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MESSAGE FROM THE PRESIDENT

An organisation like EFCA can only exist with the persistent commitment and effort of those who give so freely of their time and expertise for the betterment of the Industry. Since the launch of our forward plan in May 2017 we have created three new task forces, two board sub-committees and re-constituted a dormant working party. These new groups compliment and support the work of all our existing committees. On behalf of our 25 member associations, I would like to sincerely thank all our volunteers for their enthusiasm and commitment to achieving our goals.

2018 will be a big year for EFCA as our Forward Plan begins to bear fruit. Along with FIDIC and VBI, we are determined that the 49th FIDIC Infrastructure Conference held in Berlin from the 9th to 11th September will be the best yet and look forward to an excellent attendance from Europe. We also look forward to the FIDIC Regional Infrastructure Conference in Georgia on 8th and 9th March.

On behalf of the EFCA board, I would like to wish you all compliments of the season and the very best for a healthy and successful 2018.

Regards,

Kevin Rudden

EFCA BAROMETER autumn 2017 - State of the consulting engineering sector

According to the latest EFCA [Barometer](#), market conditions are positive for the coming six months.



Market signals are positive: twelve out of 20 countries have seen an increase in the average order stock of the consulting engineering companies.

As a result, turnover is also increasing. Eleven out of 20 countries expect the total turnover of the consulting engineering industry in their country to increase. Profitability is improving.

The average EBITDA-ratio in Europe was 5.1% in 2016. Profitability is expected to improve or remain stable in 2017 and 2018 in all countries except Greece (2017) and Belgium (2018).

Finally, there is an expectation that numbers of staff will increase in eight out of 20 countries.

In conclusion, activity in the consulting engineering industry in Europe is stable and improving. The market is good or very good in 12 out of 20 countries. Only Greece is expected to face continued difficulties.

The main challenges facing European consulting engineers are low fees and lack of qualified staff. Moreover, political uncertainty is affecting the market, because some factors are not predictable such as the Brexit-related uncertainty, self-proclaimed independence of Catalonia, the geopolitical tensions and security threats in Europe.

See also: [European Commission Autumn 2017 Economic Forecast](#): continued growth in a changing policy context and the OECD's latest [Economic Outlook](#)

New Communications Task Force: getting priorities right

When preparing the 2020 Forward Plan, the key issue consistently raised was that although EFCA has been extremely successfully in critical lobbying activities, our traditional approach to communications no longer works. While we keep telling people about these wins, they don't necessarily hear us, as a result of the vast amounts of information they receive on a daily basis.

We are delighted that our new Communications Task Force has been established in accordance with the commitments given in our Forward Plan. We are particularly delighted that our Task Force includes four experienced communications professionals who held EFCA's current communication plan to the light and discussed the appropriate social platform for EFCA to network and share information.

During a brainstorming session, the experts reviewed the basic (and other target) audience, needs and goals, actions and tools of EFCA's internal and external communications. A first step agreed on is the revision of the content of the EFCA website (text and navigation buttons). The website will be rebuilt in a responsive layout.

Thereafter, EFCA will make its profile visible on LinkedIn. LinkedIn will be used to share the federation's knowledge body, offer up-to-date information and exchange ideas with others. The task force determined to elaborate the EFCA communication plan in the coming year.

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Jaap de Koning and the Board of Directors review the 2018 Internal Market Committee plan



Jaap de Koning

Jaap de Koning, Chair of the Internal Market Committee, and the Board of Directors set out the strategy to reinforce the Committee's actions and lobby wins.

The Committee will present an outline for a practical MEAT (most economically advantageous tender) guidance, including real examples, at the 1 June 2018 General Assembly meeting in Gent.

New topics for the Committee's further consideration are: the European best practice award for clients, a European compilation of statistical data on award notices and procedures, and selection criteria (demonstrating national differences in the application of the 2014 Directive), and advancing the clients' strategic use of public procurement for a European innovative, sustainable and competitive economy.

Full commitment to implementing new key goals

At the autumn meeting of national Directors, EFCA President Kevin Rudden reported progress in getting new task forces off the ground to assist in realising the 2017-2020 Forward Plan.

He informed about the steps taken by the Board and the secretariat towards the 10 new federation goals.

Enthusiastic Directors invited all colleagues to join forces and to take on the tasks ahead to the ambitious targets.

The afternoon session focussed on sharing best practices and reviewing daily practices, performances and strategies of national associations. The meeting split up into three discussion groups: (1) Lobbying, (2) Creation of member benefits and (3) Effective association management.

As the half-yearly meetings are considered a valuable, fruitful and inspiring forum for connecting with peers and to learn from each other, the Directors agreed to encourage and mobilise the absent colleagues through a buddy system.



Meeting co-chair Andrea Šehić - meeting chair Mario Marti – EFCA Secretary General Jan Van der Putten

E F C A A G E N D A

Internal Market Committee	Brussels	11.01.2018
BIM Task Force	Brussels	19.01.2018
European External Aid Committee	Brussels	30.01.2018
Communications Task Group	Brussels	06.02.2018
Board of Directors meeting	Belgrade	23.02.2018
Regional Infrastructure Conference	Tbilisi (Georgia)	7-9 March 2018
Board of Directors meeting	Brussels	13.04.2018
Directors & Secretaries General meeting	Brussels	24.04.2017
Barometer Task Group	Brussels	08.05.2018
Internal Market Committee	Prague	11.05.2018
Board of Directors meeting	Gent	31.05.2018
EFCA GAM	Gent	01.06.2018
FIDIC-VBI-EFCA Conference	Berlin	9-11.09.2018
Board of Directors meeting	Lisbon	21.09.2018
Board of Directors meeting	Brussels	23.11.2018



As is customary in the last issue of the year, the EFCA team wishes all Bulletin readers all the best for the festive season and a prosperous, happy and peaceful 2018!



E U R O P E A N B R I E F I N G

€1 billion investment in transport network development

Urban investment Support (URBIS): helping cities to plan investments

EU External Investment Plan: green light for five investment areas

2018 budget agreed with cuts in development aid

Aid for Trade Strategy 2017

Juncker Plan exceeds €250 billion in investment

Third Report on State of the Energy Union: need to adapt energy infrastructure

EU Industrial R&D Investment Scoreboard

Industry across Europe is responsible for more than half of all carbon dioxide

Annual Climate Change Performance Index

Consultation on a European Labour Authority and a European Social Security Number

€1 billion investment in transport network development

The investment is made under the [Connecting Europe Facility](#), the EU fund supporting infrastructure networks.

It combines - for the first time - EU grants with financing from the European Investment Bank, National Promotional Banks and private banks

The selected projects will upgrade Europe's rail network, further develop alternative fuels infrastructure and pave the way for zero emission water transport.

As announced in the [Clean Mobility Package](#) of 8 November 2017, an additional grant amount of €350 million is made available for alternative fuels infrastructure, via the [CEF Blending call](#). The deadline for projects submission is 12 April 2018.

Urban Investment Support (URBIS): helping cities to plan investments

URBIS is developed in partnership by the [European Commission](#) (DG REGIO) and the [EIB](#) in the context of the [EU One Stop Shop for Cities](#) and in support of the ambitions defined in the [EU Urban Agenda](#).

Cities of all sizes in all Member States can apply for URBIS' support via a web page hosted on the [European Investment and Advisory Hub](#).

URBIS will start by using the existing advisory and project services of the European Investment Bank and will focus on a selected number of assignments.

EU External Investment Plan: green light for five investment areas

The [European External Investment Plan](#) will unlock €44 billion of private investment for Africa and the EU Neighbourhood countries by 2020.

Concrete areas for investment, the so-called "investment windows", are:

- Sustainable Energy and Connectivity
- Micro, Small and Medium Sized Enterprises (MSMEs) Financing
- Sustainable Agriculture, Rural Entrepreneurs and Agribusiness
- Sustainable Cities
- Digital for Development.

The European Commission will invite eligible financial institutions, for example development banks, to present their concrete proposals for investment programmes within these five areas. After an [assessment](#) by the Commission and independent experts, a number of selected financial institutions will be entrusted with managing these investment programmes. The first agreements with such financial institutions are expected to be signed in the first half of 2018.

Businesses and organisations, who would like to benefit from support under the EIP, will then be able to contact these financial institutions with their project proposals. A dedicated EIP secretariat and a web portal will help to guide interested businesses.

2018 EU budget agreed with cuts in development aid

The EU member states and the European Parliament struck a [deal](#) on the EU's [budget](#) for 2018. Total commitments are set at €160.1bn and payments at €144.7bn.

The 2018 budget focuses strongly on priorities such as boosting economic growth and job creation, strengthening security and addressing the challenges posed by migration. Compared to 2017, long-term development aid was cut by 6%.

Aid for Trade Strategy 2017

The [Communication](#) 'Aid for Trade - Achieving Prosperity through Trade and Investment' It puts a strong focus on Least Developed Countries, and countries in situations of fragility.

The Commission also proposes to better coordinate tools for development finance of aid for trade and improve synergies with other instruments, such as EU trade agreements, trade schemes or the EU's [External Investment Plan](#).

Juncker Plan exceeds €256 billion in investment

[Deals](#) approved under the European Fund for Strategic Investments (EFSI) are now expected to trigger 81% of the initial €315 billion investment target.

Third Report on State of the Energy Union: need to adapt energy infrastructure

The [Third Report on the State of the Energy Union](#) shows that Europe's energy market integration and transition to a low-carbon, secure and competitive economy is well underway.

At the same time, the Commission is underlining the importance of building a well interconnected and integrated trans-European energy grid in its [Communication on strengthening Europe's energy networks](#).

In this context, the Commission adopted the third list of [Projects of Common Interest \(PCI\)](#). The chosen projects can take advantage of a number of benefits including faster permitting procedures and the right to apply for funding from the [Connecting Europe Facility \(CEF\)](#).

EU Industrial R&D Investment Scoreboard

Worldwide, companies' R&D investment increased by 5.8% over the previous year, the sixth consecutive year of significant increases. The increase was driven by the ICT services sector (up 11.7%).

The EU group raised its R&D by 7.0% - more than the global average, just less than the US (7.2%) but much more than Japan (-3.0%). China increased its R&D by 18.8% but its total R&D is still minor compared to the size of its economy.

Industry across Europe is responsible for more than half of all carbon dioxide

The industrial pollution country [profiles](#) published by the European Environment Agency (EEA), show that the sector remains a significant source of pollution.

Annual Climate Change Performance Index (CCPI)

The report, now in its 13th edition, is ranking 57 of the world's major countries in order of commitment to emissions reductions and other tenets of the Paris Agreement.

The index left the top three places empty and concluded that no country worldwide has done enough across the 14 indicators evaluated to be classed in the 'very high' section.

Consultation on a European Labour Authority and a European Social Security Number

Whereas the European Labour Authority should ensure that EU rules on labour mobility are enforced in a fair, simple and effective way, the European Social Security Number (ESSN) is to simplify and modernise citizens' interaction with administrations in a range of policy areas.

Legislative proposals for both initiatives are announced in the European Commission's Work Programme for 2018 and planned to be tabled by spring 2018.

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