

**FIDIC
DIRECTORS AND GENERAL
SECRETARIES MEETING
THE HAGUE 1999**

**SURVEY ON
NATIONAL
ASSOCIATIONS
ACTIVITIES**

18 September 99

SYNTEC INGENIERIE

SURVEY ON A SAMPLE OF FIDIC MEMBER ASSOCIATIONS

- **EUROPE: 9 associations, 9 countries, 177 million inhabitants.**
- **AMERICA: 1 association, 1 country, 267 million inhabitants.**
- **AFRICA: 2 associations 2 countries, 58 million inhabitants.**
- **ASIA: 2 associations, 2 countries, 926 million inhabitants.**

**TOTAL: 14 associations of countries
representing 1,428 million inhabitants
out of 5,820 in the world**

MAIN ECONOMIC INDICATORS

	Countries	Population millions	G. F. C. F. US \$ bn
AFRICA	Uganda	20	1
	South Afri.	38	20
AMERICA	USA	267	1361
ASIA	India	846	91
	Vietnam	79	7
EUROPE	Part E. U. (Dk, Fr, Ir, Nl, S, Uk)	151	532
	Ch, H, CR	28	75

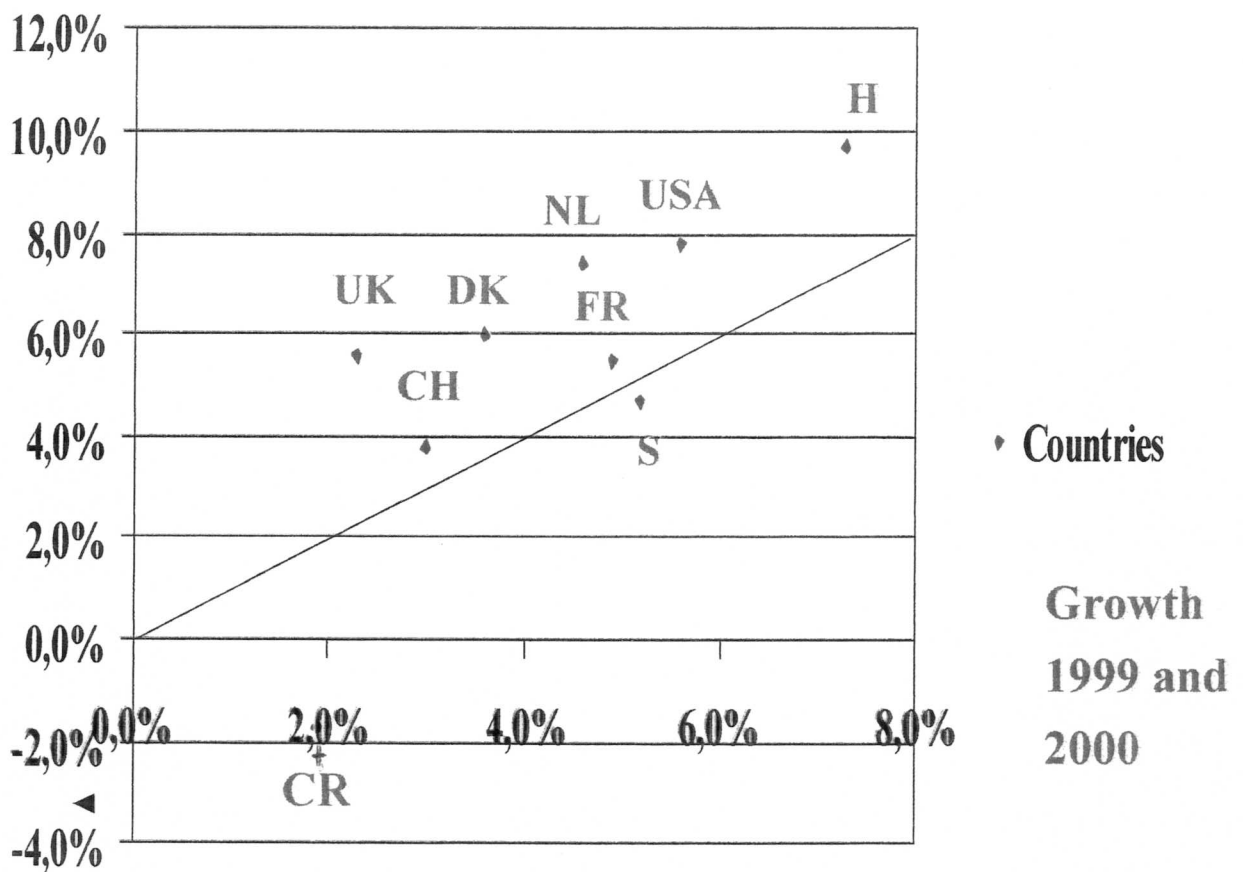
Total 2,087

out of US \$ 6,627 bn in the world

GROSS DOMESTIC PRODUCT GROWTH

(1998, average GDP per capita: US \$ 8,332)

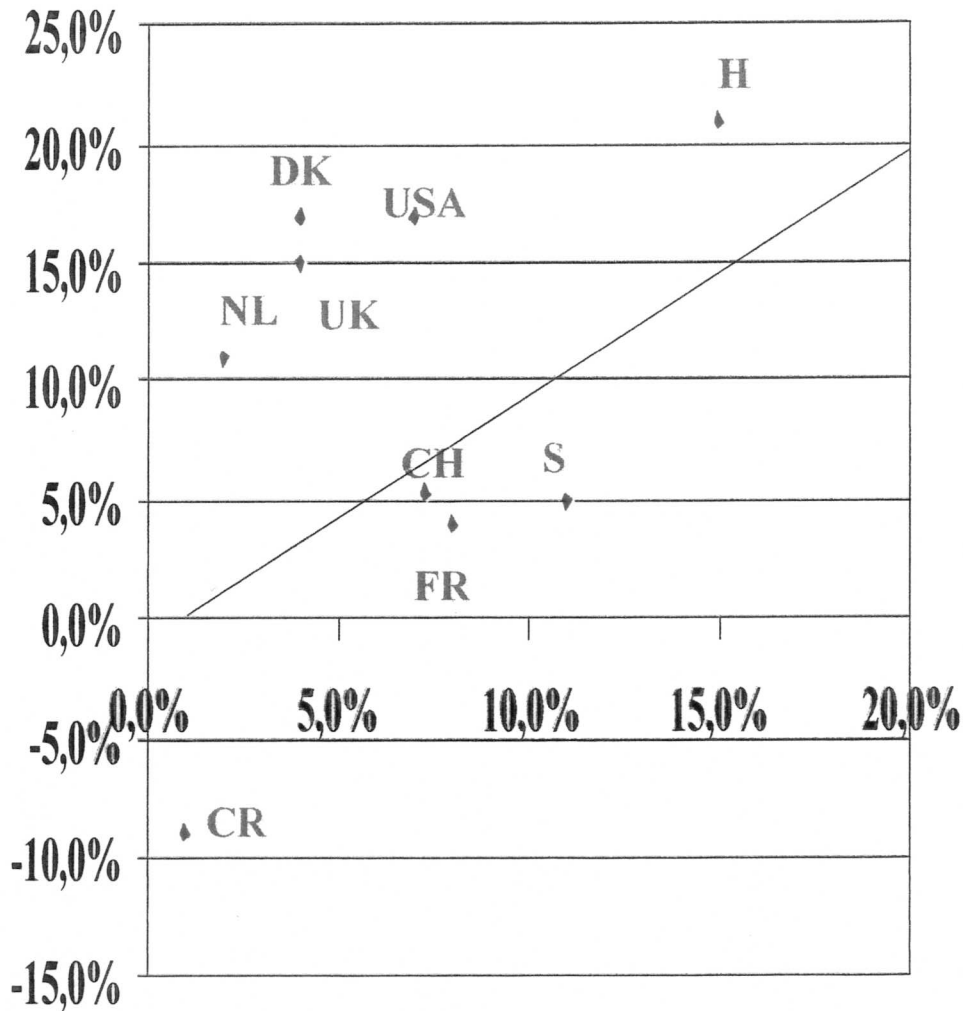
Growth
1997 and 98



GROSS FIXED CAPITAL FORMATION GROWTH

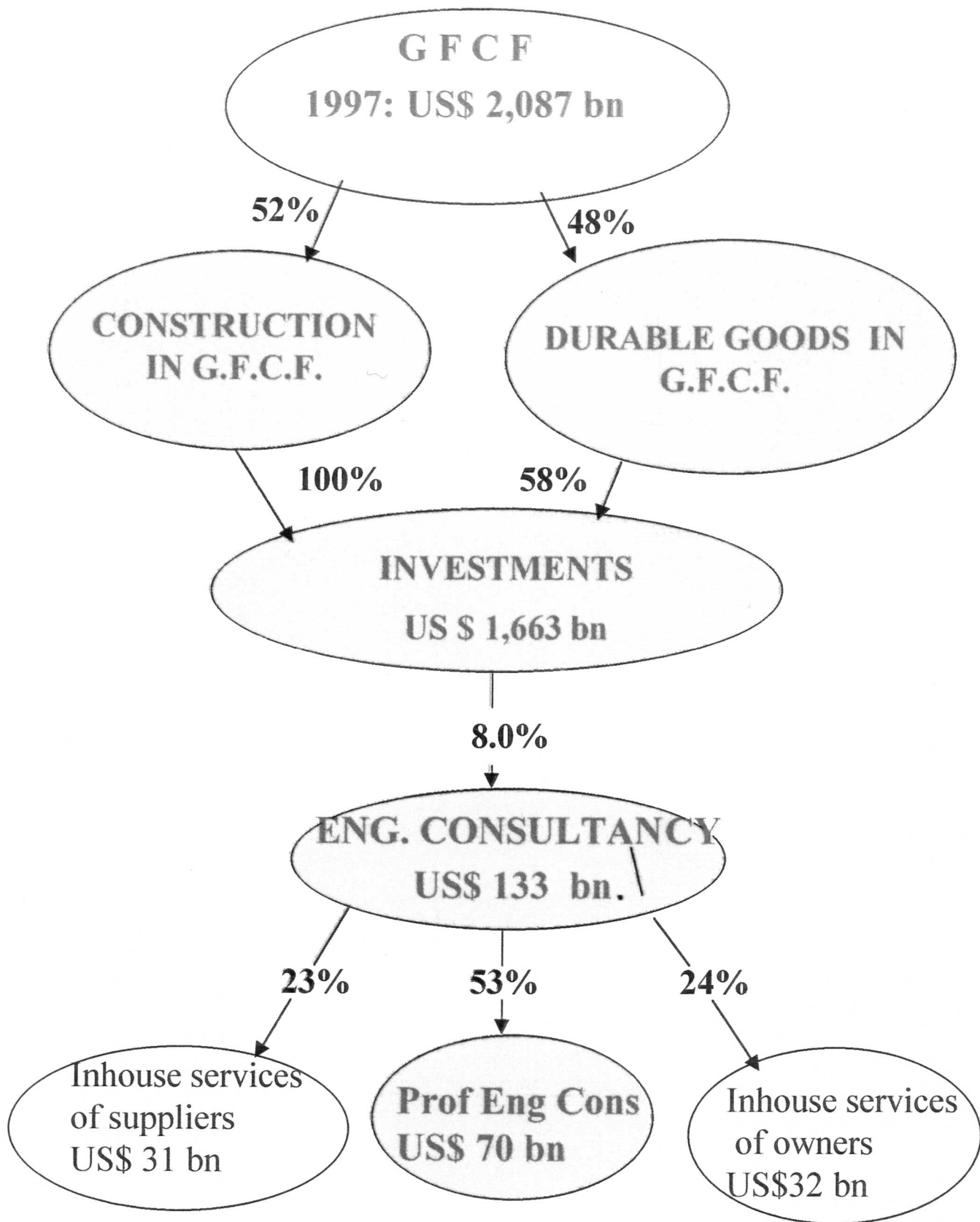
(1998, average GFCF per capita: US \$ 1,715)

Growth
1997 and 1998



◆ Countries

Growth
1999 and 2000

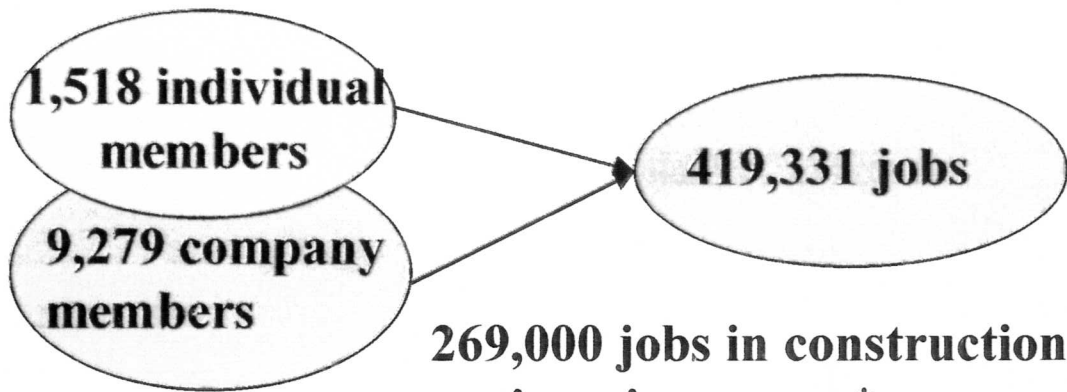


SYNTEC INGENIERIE

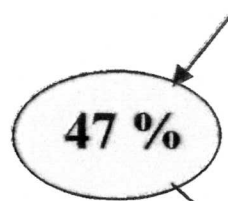
**PRACTICE OF
ENGINEERING CONSULTANCY
(in 14 countries)**

- Subject to legal restrictions
in 5 countries out of 8.
- Compulsory registration
in 5 countries out of 10.
- Totally free
in 5 countries out of 11.

THE MEMBERS OF NATIONAL ASSOCIATIONS

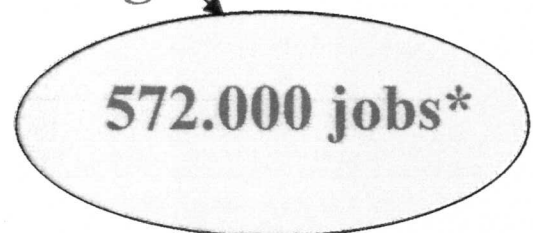


**Representativeness
of the national
associations:**



**Total Construction engineering
consultancy employment
in the 13 countries**

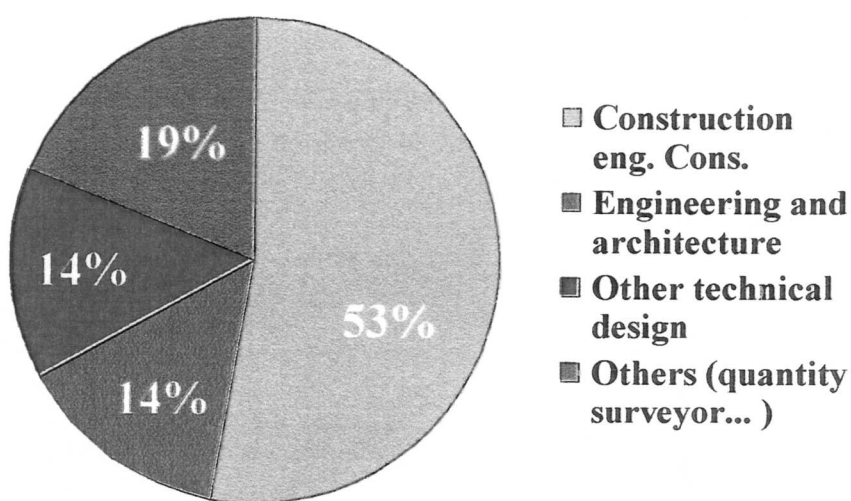
* India excluded



Average: 1 eng cons. job / 1000 inhabitants *

MAIN ACTIVITY OF MEMBER COMPANIES

distribution of the staff of member companies according to the main activity of the company



67 % of jobs are in companies whose main activity is engineering for construction / architecture

Other activities	Yes	No
turnkey projects...	6	5
operation, facility management	3	1
may remove the word engineer in the name of the association	3	9

HUMAN RESOURCES OF 14 ASSOCIATIONS

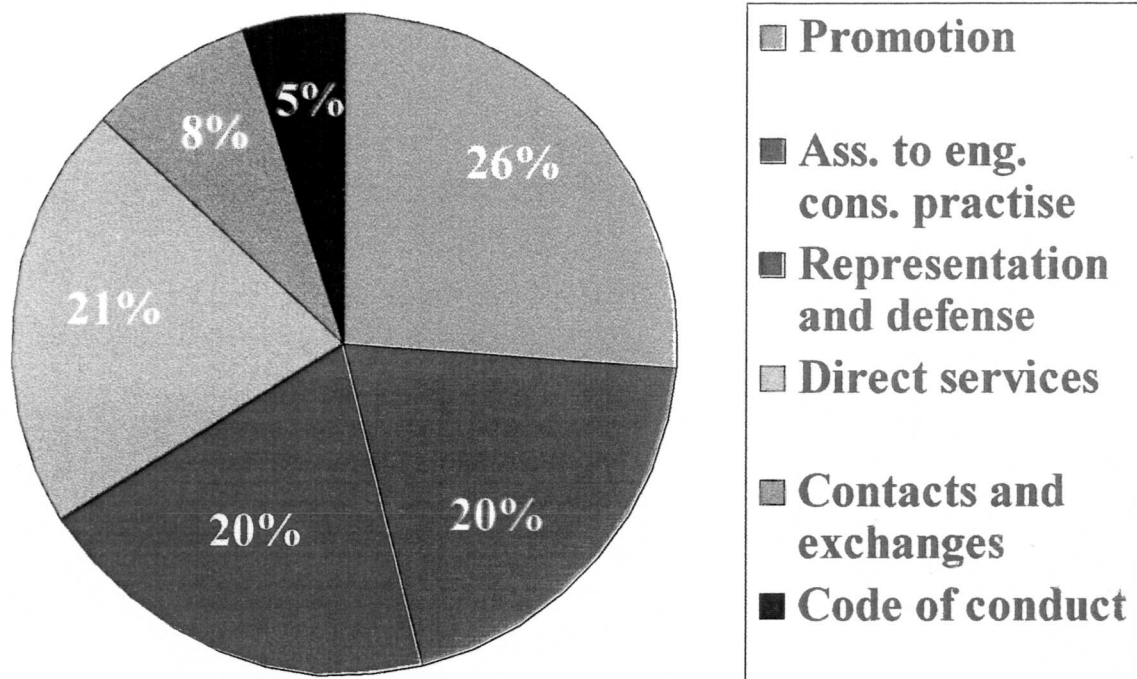
(full time equivalent)

PERMANENT EMPLOYEES	112
UNPAID VOLUNTEERS	94
TOTAL	206

1 person for 2,000 employees in
member firms ;

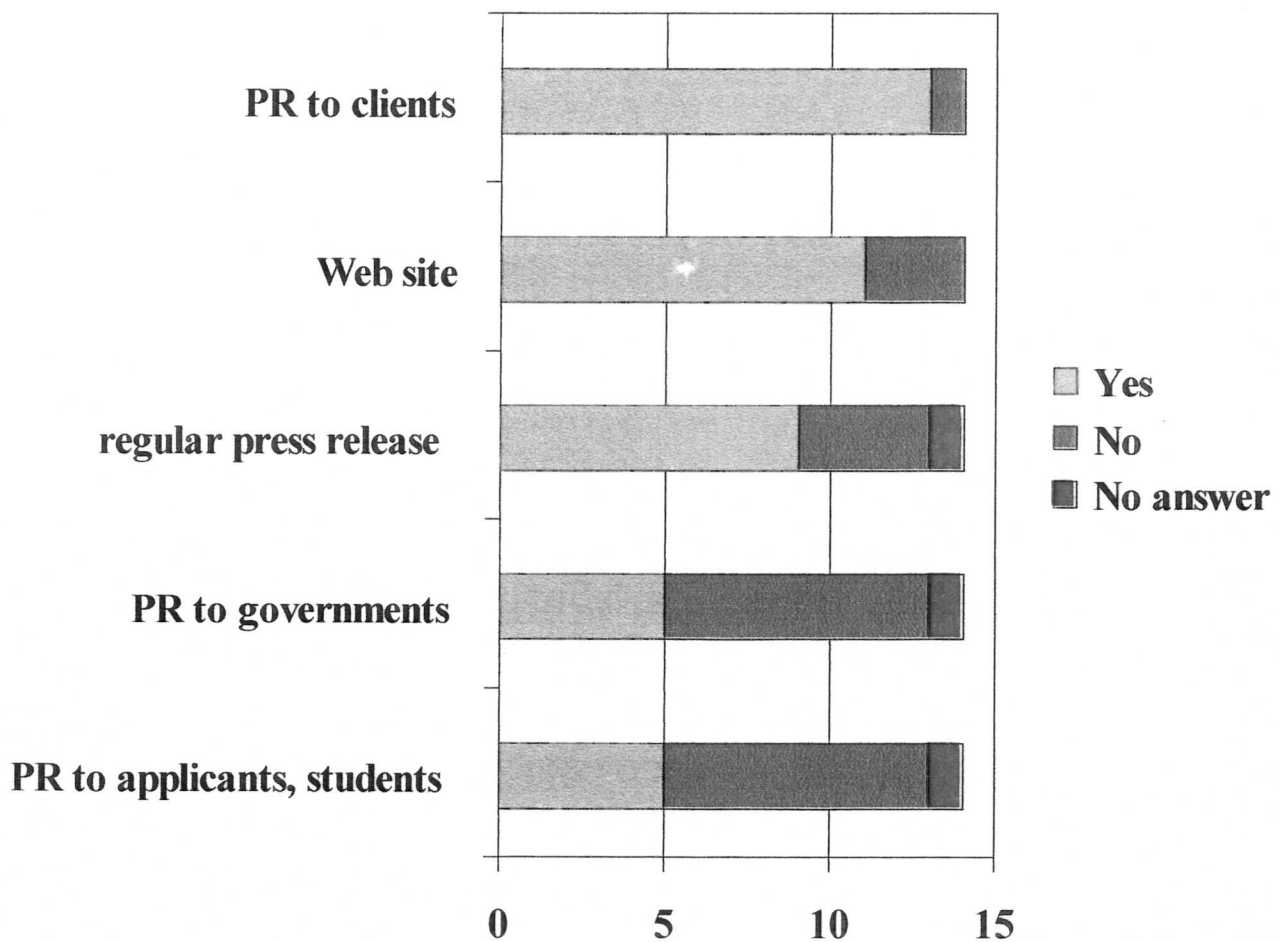
54 % are permanent
employees,
46 % are unpaid volunteers.

NATURE AND SIZE OF 14 ASSOCIATIONS ACTIVITIES



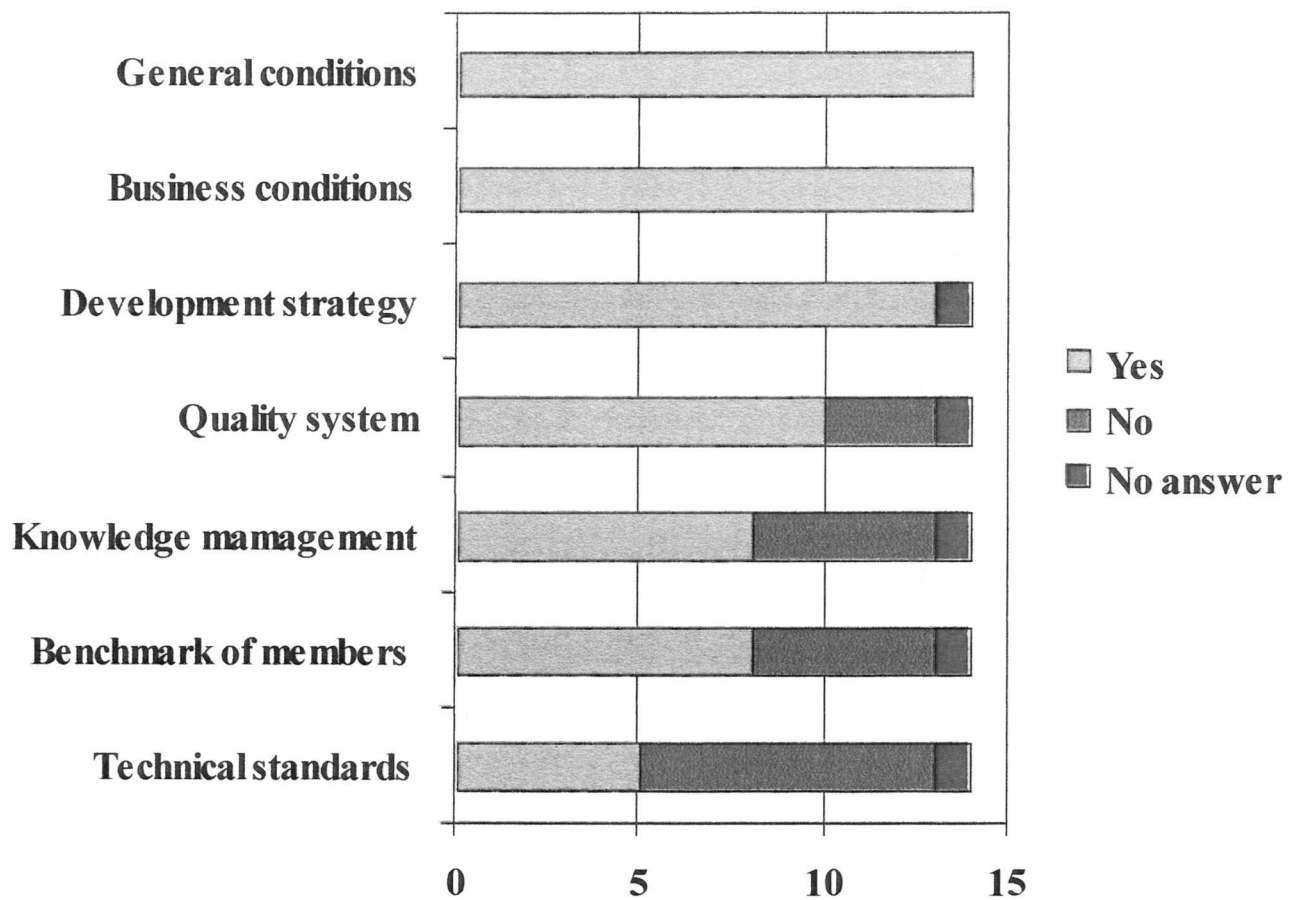
4 associations out of 11 are members of an employers' organisation

DETAILED PROMOTION ACTIVITIES



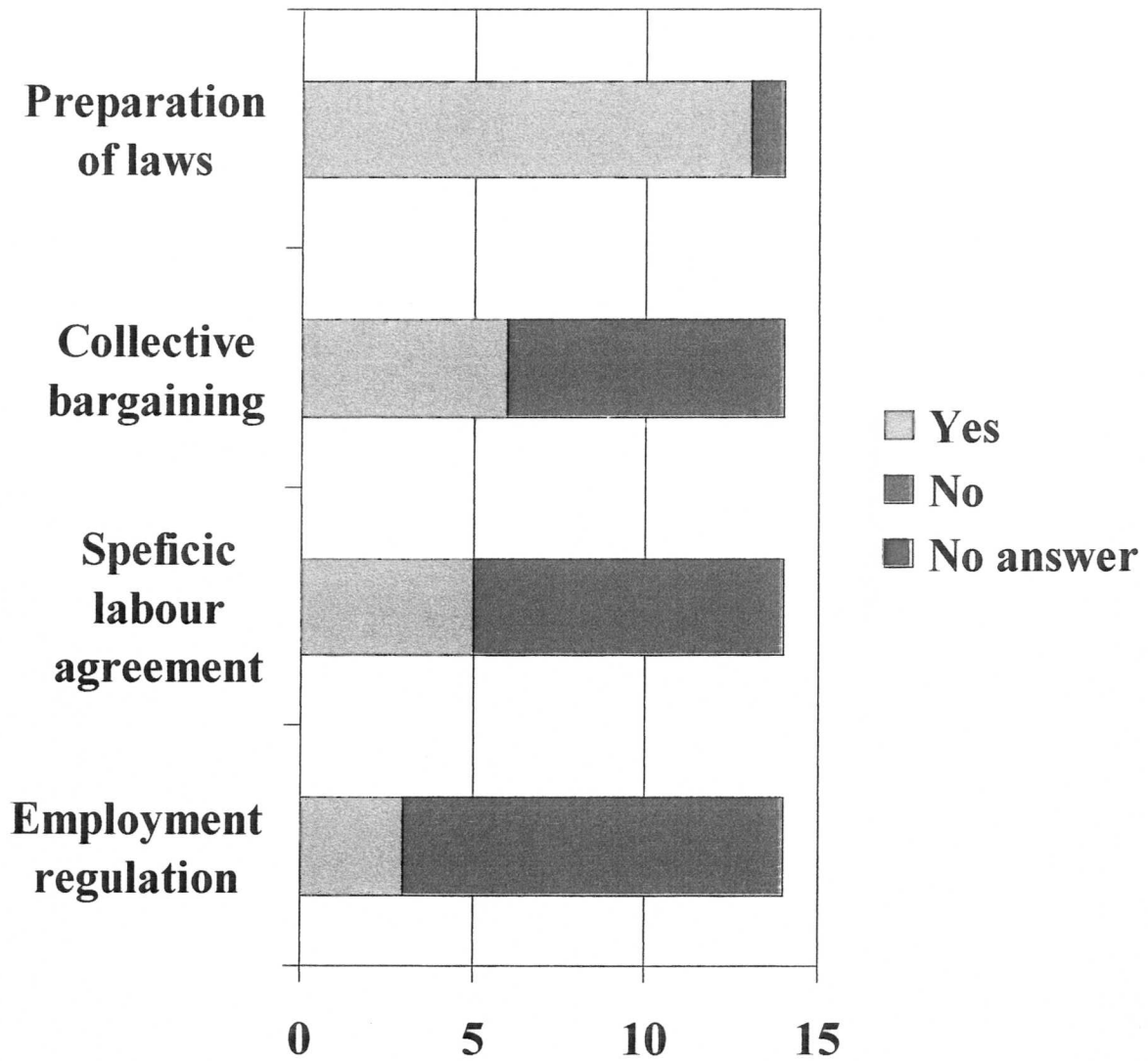
13 out of 14 associations deal with PR to clients

DETAILED ACTIVITIES ON ASSISTANCE TO ENGINEERING CONSULTANCY PRACTICE



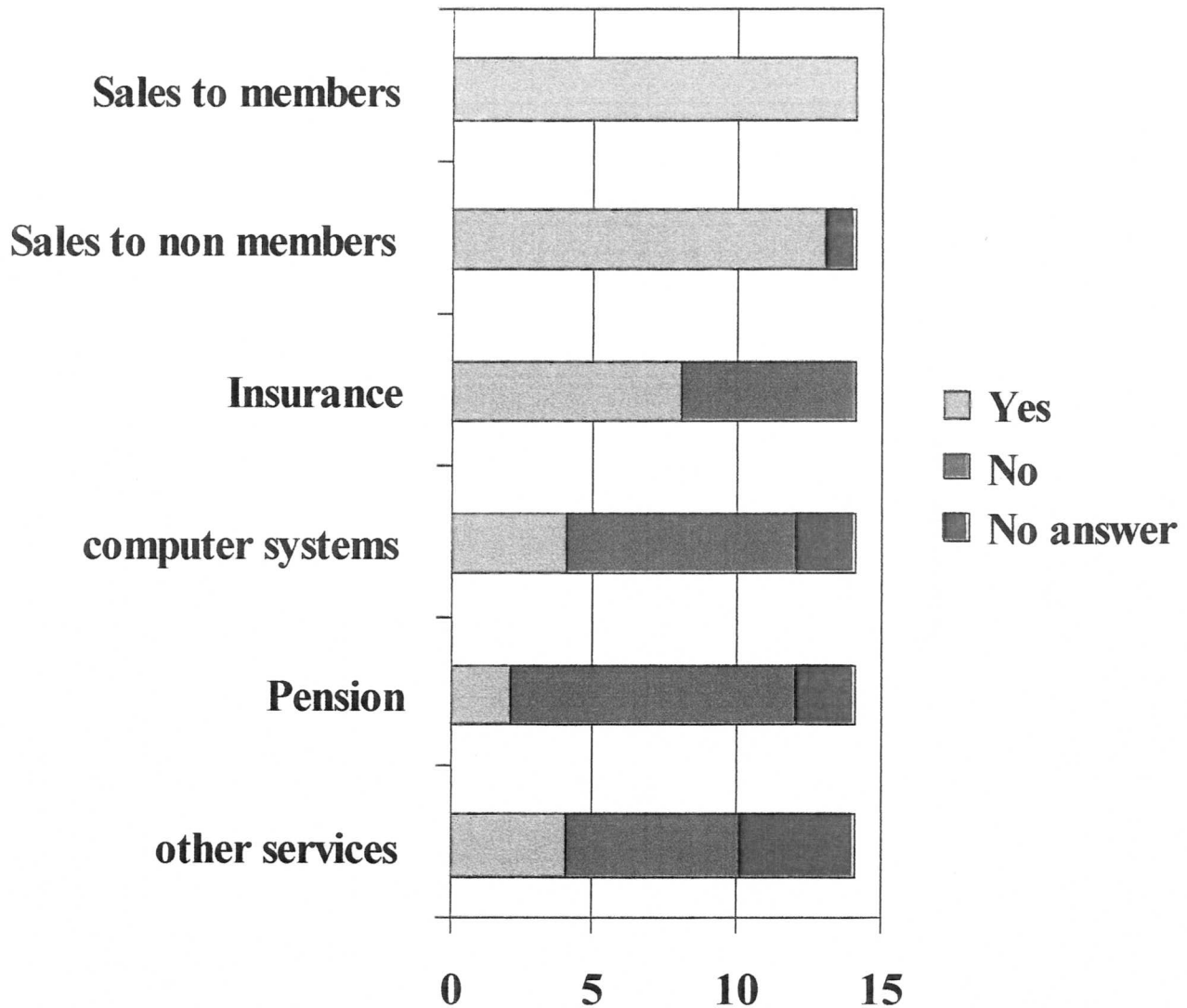
All associations deal with general and business conditions

DETAILED ACTIVITIES OF REPRESENTATION AND DEFENSE



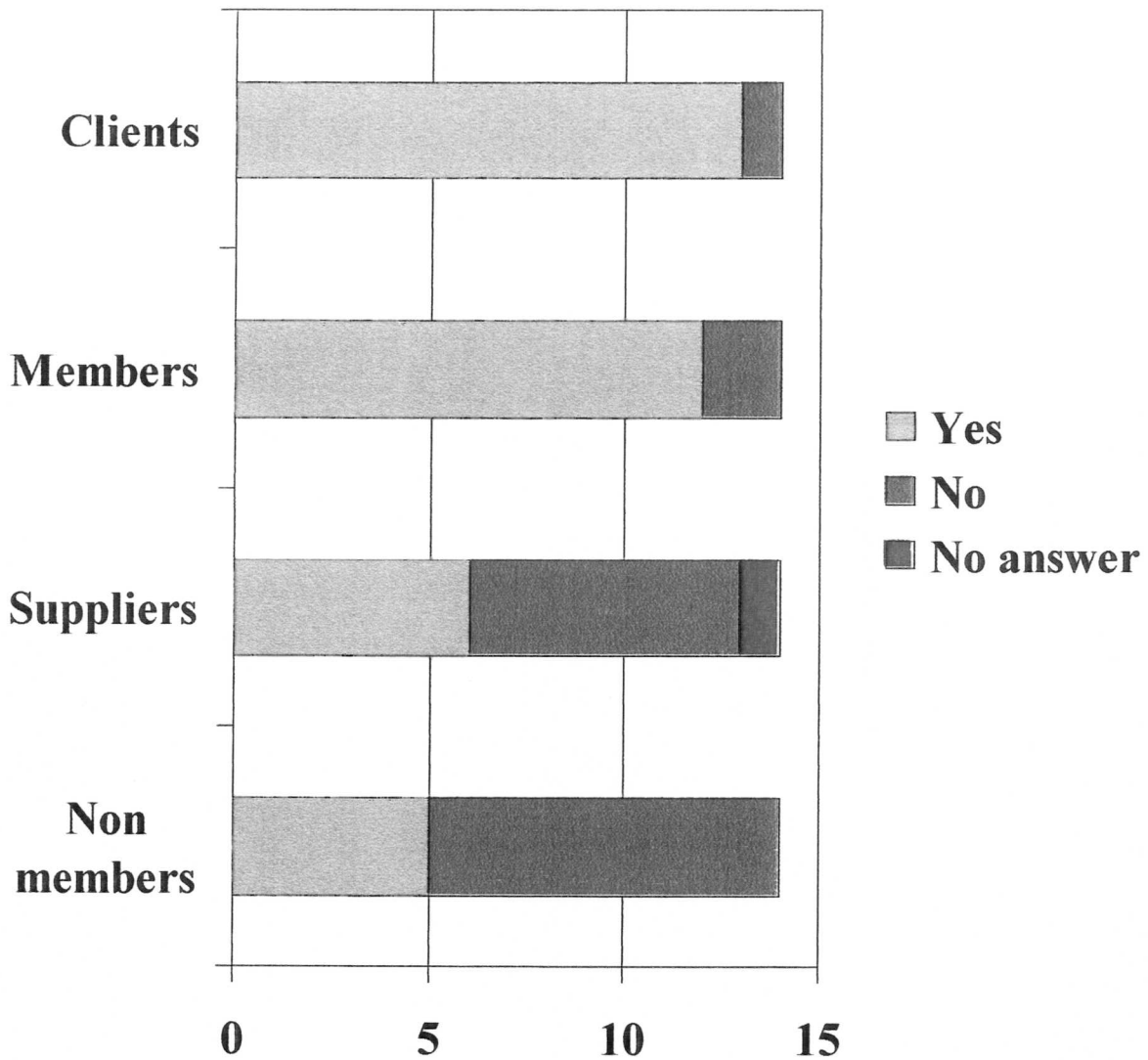
13 of 14 associations deal with legislation lobby

DETAILED SERVICE ACTIVITIES



All associations sell publications or services to their members

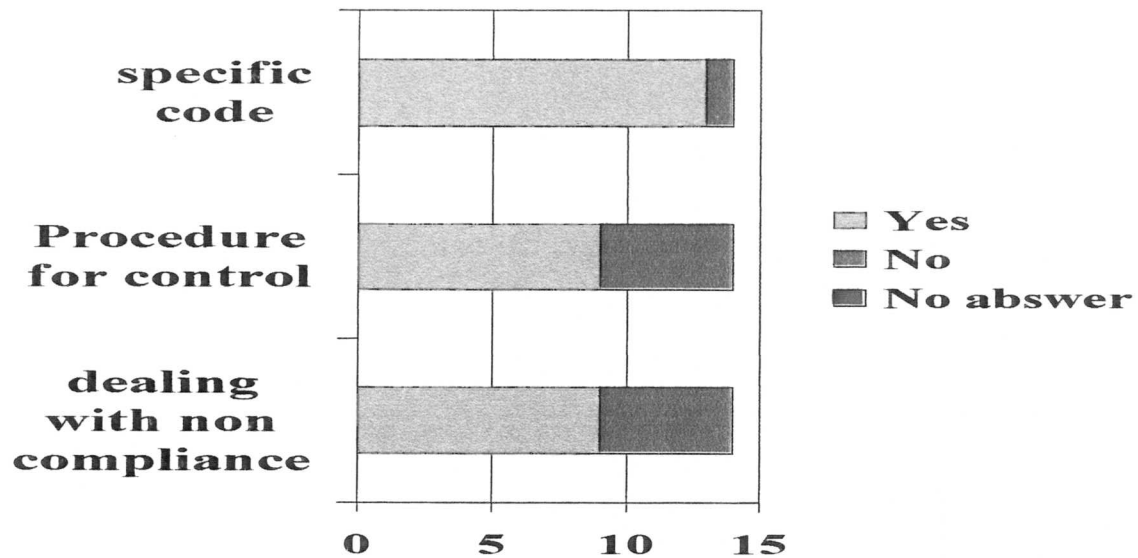
DETAILED ACTIVITIES : PROMOTION OF CONTACTS



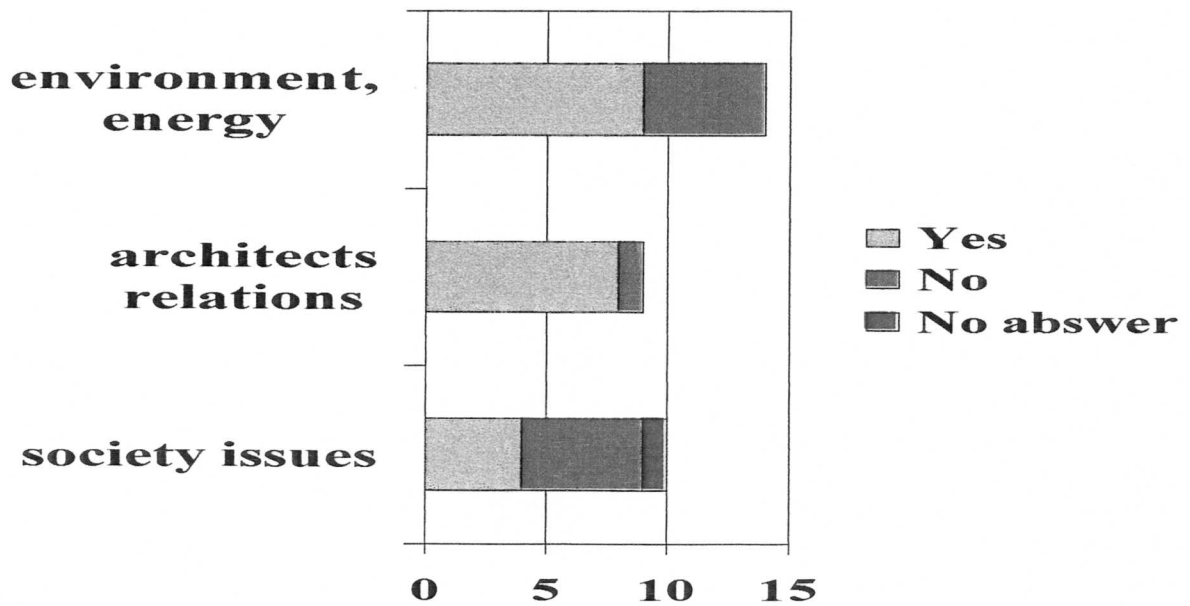
13 out of 14 associations promote contacts
between members and their clients

DETAILED ACTIVITIES

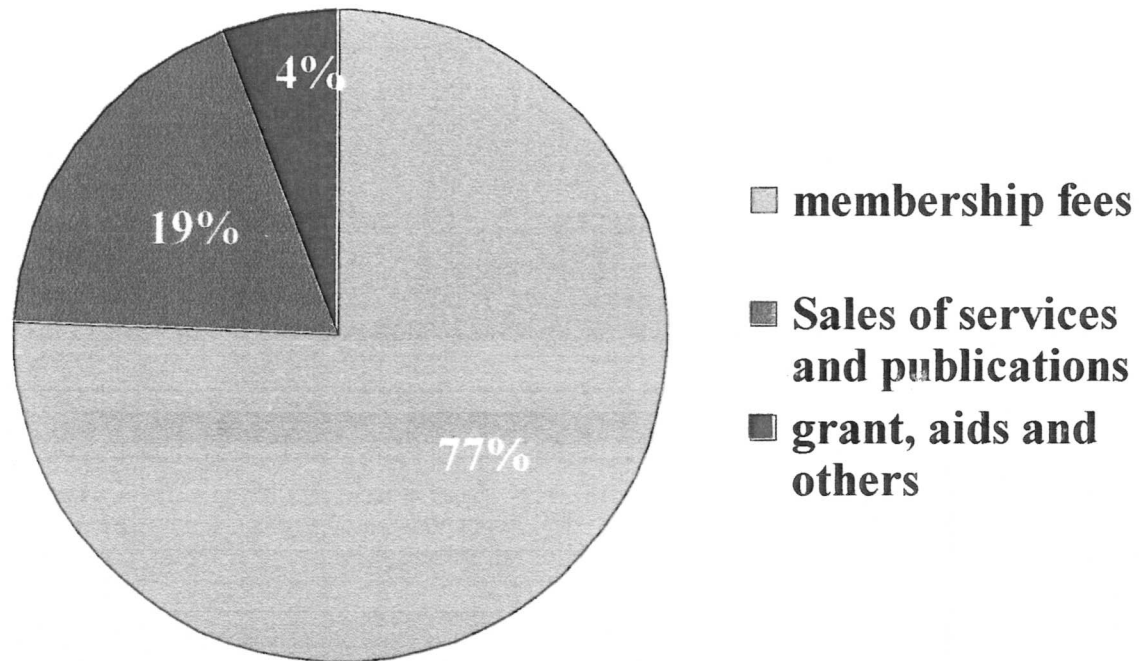
Code of conduct



Policy statements



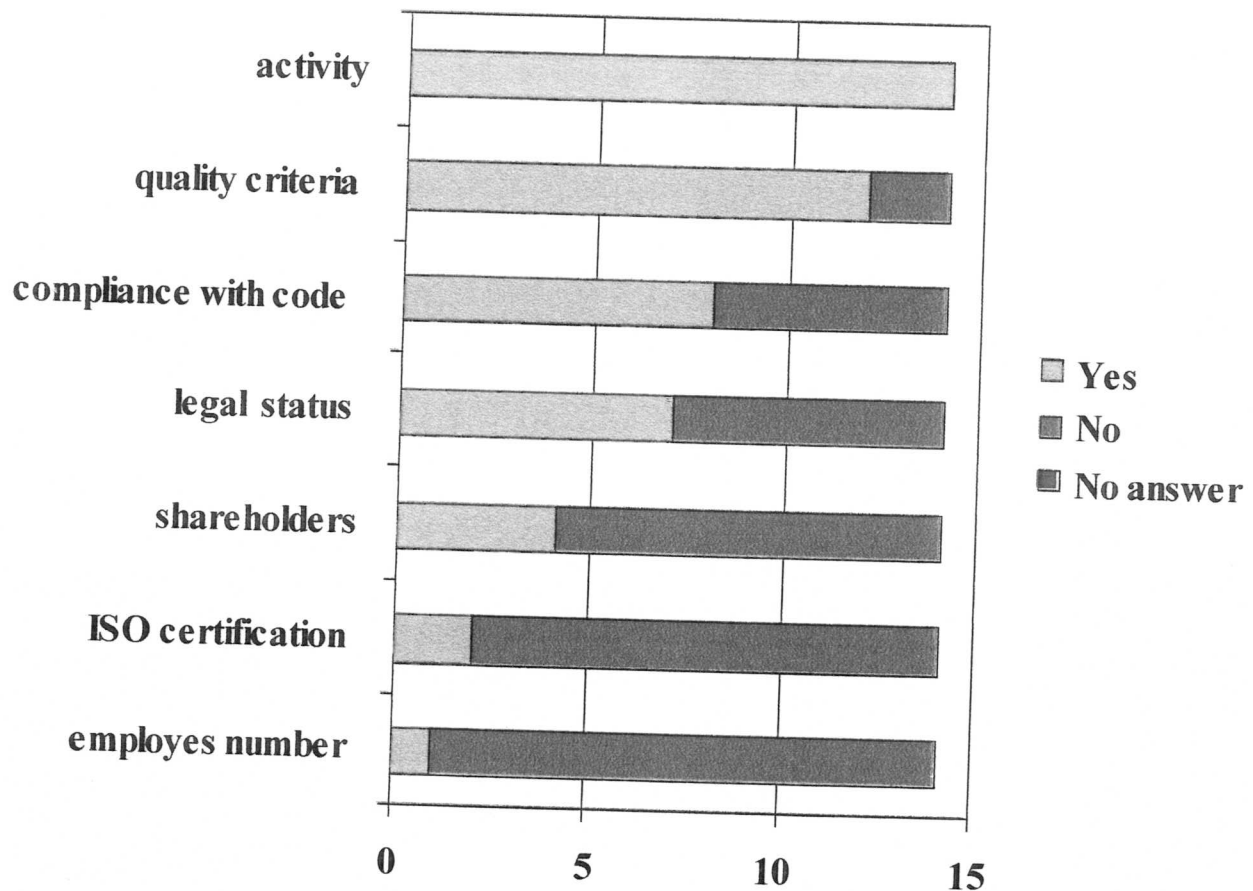
ANNUAL RESOURCES OF 14 ASSOCIATIONS



- All associations have a minimum membership fee
- 8 associations have a maximum membership fee
- 8 associations have special membership fees for groups or others

average membership fee = US \$ 32 /employee
in member companies

MEMBERSHIP CRITERIA



The nature of activities is a common criterion for all associations, but less than half of them use legal status or shareholder as a criterion.

FIDIC SURVEY ON NATIONAL ASSOCIATIONS ACTIVITIES																
Analysis of questionnaires, received before 5 of september 1999, by J.Felix., Syntec Ingénierie.																
(lightface type, is used for estimation, of informations missing or abnormal)																
OECD DATA, FORECAST / COUNTRY	CH	DK	FR	CR	H	NL	S	UK	IR	UG	SA	USA	IND	VT	TOTAL	WORLD
Population 97 (millions)	7,1	5,3	58,6	10,3	10,1	15,6	8,8	59	3,6	20	37,8	267	846	79	1428,2	
Gross domestic product 97 (1) (US\$ bin, purchasing power parities)	184,2	134,8	1248	134,8	100,3	345,6	180,8	1209	75,4	6,6	49,3	7824	381	24,8	11898	30,124
growth in volume of GDP 98+96 (2)	3,8%	6,0%	5,5%	-1,7%	9,7%	7,4%	4,7%	5,6%	20,2%			7,8%			7,00%	
1999+2000 forecast (2)	3,0%	3,6%	4,9%	1,9%	7,3%	4,6%	5,2%	2,3%	14,2%			5,6%			5,00%	
Gross fixed capital formation 97 (1) (US\$ bin, purchasing power parities)	36,1	22,5	213,3	17,6	21,1	69,1	24,8	188,6	14	1	20,2	1361	91	7,2	2087,5	6,627
growth in volume of GFCF 98/96 (2)	5,3%	17%	4%	-9%	21%	11%	5%	15%	23%			17%			14%	
1999+2000 forecast (2)	7,3%	4%	8%	1%	15%	2%	11%	4%	20%			7%			7,00%	
(1) Main Economic Indicators, OECD August 1999 page 214 and ...																
(2) Perspectives économiques OECD, June 1999, page 249 ...																
THE NATIONAL MARKET OF ENGINEERING CONSULTANCY FOR CONSTRUCTION (billions US \$)																
GFCF detailed (OECD 96, national accounts, table 1)																
percentage of construction	54%	49%	55%	50%	50%	52%	46%	51%	64%	50%	50%	52%	50%	50%	52%	
percentage of durable goods	46%	51%	45%	50%	50%	48%	54%	49%	36%	50%	50%	48%	50%	50%	48%	
Investments (US\$ bin)	35	30	180	11	8,3	83	20,6	141,5	10,6	0,05	15	1034	68	5,4	1642,5	
engineering studies percentage of inv.	10%	5%	6,7%	3%	25%	7,40%	14%	8%	8%	10%	8%	8%	10%	8%	8,0%	
engineering studies needs	3,50	1,50	12,06	0,33	2,08	6,14	2,88	11,32	0,81	0,01	1,20	82,72	6,80	0,43	131,77	
Distribution of eng studies																
professional engineering	50%	60%	53%	65%	50%	36%	80%	50%	40%	50%			60%	80%	53%	
in house serv. of suppliers	20%	30%	21%	25%	30%	29%	10%	26%	14%	20%			20%	10%	23%	
in house serv. of owners	30%	10%	26%	10%	20%	35%	10%	24%	46%	30%			20%	10%	24%	
total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%			100%	100%	100%	
Practice of eng. Consult.																
compulsory registration	No	No		Yes	Yes		No	No		Yes		Yes	No	Yes	5+	5-
legal restrictions	No	No			Yes		No	No		Yes	Yes		No		3+	5-
totally free	Yes	Yes		No	Yes		Yes	Yes		No	No	No	Yes	No	6+	5-
THE MEMBERS OF THE ASSOCIATIONS																
Number of members																
individual members		694	350	0	35	0	0	0	158		142	0	120	19	1518	
company members	270	352	866	57	26	300	300	635	104	13	367	5787	107	95	9279	
Total staff employed	4000	8942	21288	1722	1286	26850	7500	37500	1360	200	11500	282173	12000	3010	419331	
Average staff/company	15	25	25	30	49	90	25	59	13	15	31	49	112	32	45	
Number of employees /Main activity of the companies																
Eng. Cons. Constr.	4000	8692	19288	1722	871	24500	5000	37500	1360	200	11500	93456	12000	1600	221689	53%
Architects			0		15	0	2500								2515	1%
Eng. And Archi		250	350		150	1000						56736		850	59336	14%
Other technical design			150		200	100						59168		50	59668	14%
Technical Control			1500		50	100	incl.							210	1860	0%
Information Technology			0			800	units								800	0%
Management Consultancy						100						7680		50	7830	2%
Training						0						2832		40	2872	1%
Others (quantity surveyor...)						250						62301		210	62761	15%
Total	4000	8942	21288	1722	1286	26850	7500	37500	1360	200	11500	282173	12000	3010	419331	100%
Other activities																
Others (turnkey...)	Yes	No	Yes	No	No	?	No		No	No	Yes	Yes	Yes	Yes	6+	5-
Operation, facility manag.	Yes	Yes	No			Yes	few								3+	1-
to remove the word engineer ?	Yes	Yes	No	No	No	Yes	No		No	No	No	No	No		3+	9-
Representativeness /Main activity of the companies																
Eng. Cons. Constr.		85%	35%	35%		90%	30%			1%	80%			70%	47%	
Architects		0%	0%			0%	60%									
Eng. And Archi		85%				90%	35%									
Other technical design		0%	1%			1%										
Technical Control		15%	10%			1%										
Information Technology		15%	0%			2%										
Management Consultancy		10%	0%			1%										
Training		5%	0%													
Others (quantity surveyor...)		0%	0%			5%										



	THE BASIC ACTIVITIES OF THE ASSOCIATIONS															TOTAL	TOTAL
	COUNTRY	CH	DK	FR	CR	H	NL	S	UK	IR	UG	SA	USA	IND	VT		
Human resources																	
Number of pers. engaged ...	40	150	200	45		175	150	30	87		300						
permanents employees	2,5	12	11	0	0	8	6	11,5	1,5	0	11	45	4		112,5		
full time equivalent volunt.	10	15	6	3	3	3,5	3,5	30	8	3	4	5	0		94		
Total human resources	12,5	27	17	3	3	11,5	9,5	41,5	9,5	3	15	50	4	0	206,5		
member of empl. Organisa. related to an empl. org.	Yes No	No No	Yes No	No No	No No	Yes No	Yes No	No No	No Yes	No No	No No	No No	No No		4+ 12-		
Importance of activities of the associations																	
promotion	15%	30%	25%	15%	10%	24%	60%	25%		40%	26%	25%	20%	30%	26%		
practice of eng. Cons.	0	30%	15%	25%	15%	41%	5%	10%		52%	20%	25%	30%	0%	20%		
representation and defense	20%	10%	30%	20%	50%	12%	5%	20%		2%	20%	25%	25%	20%	20%		
direct services	48%	20%	15%	15%	10%	3%	20%	25%		4%	21%	20%	10%	30%	21%		
contacts and exchanges	15%	5%	15%	10%	10%	17%	10%	5%		1%	8%	4%	10%	10%	8%		
code of conduct	2%	5%	0%	10%	5%	3%	0%	15%		1%	5%	1%	5%	10%	5%		
others				5%			0%	0%									
total	100%	100%	100%	100%	100%	100%	100%	100%		100%	100%	100%	100%	100%			
PROMOTION OF ENGINEERING CONSULTANCY ... AND OF THE MEMBERS																	
a web site	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes	No	11+		
PR to clients	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	13+		
governments	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	13+		
applicants, students	No	No	Yes	No	Yes	Yes	Yes	No	No	Yes	No	No	No	Yes	5+		
others	Yes					Inst.	Public	No	No	Yes				Yes	3+		
press releases often, regu.	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	No	No	Yes	Yes		No	9+		
		7/y	3/y												4-		
PRACTISE OF ENGINEERING CONSULTANCY ...																	
knowledge management	Yes	Yes	No	No	No	Yes	Yes		No	Yes	Yes	Yes	No	Yes	8+		
business conditions	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	14+		
general conditions	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	14+		
quality system	Yes	No	Yes	Yes	Yes	Yes	No		Yes	Yes	Yes	Yes	No	Yes	10+		
technical norms	No	No	No	No	No	Yes	No		Yes	Yes	No	Yes	No	Yes	5+		
benchmark of members	No	Yes	No	No	Yes	Yes	Yes		No	Yes	Yes	Yes	No	Yes	8+		
development strategy	Yes	Yes	Yes	Yes	Yes	Yes	Yes		Yes	Yes	Yes	Yes	Yes	Yes	13+		
REPRESENTATION AND DEFENSE OF ENGINEERING ACTIVITIES ... AND OF THE MEMBERS																	
preparation of laws...	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	13+		
legal regul. of employment	Yes	No	Yes	No	No	No	No	No	No	No	No	No	No	Yes	3+		
existence of col. lab. agr.	Yes	No	Yes	No	No	No	Yes	No	Yes	No	No	No	No	Yes	5+		
bargainig of col. lab. agr.	Yes	No	Yes	No	No	No	No	No	Yes	Yes	Yes	No	No	Yes	6+		
SERVICES																	
Sales to members	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	14+		
Sales to non members	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes		13+		
Collective services for																	
insurance	Yes	Yes	No	No	No	Yes	Yes	Yes	Yes	No	Yes	Yes	No	No	8+		
pensions		Yes	No	No	No	No	No	No		No	No	Yes	No	No	2+		
computer equipments		Yes	No	No	No	Yes	No	No		Yes	No	No	No	Yes	4+		
other services			No	No	Yes	No	No			No	Yes	Yes	No	Yes	4+		
Promotion of contacts with																	
ass members	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	12+		
non members consult.	Yes	No	Yes	Yes	Yes	No	No	No	No	No	No	No	No	Yes	5+		
suppliers		No	No	No	Yes	Yes	No	No	No	Yes	No	Yes	Yes	Yes	6+		
clients		No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	13+		
others		No								No					2-		
Periodic conferences	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	14+		
CODE OF CONDUCT																	
Specific code of conduct	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	13+		
Procedure to control	Yes	No	Yes	No	Yes	No	Yes	Yes	Yes	Yes	Yes	No	No	Yes	9+		
dealing with non respect	No	Yes	No	Yes		Yes	No	Yes	Yes	Yes	Yes	No	No	Yes	9+		
policy statement																	
competitivity architects	No	Yes	No	No	Yes	Yes	Yes	No	No	No	Yes	Yes	No	No	6+		
environment energy	Yes	Yes	Yes	No	Yes	Yes	Yes	No	Yes	No	Yes	Yes	No	No	9+		
society issues	No	No	No	No	Yes	Yes	No	No	No	Yes	Yes		No	No	4+		



THE MANAGEMENT OF THE ASSOCIATIONS

COUNTRY	CH	DK	FR	CR	H	NL	S	UK	IR	UG	SA	USA	IND	VT	TOT.	TOT.
ANNUAL RESSOURCES IN 1998																
(thousands US \$)																
membership fees amount	400	1500	1600	14	36	1100	1100	1295	153	4	430	5583	15	12	13242	
sale of services and public.	8	100	50	2	2	50	400	165	15	0		2474	0,07	1	3267,1	
to members		60%	50%													
to non members		40%	50%													
grant, aid		0		0	0,002					0			0		0,002	
other income		0	50	0				33		0	165	493	0		741	
total	408	1600	1700	16	38	1150	1500	1493	168	4	595	8550	15,07	13	17250	17250,1
SUBSCRIPTION SYSTEM																
minimum (US \$)	650	670	Yes	Yes	Yes	500	270	470	281	100	366	215	23	110	14+	
maximum (US \$)	No	No	Yes	No	Yes	65000	No	18800	No	1000	No	17200	575	350	8+	6-
group conditions...	No	Yes	Yes	No	No	Yes	No		No	Yes	Yes		Yes	No	6+	6-
MEMBERSHIP CRITERIA																
Legal status	Yes	No	Yes	Yes	Yes	No	No	No	No	Yes	No	Yes	No	Yes	7+	7-
nature of activities	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	14+	
number of employees	No	No	Yes	No	No	No	No	No	No	No	No	No	No		1+	13-
nature of shareholders	Yes	No	No	No	No	Yes	No	No	Yes	No	Yes	No	No	No	4+	10-
ISO certificate	No	No	No	No	No	Yes	No	Yes	No	No	No	No	No	No	2+	12-
respect of code of conduct	Yes	Yes	No	Yes		Yes	No	No	Yes	Yes	Yes	No	No	Yes	8+	5-
quality criteria	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes	No	Yes	Yes	12+	2-
other criteria			Yes	Yes				Yes							3+	



(for example, operation, facility management), please specify:

.....

- Are you considering removing, in the near future, the word "engineer" from the name of your association? yes no

Volume of activity of your association

- Number of persons officially engaged within and outside your association (including the association in an official capacity):
- Number of full-time equivalent permanent remunerated employees in your association:
- Estimate of the full-time equivalent of the voluntary work carried out to the profit of your association :
- Is your association a member of a general employers' organisation? yes no
- or of an engineering consultant service related to an employers' organisation? yes no

2. NATURE AND IMPORTANCE OF ACTIVITIES OF YOUR ASSOCIATION

Please give your rough estimate of the percentage of resources (time and money) of your association dedicated to the six main types of activities described below:

- promotion (of engineering consultancy) %
 - practice of engineering consultancy %
 - representation and defense of engineering consultancy %
 - direct services to your members %
 - contacts and exchanges %
 - code of conduct %
 - other: %
- TOTAL: 100 %

The promotion of engineering consultancy and related services, and the promotion of your members

- Have you a Web site yes no
- Has your association significant activities in communication/PR, to:
 - clients yes no
 - governments yes no
 - applicants, students yes no
 - others: yes no
- Do you issue press releases? never seldom often regularly

type of association	cost in % of your expenditures	services rendered
.....
.....
.....
.....

Is your association a member of other international associations? What is the cost in percentage of your expenditures, and what services do they bring you ?

associations	cost	services rendered
.....
.....
.....

Is your association member of a regional organisation of engineering consultancy?

yes no

If yes, which:

4. THE ENGINEERING CONSULTANCY PROFESSION

The profession of engineering consultancy in your country. Engineering consultancy services for construction are carried out by engineering consultant firms, or by contractors or by in-house services. Let's try to estimate the importance of the various engineering consultancy services in your country.

Please give your rough estimates for:

- annual amount of investment in your country: A = billions of US \$ ²
- estimated percentage of engineering studies induced by these investments B = % ³
- total engineering studies needs : C = A X B = billions of US \$

Approximate distribution of C:

- part of C carried out by professional engineering consultancy firm %
- part of C carried out by in-house engineering of:
 - equipment suppliers: %

² This information is available in annual national accounts published by the OECD.

³ Your estimate

- public works firms or
- operators of systems or networks
- part of C carried out by in-house services of investors: %
 - public investors
 - private investors

TOTAL: 100 %

Professions related to engineering consultancy (firms, architects, other professions practising certain functions of engineering....). Your comments on the evolution of their activities in comparison with engineering consultancy.

.....

.....

.....

The main problems which presently confront your profession are:

.....

.....

.....

5. THE NATIONAL AND INTERNATIONAL CONTEXT

(figures in national accountants, in particular OECD data)

National activity:

- Population : millions
- Gross national product : billions US \$/year ⁴
- Public works (turn over) : billions US \$/year
- Gross Capital Fixed formation (investments): billions US \$/year

Growth of economic activity in your country during the last twelve months

+
estimation% or trend ↗ = 5

Growth of investments during the last twelve months

+
estimation% or trend ↗ =

Has there been during the last year any significant change of legislation or regulation in your country:

- impact on engineering consultancy activities having in direct
yes no
- engineering consultancy for practice of
yes no

⁴ most recent available, please indicate the year

⁵ please circle your answer

Please explain main changes

.....
...

Is the practice of an engineering consultancy in your country governed by:

- compulsory registration yes no
- legal restriction to practice yes no
- or totally free yes no

Other specific characteristics of your country and of the practice of the engineering consultancy activity in this country:

.....
.....

The position of your country in the field of international trade

Has there been any important change in your country in relation to international trade during the last year?

yes no

Had your association any involvement in international agreements, (GATT, KYOTO, WTO, international organisations,)?

yes no

If, yes, what was the purpose, and what was your point of view?

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.....

Continental level, same question:

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.....

Other main issues on international level that your association or your members are dealing with:

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Organisation of the FIDIC Directors and Secretaries Meeting Saturday, 18 September 1999

Morning session: the operation of national associations for consulting engineering.

Suggestions for issues to be debated:

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Issues on which your association could make a report:

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This questionnaire was filled by:

Name:

Function:

Address:

Telephone:

Fax:

e.mail: