



EUROPEAN  
INTERNATIONAL  
CONTRACTORS

# BRIEFING 2019

# MILESTONES (HIGHLIGHTS)

- |          |   |  |
|----------|---|--|
| April    | ➤ | EIC Spring 2019 Conference in Madrid   |
|          | ➤ | Participation at 2019 Spring Meetings of World Bank and IMF (CICA Mission)                                 |
| Mai      | ➤ | EU Task Force on Transport Connectivity in Africa  |
| June     | ➤ | Joint Action Plan EIC/EuDA/FIEC for Protecting the EU Services Industry                                    |
|          | ➤ | Meeting with EBRD Procurement Department   |
| July     | ➤ | EIC President Dessoy chairs Roundtable at AIIB Annual Meeting in Luxembourg                                |
| October  | ➤ | EIC Autumn Conference in Helsinki  |
|          | ➤ | Publication of "EIC Proposal for EU-Africa Partnership for Sustainable Infrastructure"                     |
| December | ➤ | Sneak Preview of the EIC Guide to the FIDIC "Yellow Book " (2017) at FIDIC International Users' Conference |

# FOREWORD

...from the President



Dear Reader,

Welcome to EIC's Annual Briefing for the year 2019. In this brochure, we present a brief overview of our federation's main activities during the past year, including reports on EIC's Working Groups and a summary of our Conferences. We are proud that the recommendations made in our publication titled "The Case for an EU-Africa Partnership for Sustainable Infrastructure" were well received by the EU Institutions (see p. 7).

I hope you enjoy browsing and reading through our Briefing 2019!

A handwritten signature in blue ink, which appears to read 'Dessoy'.

Philippe Dessoy  
EIC President

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# ABOUT EIC

## The EIC Mission

EIC has the objective...

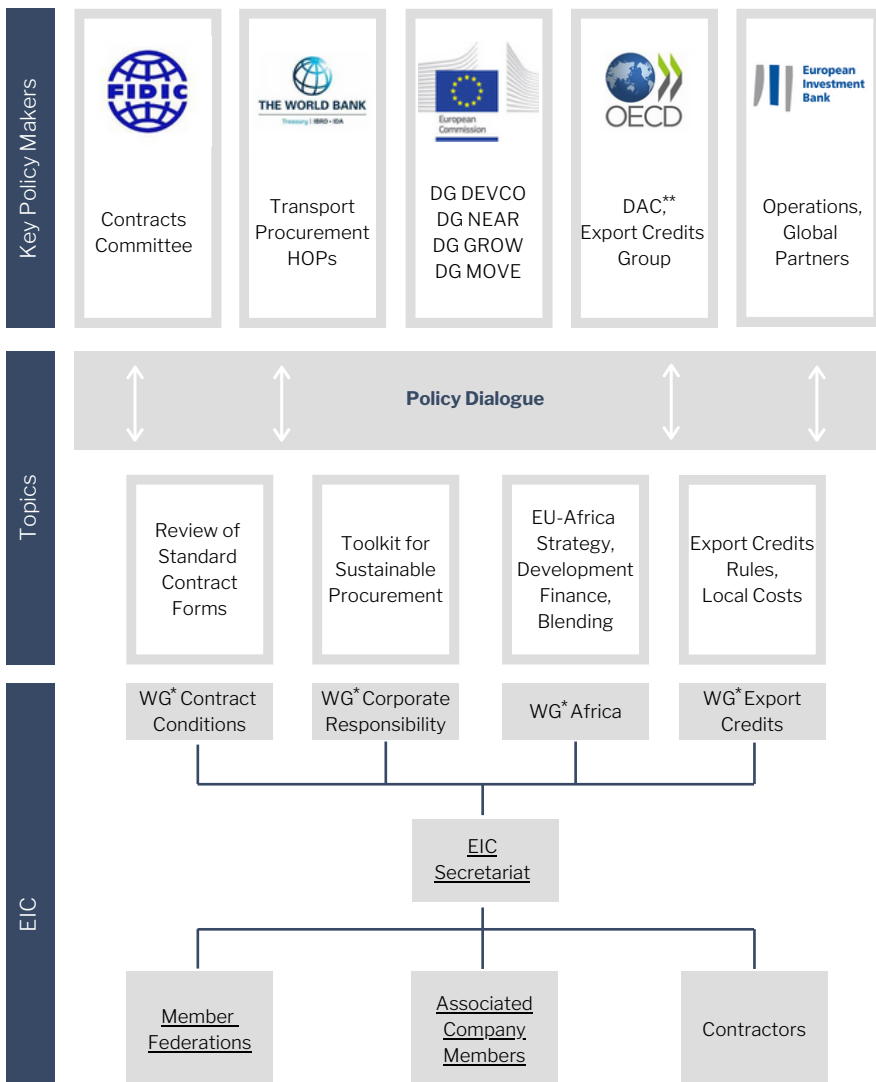
- to represent and promote the interests of the European construction industry in all matters relating to the international construction business.
- to foster the exchange of views with international and other relevant organisations in order to improve the political, financial, economic and legal environment for the international construction business.
- to offer interested contractors a unique forum for the exchange of experience in all matters relating to the international construction business.

European International Contractors (EIC) started its activities in 1970 as a network of internationally minded European contractors within FIEEBTP, the precursor of FIEC, and has been registered in Berlin as a legally independent industry association under German law since 1984. EIC's mandate is to promote the interests of the European construction industry in relation to its international business activities. Today, EIC has as its members construction industry trade associations from fifteen European countries, to which the internationally active European contractors are affiliated, as well as several associated member companies from construction-related industries and professions.

The European construction industry is a major power in the international construction business. In 2018, European international contractors were strongly engaged on all five continents and the total international turnover of companies associated with EIC's Member Federations amounted to around € 175 bn (see the EIC statistics on p. 18). Whilst in today's world there is a certain focus on the construction markets in the OECD region, many of EIC's member companies can also look back on a long tradition of dedicated engagement in the developing world. When operating in distant markets, European international contractors do not export a large part of their workforce, equipment, and material to distant sites, but they rely on a small number of key business personnel to manage projects in collaboration with local workforce and partners.

To bring across the positions and recommendations of European international contractors, EIC maintains close relations with all European and international policymakers, development finance institutions and other important organisations with policies relevant for the international construction business. These include the European Commission, the European Investment Bank, the European Bank for Reconstruction and Development, the OECD, the World Bank as well as other relevant non-governmental organisations, such as FIDIC or the Construction Sector Transparency initiative (CoST).

# EIC NETWORK AND CORE TOPICS



\*Working Group

\*\*Development Assistance Committee

# AFRICA

## Policy Context:

To drive forward intercontinental cooperation, the President of the European Commission launched the Africa-Europe Alliance for Sustainable Investment and Jobs. Under its umbrella, a Transport Connectivity Taskforce was launched in early 2019 with the goal to elaborate recommendations for enhancing transport cooperation between the twin continents. This taskforce was co-chaired by the then European Commissioners for Transport and International Partnership, Violeta Bulc and Neven Mimica, as well as the African Union Commissioner for Infrastructure and Energy, Amani Abou-Zeid.

## Working Group Activities in 2019

The European Commission invited EIC to the Task Force as a stakeholder for the private sector to share its experience and recommendations and to explore opportunities beneficial to African and European economies alike.

The Taskforce held various meetings from January to July 2019 arranged in three clusters: Connectivity and Infrastructure, Road Safety and Aviation. Its goal was to deliver tailor-made recommendations involving countries, international organisations, stakeholders, civil society, donors and international financial institutions. EIC participated in the Commission's Taskforce on Transport Connectivity in Africa together with the Chairman of EIC's Working Group Africa.

Key aspects discussed in the cluster on Connectivity and Infrastructure included the need to engage quality infrastructure delivery and investments ("value for money").

EIC WG Africa Chairman Combes with EU Commissioner for Transport Bulc and EFCA Secretary General van der Putten



Further, there is a necessity to address policy, strategy and regulatory reforms from a full life-cycle perspective and vis-à-vis economic, social and environmental (climate change) sustainability requirements. Stakeholders agreed to develop a roadmap on infrastructure financing and to improve the current setting of the Programme for Infrastructure Development in Africa (PIDA).

Together with African Transport Ministers and representatives from Development Finance Institutions, such as the African Development Bank (AfDB), EIC developed a set of guidelines on how infrastructure delivery may be improved in Africa and provided feedback on several issues such as:

- Transport Sector Policy Changes
- Considerations for the local industry
- Infrastructure asset maintenance needs
- Lack of sustainability in Work Requirements
- Mobilising investment for Public Private Partnerships
- How to introduce competitiveness in Development Aid

# AFRICA

## Policy Context:

In March 2019, the European Commission published a Communication titled “EU-China – A strategic outlook” that aims to make Europe’s approach to China more realistic and assertive. The new policy approach was launched at a time when Chinese state-owned construction companies, supported by a phalanx of state funding agencies acting outside the consensus of multilateral export and development finance rules, have become highly successful delivering major infrastructure projects in third markets and, particularly, in Africa.

## EIC Study for an EU-Africa Partnership

After analysing the Chinese infrastructure delivery model in Africa, EIC published a report presenting “The Case for an EU-Africa Partnership for Sustainable Infrastructure”.

In response to the European Commission’s proposed new EU-China Strategy, EIC has called upon policy-makers in the EU Institutions and in Member States to aspire a change from being a “Global Payer” to becoming a “Global Player” as regards promoting infrastructure connectivity between Europe and Africa. This shift may be achieved by establishing a new “EU-Africa Partnership for Sustainable Infrastructure” under the umbrella of the Africa-Europe Alliance for Sustainable Investment and Jobs with the goal to increase the EU’s visibility in infrastructure development in Africa and to contribute to the UN Sustainable Development Goals.

A EU-Africa Partnership for Sustainable Infrastructure would complement the efforts undertaken by OECD partners, notably the

United States and Japan, and would also ensure a level playing field for European infrastructure providers in Africa. To make this vision a reality, the European Union needs to:

- Put a stronger emphasis on the infrastructure sector and re-design the European development finance architecture in a way that makes it capable of providing the full set of available financial instruments – including grants, loans, and guarantees – with varying degrees of concessionality;
- Create an international level playing field by untying European ODA to other OECD and to non-OECD countries on a reciprocal basis only;
- Establish a more sustainable tender process by incorporating all environmental and social health and safety (ESHS) standards and practices used currently by the World Bank as prerequisite for disbursement of EU ODA grants.

EIC’s study has received widespread appraisal with parts reproduced by BusinessEurope in its position paper “[The EU and China - Addressing the systemic challenge](#)”.

The full EIC Study can be downloaded from this [information website](#).



# CONTRACT CONDITIONS

## Policy Context:

The FIDIC standard forms of contract have been in widespread use internationally for decades. They are the contract of choice for many international infrastructure projects. In December 2017, FIDIC published the second edition of the Red Book (Conditions of Contract for Construction), Yellow Book (Conditions of Construction for Plant and Design Build) and Silver Book (Conditions of Contract for EPC Turnkey Projects) ("2017 FIDIC Suite"). This set of documents may also be used for projects financed by the Multilateral Development Banks as part of their standard bidding documents.

## Working Group Activities in 2019

For 50 years, EIC's Working Group Contract Conditions has been reviewing and commenting on the FIDIC standard forms of contract. It has drafted "EIC Contractor's Guides" on the FIDIC 1999 forms of contracts and is currently working on the production of guidance to the FIDIC 2017 suite.

In January 2019, the EIC Working Group "Contract Conditions" undertook a "friendly review" of a proposed new FIDIC standard form for "DBO Projects for the Upgrading of Existing Facilities" (Draft "Bronze Book"). Given that the industry standard currently provides for separate forms of contracts, one covering Design-Build and the subsequent form covering the operations and maintenance phase of a project, EIC feels a certain degree of uneasiness with the proposed form in that the "Bronze Book" assigns to the Contractor a strict responsibility for the quality, or any loss or damage to the asset, or loss of production of the facility for a period of 20 years or more. EIC criticises that the contractor needs to assume a concessionaire's role, while exposing him to a

much higher degree of financial liability, which might be unacceptable for most contractors.

In June, EIC met with the EBRD's Procurement Department in London and submitted a checklist of questionable Particular Conditions incorporated by employers around the world into the FIDIC standard forms of contract to shift the fair balance of the FIDIC "Red & Yellow Books" in their favour. Against this background, EIC welcomed that FIDIC responded with the new FIDIC "Golden Principles" to the frequent misuse of its standard forms of contract by ill-advised employers.

EIC urged the EBRD and other multilateral and bilateral development banks, who have entered into bilateral agreements with FIDIC to use the FIDIC 2017 suite of contracts, to implement the new rules on all future infrastructure projects that they are financing.

EIC Director Kehlenbach at the FIDIC Users' Conference, London



During the FIDIC Users Conference in December 2019 in London, EIC announced the upcoming publication of the [EIC Contractor's Guide to the FIDIC 2017 Yellow Book](#). In preparing this first EIC Guide on the FIDIC 2017 Conditions of Contract for Plant and Design Build, EIC continues the tradition of its EIC Guides to the FIDIC 1999 edition and shares its comments on matters of importance and only at length where there are issues at stake.



# CORPORATE RESPONSIBILITY

## Policy Context:

Corporate Responsibility has become an integral part of the social consciousness of many companies across the globe and as such it is a crucial element of global business. European international contractors believe that technical expertise, economic success and good corporate citizenship are inseparable objectives of a contemporary company strategy. The valid principles of the UN Sustainable Development Goals (SDGs) need to be mainstreamed into the procurement policies of development financing institutions and those of their clients.

## Working Group Activities in 2019

The Working Group “Corporate Responsibility” is working on a guidance document for Multilateral and Bilateral Development Banks (MDBs) and their Borrowers on incorporating sustainability aspects in tender procedures.

Currently, most infrastructure tenders financed by the MDBs are awarded to the lowest evaluated bidder although choosing on price alone does not account for quality, sustainability, and service delivery. In order to assess how bidders can protect human rights, treat workers fairly, protect the environment and support strong, resilient local communities, the procurement framework needs to address a broader set of factors than simply price.

The Working Group already published the [EIC Corporate Responsibility Report](#) in 2018, and is currently preparing a toolkit on how to award construction projects in an objective manner to the Most Economically Advantageous Tender (MEAT). In its meetings throughout 2019, members established common ground on how a project life cycle approach can be thoroughly



EIC President Dessoy at the AIIB Conference in Luxembourg

considered in the project design, prequalification, selection and award phases.

In July 2019, EIC President Dessoy co-chaired a Roundtable on Improving Environmental, Social and Governance (ESG) Performance in Infrastructure at the Annual Conference of the Asian Infrastructure Investment Bank (AIIB) in Luxembourg. The seminar engaged participants from the public and private sector to share lessons learned in promoting the implementation of ESG standards on major infrastructure projects and to discuss mechanisms for connecting MDBs, bilateral DFIs, industrial associations and their member companies to collaborate on delivering sustainable infrastructure projects. The AIIB emphasised a need for a global methodology on ESG performance, in particular on Health & Safety, in order to identify best practice.



Our commitment, as a leading European industry association, is to embrace our responsibility and contribute to the long-term sustainable development aligned to the goals of the 2030 Agenda for Sustainable Development.

# EXPORT CREDITS

## Policy Context:

The OECD Arrangement on Officially Supported Export Credits, the OECD Consensus, is a "gentlemen's agreement" amongst its participants from Australia, Canada, the European Union, Japan, Korea, New Zealand, Norway, Switzerland, Turkey and the United States. The main purpose of the Arrangement is to provide a framework for an orderly use of officially supported export credits and fostering a level playing field to encourage competition among exporters based on quality and prices of goods and services exported rather than on the most favourable officially supported export credits.

## Key Topic 2019

EIC has initiated a discussion on OECD level to modify the OECD Consensus on the threshold for the insurance of local costs and to improve competitiveness in direct export activities.

EIC argues that the current OECD approach regarding the coverage of local costs, which currently allows for no more than 30% to be insured by export credit agencies (ECAs), is no longer appropriate in relation to construction services. Contrary to the manufacturing industries, the nature of the construction industry for the most part requires local production as any construction project needs to be erected in the buyer's country. Therefore, the respective amount of local costs involved is evidently higher than in the case of export of goods or other services.

In 2019, the European Union adopted a common standpoint to increase the insurance threshold from 30% to 50% of the export contract value and submitted its position for discussion within the OECD Work Group on Export Credits. Whilst such an amendment might be a step forward for most exporting industries, it will still be

insufficient for the construction sector. Hence, EIC collaborated with the Business and Industry Advisory Committee to the OECD to produce a comprehensive Position Paper for the OECD consultations in mid-November 2019 in Paris.

The BIAC paper rightly emphasises that current treatment of local costs is especially problematic for large-scale turnkey projects in developing markets where localisation requirements have outgrown the OECD limit, and for the opportunity for ECAs to play a more active role supporting the global sustainability agenda. In addition, the BIAC paper highlights that the nature of construction services is such that building or infrastructure "products", e.g. roads, railways, ports, dams, hospitals, etc., are provided locally and that it is therefore necessary for construction exporters to source construction materials, labour force and sometimes equipment locally.

# FAIR INTERNATIONAL COMPETITION

## Policy Context:

The EU is the world's largest economy, accounting for some 20% of global GDP, and thus depending on an efficient international trading system. China, more than other trade partners, is taking advantage of existing imbalances in the international trade system. The fact, for instance, that China it is not bound by OECD agreements in the field of export and development finance, which limit tied aid, regulate credit practices, impose social, environmental and governance standards on financing activities, is distorting the international level playing field.

## Key Topic 2019

EIC monitors China's selective international trade commitments and unregulated official finance practices to analyse the distortion of competition between European and Chinese construction companies.

In June, EIC developed together with FIEC and EuDA a comprehensive Plan of Action on how to protect the EU services industry against unfair competition from third country companies. The Action Plan was submitted to the highest level of the European Commission and highlights that, under the WTO umbrella, there are mechanisms in place protecting the European goods manufacturing industry from unfair dumping and/or subsidy practices, whereas services are largely neglected. Therefore, the federations have called upon the EU Commission to extend the existing EU legal framework to the European services industries.

As a follow-up, the federations published a joint Position Paper in September, titled "Fostering a Level Playing Field in Construction Services", which documents elements of unfair competition both inside the EU and in overseas markets. Following the publication,

EIC alongside FIEC asked the EU Institutions to enshrine the reciprocity principle of the WTO Government Procurement Agreement (GPA) into the proposed EU Regulation for an International Procurement Instrument (IPI). The federations further advocated that Chinese state-owned enterprises and their subsidiaries should not be allowed to compete for EU-financed public tenders within the Internal Market as long as European contractors are legally prevented from bidding for domestically financed projects in China.

In December, EIC teamed up with the European industry umbrella federation, BusinessEurope, and contributed substantial input for a Position Paper titled "The EU and China – Addressing the Systemic Challenges". The chapter on ensuring fair competition in third markets incorporates several recommendations made in EIC's Position Paper on Africa. (see page 07)

# WORLD BANK

## Policy Context:

Amongst the Multilateral Development Banks, the World Bank is at the forefront of defining the strategic role of procurement in achieving key development effectiveness goals. This includes emphasising choice, quality, and value for public spending as well as to better manage environmental and social risks of projects and to improve development outcomes. The Environmental and Social Framework (ESF), launched in October 2018, offers systematic coverage of environmental and social risks, and makes important advances in areas such as transparency, non-discrimination and accountability.

## Key Topic 2019

EIC liaises with the World Bank's Procurement and Transport Departments through CICA and provides the European perspective on all proposed changes to the World Bank's standard bidding documents.

In mid-April, EIC met with the World Bank's Procurement Department in Washington D.C. in the context of a CICA mission to the World Bank/IMF Spring Meeting. The objective was discussing the Bank's uptake of FIDIC's 2017 edition of standard forms of contract after the World Bank had announced that it had entered into a bilateral agreement with FIDIC to use the FIDIC 2017 suite for its major infrastructure projects. EIC seized this opportunity to urge the World Bank to implement FIDIC's new "Golden Principles", including the principle of fair risk allocation, on all future infrastructure projects it finances.

In May, EIC met with the World Bank's Transport Department in Brussels. The department was in

World Bank Chief Procurement Officer de Laurentiis in Helsinki



the process of collecting data on the number of incidents, fatalities and serious injuries at infrastructure working sites to benchmark the health and safety performance of projects financed by the World Bank. EIC warned the Bank that it should not consider the collection of a maximum amount of data as a panacea for improving performance, as those data needed careful interpretation and alignment with the respective local social insurance regulations. EIC also asked the Bank to not necessarily focus its efforts only on developing a "one-size fits all" reporting tool, but to also scrutinise what measures and tools were available and being implemented for the prevention of accidents and injuries at worksites.

At the EIC Autumn Conference in Helsinki, EIC welcomed the World Bank's Chief Procurement Officer, Enzo de Laurentiis, who discussed with EIC delegates the World Bank's new approach for strengthening contractors' performance in preventing gender-based violence (GBV) and sexual exploitation and assault (SEA). In future, all Bank-financed major civil works contracts associated with a high GBV/SEA risk, would use the Dispute Avoidance/Adjudication Board (DAAB), the FIDIC-based contractual mechanism, for monitoring contractors' compliance with GBV/SEA contractual obligations.

# EIC CONFERENCES

## The EIC Platform

With its bi-annual conferences, EIC offers an interactive and dynamic platform for European international contractors and their business partners throughout the construction value chain. In connection with these events, EIC organises Business Workshops on recent trends and developments in the international construction business. EIC conferences are always co-organised by a host federation; in 2019, the EIC Spring Conference took place in Madrid, Spain, and the Autumn Conference brought participants to Helsinki, Finland.

## EIC Spring Conference: Madrid

EIC's 2019 Spring workshop in Madrid looked at disruptive innovation and how new technologies bring both chances and challenges onto the construction business.

For the EIC Spring Conference 2019, the host federation SEOPAN welcomed more than 100 participants in Madrid. The workshop titled "Disruptive Innovation in Society and the Built Environment – Impact on the Activities of International Construction Companies" was met with great interest.

The panel of speakers was of exceptionally high quality and brought together experts from such varied fields as data science, digital engineering, smart construction and more. Emerging technologies, and key digital topics such as BigData, Blockchain, Artificial Intelligence and Deep Learning and their potential impact but also great potential were discussed in panels, while key note presentations offered a more detailed

Panelists in Madrid: Ms. Ribeiro (Telefónica), Mr. Pistoni (Zeleros), Mr. Pérez (Acción), Mr. Ondiviela (Microsoft), Mr. Zimmermann (CEMEX) and Mr. de Ávila (Sacyr)



EIC's Turkish Representatives: Ms. Cinar and Mr. Bora

insight how the "built environment and infrastructure as a service" may be and are being improved.

The Workshop concluded with these the key findings for an immediate future:

- Disruption and change are going to shape the future. We need to be ready for it.
- We are not in an era of change; we find ourselves in a change of eras.
- No single company can drive transformation in isolation. Collaboration and strong networks are key.
- Be agile: "The big elephants are trying to dance with the gazelles".
- The most important thing is to get people involved in managing the change.



# EIC BOARD

## Polymaking in EIC

Each Member Federation is entitled to nominate an internationally experienced contractor as member of the EIC Board. The Board determines the policy of EIC within the scope of the principal resolutions adopted by the General Assembly.

Each Board Member is elected by the General Assembly for an initial term of two years which may then be extended.

 <p><b>Philippe Dessoy</b> General Manager Business Development // BESIX <b>President</b></p>		
 <p><b>Wouter Remmelts</b> Managing Director // BAM International <b>Vice President</b></p>	 <p><b>Juha Kostialainen</b> Management Board // YIT <b>Treasurer</b></p>	
 <p><b>Nils Bjelme</b> Senior Vice President and Head of Civil Engineering // NCC Infrastructure</p>	 <p><b>Selim Bora</b> President and Chairman of the Managing Board // SUMMA Group</p>	 <p><b>Lars Carlsen</b> Deputy General Manager // Aarsleff</p>
 <p><b>Benoit Chauvin</b> Deputy General Manager, Head of corporate Business Development // COLAS</p>	 <p><b>Matteo d'Aloja</b> Head of External Relations &amp; Communications // Ghella S.p.A.</p>	 <p><b>Juan Elizaga</b> Innovation &amp; Media Director // Ferrovial Agroman SA</p>
 <p><b>José Pedro Freitas</b> CFO // Mota Engil Group</p>	 <p><b>German Grüniger</b> General Counsel // Implenla</p>	 <p><b>Zoe Lysaridou</b> Bid Manager // Avax SA</p>
 <p><b>Karl-Heinz Strauss</b> CEO // PORR</p>	 <p><b>Jörg Wellmeyer</b> Managing Director // Strabag International</p>	

# MEMBER FEDERATIONS

## A Federation of Federations

EIC Members are national construction industry federations from 15 European countries that are directly or indirectly affiliated to the European Construction Industry Federation (FIEC).

The internationally active companies affiliated to the EIC Member Federations are an integral part of the EIC network and invited to take part in the Working Groups, General Assemblies and Workshops.



**VIBÖ**  
**Austria**

Vereinigung Industrieller  
Bauunternehmungen Österreichs



**Belgium**

Confédération Construction //  
Confederatie Bouw



**Bulgaria**

Bulgarian Construction  
Chamber



**Denmark**

Dansk Byggeri //  
Danish Construction Association



**Finland**

Rakennusteollisuus // Conf. of  
Finnish Constr. Industries



**France**

Syndicat des Entrepreneurs  
Français Internationaux



**Germany**

Hauptverband der Deutschen  
Bauindustrie



**Greece**

Panhellenic Association of  
Engineers  
Contractors of Public Works



**Italy**

Associazione Nazionale  
Costruttori Edili



**Netherlands**

Netherlands Association of  
International Contractors



**Portugal**

FEPCOP



**Spain**

SEOPAN



**Sweden**

Sveriges Bygginstitut



**Switzerland**

Schweizerischer  
Baumeisterverband



**Turkey**

Turkish Contractors Association



# ASSOCIATED COMPANY MEMBERS

## Expanding the EIC Network

Associated Company Members participate in the debates that shape the future of the international business. As part of the EIC network they contribute to formulating the private sector's response to current policy challenges. Representatives of Associated Member Companies are invited to learn about the latest market trends in the EIC Business Workshops and to meet key decision-makers from European and International Institutions as well as senior executives from Europe's leading international contractors in the context of the EIC Conferences.

 **aebi schmidt**  
group

**Aebi Schmidt**

**AECOM**

**AECOM**  
UK

 **Cybarco**

**Cybarco**  
Cyprus

 **driver** GLOBAL  
CONSTRUCTION  
CONSULTANCY

**Driver Group**  
UK // Netherlands

 **EY**  
Building a better  
working world

**EY**  
Netherlands

**FENWICK  
ELLIOTT**

**Fenwick Elliott**  
UK

 **HOMY**  
MODULAR BUILDING SOLUTIONS

**Homy**  
Switzerland

**LALIVE**

**Lalive**  
Switzerland

**LANGAN**

**Langan**  
U. S. A.

 **nordic  
guarantee**

**Nordic Guarantee**  
Sweden

 **Pinsent Masons**

**Pinsent Masons**  
UK

 **PS Consulting**  
GcIIA member firm

**PS Consulting**  
France

 **QUANTUM  
GLOBAL  
SOLUTIONS**

**Quantum Global Solutions**  
Qatar

 **RAMBOLL**

**Ramboll**  
Denmark

 **SECO**

**SECO**  
Belgium

 **VINTAGE  
CONSULTING**

**Vintage Consulting**  
Poland

# INTERNATIONAL CONTRACTS STATISTICS

## EIC Statistics

In collaboration with its Member Federations, EIC publishes an annual International Contracts Statistics which provides an in-depth view of how the international construction market is developing for European contractors. The EIC Statistics are to be seen as a complement to the ENR data which also lists electrical contractors, steel builders, oil and gas companies, etc. and collects total instead of construction group turnover.

## Turnover 2018

The European construction industry remains a major power in the international construction business and, collectively, European international contractors account for around 50% of the revenues of the world's leading international

contractors, according to date published annually by the U.S. magazine ENR. For a variety of reasons, however, the regional focus has changed from the classical export markets to the OECD region.

	Austria	Belgium	Denmark	Finland	France	Germany	Italy <sup>2</sup>	NL	Portugal	Spain	Sweden <sup>3</sup>	Turkey	Total
Companies reporting	4	5	6	1	14	16	12	6	20	9	3	45	141
<b>International Total</b> in million EUR	<b>18.885</b>	<b>5.501</b>	<b>699</b>	<b>1.160</b>	<b>42.995</b>	<b>28.695</b>	<b>13.756</b>	<b>10.185</b>	<b>5.280</b>	<b>17.325</b>	<b>14.251</b>	<b>17.224</b>	<b>175.956</b>
without Europe	1.460	2.406	233	0	17.945	25.184	10.378	3.004	4.792	11.479	6.010	10.378	<b>93.269</b>
without Europe and North America	1.429	2.403	233	0	11.746	12.502	8.129	2.494	4.792	6.483	0	10.378	<b>60.589</b>
without Europe, North America and Australia	1.420	2.320	184	0	9.414	1.581	7.381	2.330	4.792	5.043	0	10.332	<b>50.472</b>
<b>Regional Total</b>													
Europe	17.425	3.095	466	1.160	25.050	3.511	3.378	7.181	488	5.846	8.241	6.846	<b>82.687</b>
North America (U.S.A. and Canada)	31	3	0	0	6.199	12.682	2.249	510	0	4.996	6.010	0	<b>32.680</b>
America (Central and South)	637	346	216	0	1.885	435	886	572	2.345	3.553	0	250	<b>11.095</b>
Oceania/Australia	9	83	0	0	2.332	10.921	748 <sup>(4)</sup>	164	0	1.440	0	46	<b>15.743</b>
Asia	169	626	1	0	3.128	531	1.076 <sup>(4)</sup>	558	0	39	0	1.934	<b>8.062</b>
Africa	57	356	15	0	3.531	246	1.895	287	2.447	268	0	2.128	<b>11.230</b>
Middle East <sup>1</sup>	557	993	0	0	900	369	3.524	913	0	1.183	0	6.020	<b>14.459</b>

<sup>1</sup> Afghanistan, Bahrain, Egypt, Iran, Iraq, Israel, Jordan, Kuwait, Lebanon, Oman, Qatar, Saudi Arabia, Syria, United Arab Emirates and Yemen (North and South)  
<sup>2</sup> Source: ENR, The Top 250 International Contractors 2018, published in August 19/26, 2019. Currency rate: 1 EUR = 1.18 US\$ (Official rate for 2018 of the European Central Bank)  
<sup>3</sup> EIC's own research  
<sup>4</sup> As figures for Italy cannot be split between Australia and Asia, the figure is an approximate value.

# EIC SECRETARIAT

## EIC Offices

The EIC Secretariat is based in Berlin, at the premises of the German Member Federation, Hauptverband der Deutschen Bauindustrie.



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**Communication Officer**



**David Hanel**

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**Senior Policy Adviser**

## Partners

EIC partners with the European Construction Industry Federation (FIEC), and with the Confederation of International Contractors' Associations (CICA), on all matters of common interest and concern.



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