows that 74% of associations represent firms with a total turnover of up to USD 1300 million.

Average number of respondents: 27.
(FIDIC associations: non-umbrella and umbrella).

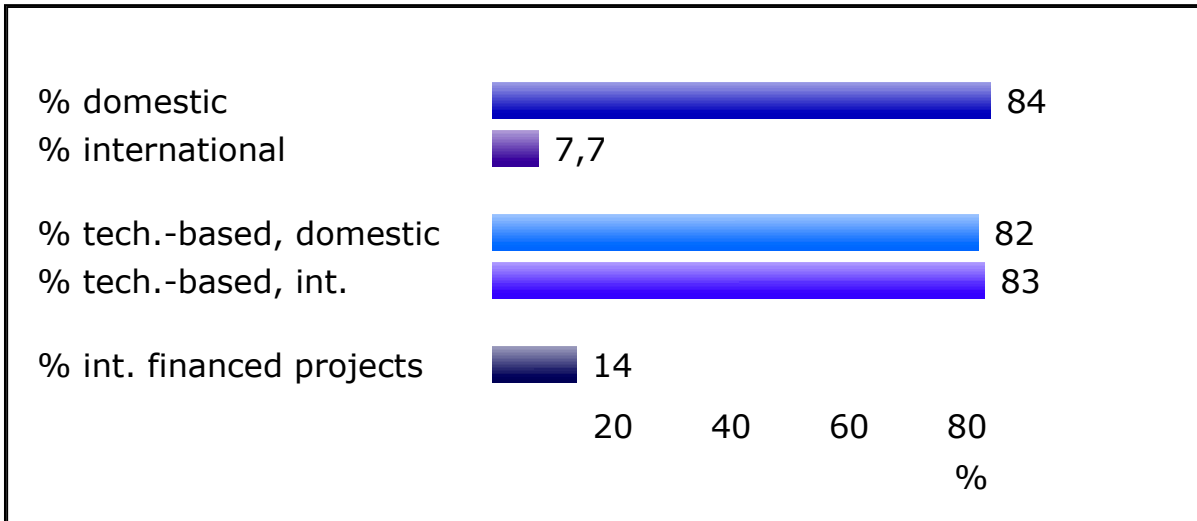


7. Member firms: turnover type

Associations report that on average some 84% of member firm turnover comes from domestic as opposed to international activity. The percentage of turnover for both activities that comes from supplying technology-based intellectual services is some 80%. Some 14% of domestic turnover is financed internationally.

Activities are surveyed on the basis of either the percentage of firm turnover, or the effective hours worked, or the staff number for activities in each sector. However, owing to insufficient data, the three measures are assumed to be the same.

Average number of respondents: 17.
(FIDIC associations: non-umbrella and umbrella).

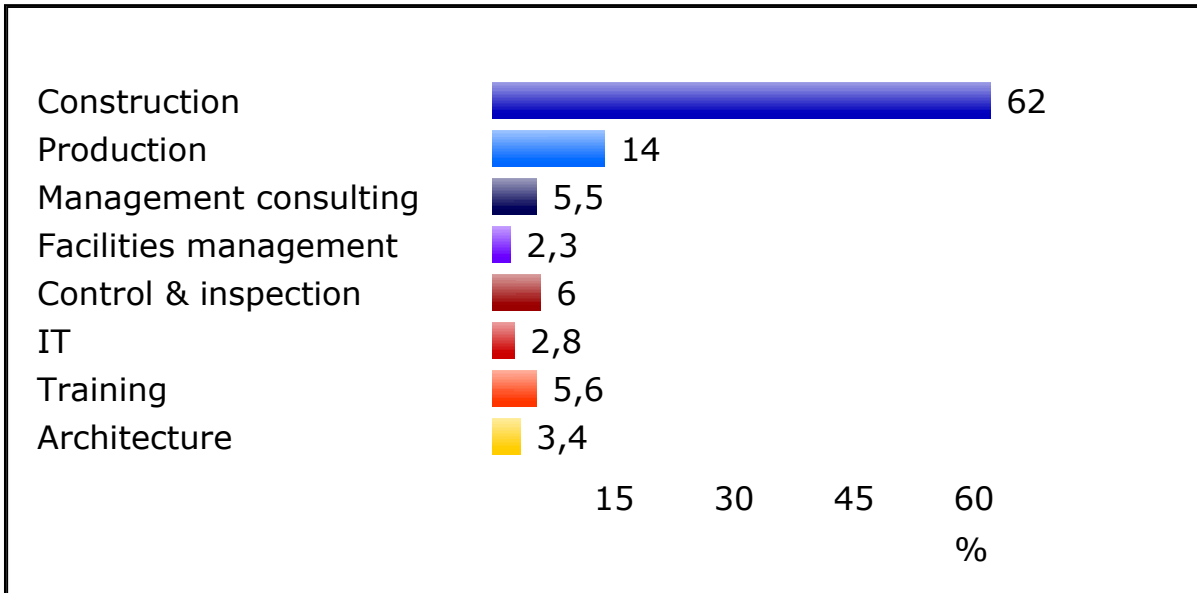


8. Member firms: activity by type

Associations report that on average some 64% of member firm activity comes from construction-related activity. Construction activities involve consulting, technical design, on-site services, and turnkey operations.

Other activities in decreasing order of importance are: durable goods production (consulting, design, development, production), training (consulting), management consulting (consulting), technical control and inspection (consulting, on-site services), architecture (consulting, technical design, on-site services, turnkey), facilities management (on-site services), and information technology (consulting, technical design, on-site services, turnkey).

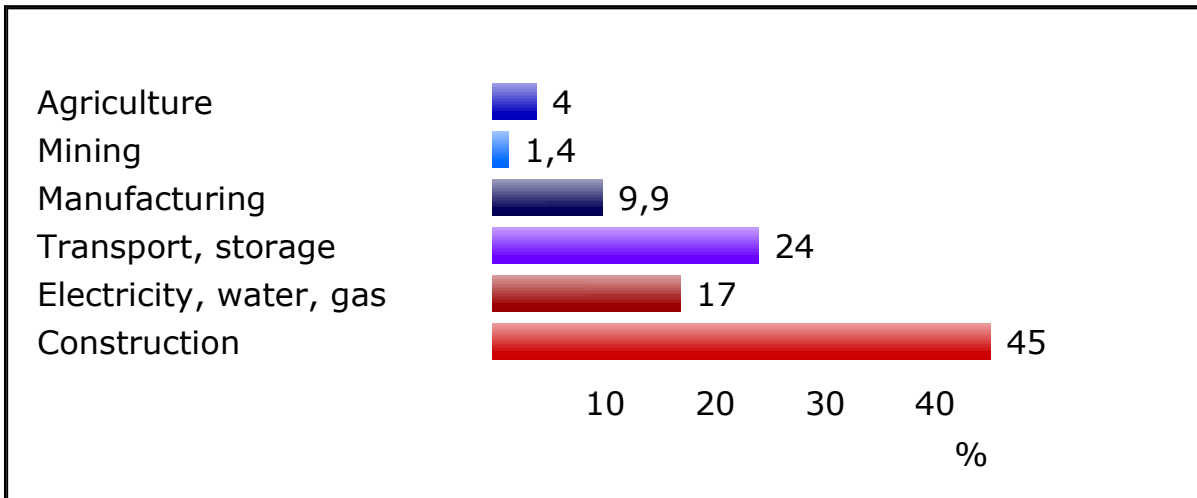
Average number of respondents: 24.
(FIDIC associations: non-umbrella and umbrella).



9. Member firms: activity by sector

Some 52% of member firm activity is for the construction sector.

Average number of respondents: 12.
(FIDIC associations: non-umbrella and umbrella).



10. Member firms: ownership type

Some 73% of member firms are owned by the management and partners, and 16% by private investors who are not active in the firm. The remainder are owned directly or indirectly by government.

Average number of respondents: 27.
(FIDIC associations: non-umbrella and umbrella).

