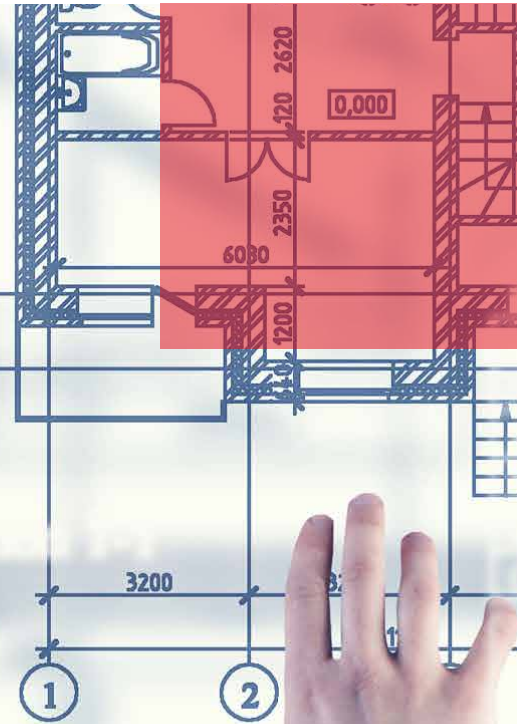
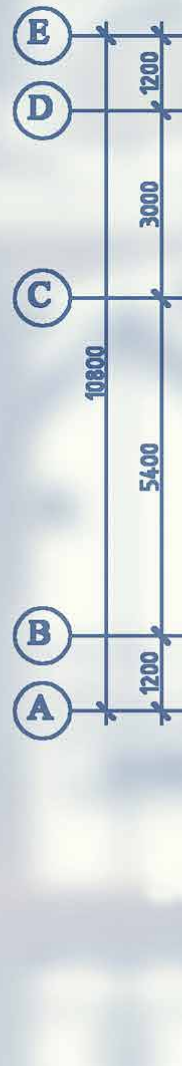




EUROPEAN CONSTRUCTION
INDUSTRY FEDERATION

metal
lathing
rafters
strainer

Section 1-1



2018

ANNUAL REPORT

Including reports of



APRIL 2018



FIEC

Created in 1905

International non-profit-making association
established under Belgian Law (aisbl BE 0688 919.140)

27 countries (24 EU , Switzerland, Norway and Turkey)

31 national Member Federations representing firms:

- of all sizes (from one person SMEs through to large firms)
- of all building and civil engineering specialities
- practising all kinds of working methods
(whether operating as general contractors or as sub-contractors)

Associate members:

EFFC European Federation of Foundation Contractors

EQAR European Quality Association for Recycling e.V.

Cooperation Agreement:

NFB National Federation of Builders (UK)

PARTNERSHIP



Social Partner in the European Sectoral Social Dialogue of the Construction Industry together with EFBWW (European Federation of Building and Woodworkers)
<http://ec.europa.eu/social/main.jsp?catId=480>



Cooperation with EIC (European International Contractors) for activities beyond Europe's borders
<http://www.eic-federation.eu>



The European founding member of CICA (Confederation of International Contractors' Associations)
www.cica.net



Participant in the ECF (European Construction Forum)
www.ecf.be



Member of EHF (European Housing Forum)
www.europeanhousingforum.eu



Partner Organisation of CEN (European Committee for Standardisation)
www.cen.eu



Member of ECCREDI (European Council for Construction Research, Development and Innovation)
www.eccredi.org



Associate Member of Euroskills Europe
www.euroskills.org



Member of the European Construction, built environment and energy efficient building Technology Platform
www.ECTP.org

CAMPAIGNS & PORTALS



Campaign "More EU budget for transport – the best Investment Plan for Europe"
www.moreeubudget4transport.org



Partner in the OSHA (European Agency for Health and Safety at Work) Campaign on "Healthy Workplaces for All Ages"
www.healthy-workplaces.eu



Partner of "BUILD UP" ("The European Portal for Energy Efficiency in Buildings")
www.buildup.eu

PROJECTS



FIEC-EFBWW website on "Posting of workers"
www.posting-workers.eu



FIEC-EFBWW website on "Construction for youth"
www.construction-for-youth.eu



Partner in the skills sector alliances for transfer of knowledge and skills of VET workforce in construction
www.skillco.eu

3.1

MILLION ENTERPRISES

95% are SMEs with fewer than 20 and 93% with fewer than 10 operatives

14.5

MILLION OPERATIVES

6.4%

OF EUROPE'S TOTAL EMPLOYMENT

29.3%

OF INDUSTRIAL EMPLOYMENT

43.6

MILLION WORKERS

in the EU depend, directly or indirectly,
on the construction sector*

Multiplier effect:
1 person working in the construction industry
=
2 further persons working in other sector*

* source: Communication from the Commission "The Competitiveness of the Construction Industry", COM(97) 539 of 4/11/1997, chapter 2

44.3%

OF GROSS FIXED CAPITAL FORMATION

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3

€1,364

BILLION

Total construction
in 2017 (EU28)

8.9%

OF GDP IN 2017 (EU 28)

PRESIDENT'S MESSAGE



It gives me great pleasure to present the new edition of the FIEC Annual Report at what is the end of my 2-year-term as FIEC President. The report gives an overview of FIEC's activities and position papers from the General Assembly 2017 in Stockholm to the General Assembly 2018 in Brussels. Continuing a long-standing tradition, our colleagues from the European International Contractors (EIC) and the Confederation of International Contractors' Associations (CICA) also report on their activities.

4

80%

“*80% of our national legislation is based on EU legislation! This figure indicates the importance of defending the construction industry's collective interests with competence and as early as possible in legislative procedures which deal with aspects that have an impact on our industry.*”

The European project is alive and has to be promoted!

Seeing the developments in other large regions of the world and the increasingly more visible impact on European business, infrastructure and citizens, it seems obvious that joining forces and developing joint strategies is the only realistic way for Europe to keep its way of life and societal values, as written in the European Constitution. This general statement is particularly true for the construction industry, where issues such as “Construction 4.0” and the increasing influence of China are part of a whole series of challenges.

My thanks

Let me take this opportunity to extend my thanks to everybody who, during my mandate, has participated actively or advised us in our work or with whom we have worked together on specific issues:

- my Steering Committee colleagues, the Presidents and members of our commissions, sub-commissions and working groups, all of them contractors or staff of our Member Federations,
- our social partner EFBWW (European Federation of Building and Woodworkers)
- our contacts in the European Parliament, the European Commission, the Council Presidency and the European Economic and Social Committee
- our colleagues participating in the European Construction Forum, ECF
- our FIEC Team in Brussels, led by our Director General Ulrich Paetzold.

Your opinion counts for us!

We look forward to receiving your comments or questions on the issues addressed in this Annual Report or any other construction industry topic, so please do not hesitate to contact us. We will respond to the best of our knowledge. In addition, our website www.fiec.eu and our weekly newsletter "Construction matters" provide a wealth of information and all our position papers.

Jean-Louis Marchand
President of FIEC



FIEC General Assembly in Paris, 1/12/2017



© Photos Harald Gottschalk

FIEC Honorary Presidency awarded to Johan Willemen by President Jean-Louis Marchand



© Photos Harald Gottschalk

From left to right :
Ulrich Paetzold, Johan Willemen, Jean-Louis Marchand, Kjetil Tønning



© Photos Harald Gottschalk

Representatives of our Member Federations attending the FIEC General Assembly in Paris on 1st December 2017, hosted by the FFB (Fédération Française du Bâtiment)

FIEC STEERING COMMITTEE 2016-2018

Jean-Louis Marchand, FR
President



Thomas Bauer, DE
Vice-President
ECO
(DE)



Maxime Verhagen, NL
Vice-President
SOC
(BE-LU-NL)

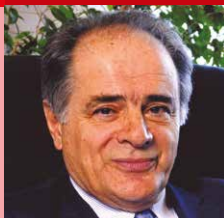


Kjetil Tonning, NO
President Elect
TEC
(DK-EE-FI-LT-NO-SE)



Alexander Pongratz, AT
Vice-President
Treasurer
(AT-CH-HR-HU-SI-SK)

Giuseppe Cafiero, IT
Vice-President
Competitiveness
(IT)



Michail Daktylidis, GR
Vice-President
ECF
(BG-CY-GR-RO)



María Ángeles Asenjo, ES
Vice-President
MEDA
(ES)



Daniel Nicolardot, FR
Vice-President
SME
(FR)



Emre Aykar, TR
Vice-President
CICA
(TR)



Philippe Dessoy, BE
Vice-President
EIC President



Philip Crampton, IE
Vice-President
Communication
(PT-IE)



FIEC ORGANISATION CHART 2016-2018

GENERAL ASSEMBLY

Steering Committee

Economic and Legal Commission (ECO)

President:
Thomas Bauer, DE
Rapporteur:
Christine Le Forestier, FIEC

Working Group

Infrastructure & Financing
Chairman: Jean François Ravix, FR

Temporary Working Groups

EU Contract Law
Chairman: Wolfgang Bayer, DE

Public Procurement
Chairman: Jan Wierenga, NL

Social Commission (SOC)

President:
Maxime Verhagen, NL
Rapporteur:
Domenico Campogrande, FIEC

SOC-1:

Vocational Training
Co-Chairman: Massimo Calzoni, IT +
Co-Chairman: Jakob Krohn-Rasmussen, DK

SOC-2:

Health and Safety
Chairman:
Cristina García Herguedas, ES

SOC-3:

Economic and Social Aspects of Employment
Chairman: Michel Gili, FR

Technical Commission (TEC)

President:
Kjetil Tønning, NO
Rapporteur:
Sue Arundale, FIEC

TEC-1:

Directives, Standards and Quality Assurance
Chairman: Jan Coumans, BE

TEC-2:

Research, Development and Innovation
Chairman: Claude Dumoulin, FR

TEC-3:

Environment
Chairman: Lennart Henriz, SE

Competitiveness

Chairman: Giuseppe Cafiero, IT
Rapporteur: Ulrich Paetzold, FIEC

WG "Construction 4.0"

Chairman: Kjetil Tønning, NO
Rapporteur: Sue Arundale, FIEC

WG "Housing"

Chairman: José Michaël Chenu, FR
Rapporteur: Myriam Diallo, FR

EIC – European International Contractors e.V.
President: Philippe Dessoy, BE
Director: Frank Kehlenbach, EIC

CICA – Confederation of International Contractors' Associations
President: Jorge Mas, CL
Director General: Roger Fiszelson, CICA (-12/2017)
Fanny Dastugue, CICA (01/2018-)

FIEC STEERING COMMITTEE 2018-2020

Kjetil Tønning, NO
President



Thomas Bauer, DE
Vice-President
ECO
(DE)



Paul Depreter, BE
Vice-President
SOC
(BE-LU-NL)



José Michaël Chenu, FR
Vice-President
TEC
(FR)



Alexander Pongratz, AT
Vice-President
Treasurer
(AT-CH)



Stefano De Marinis, IT
Vice-President
Competitiveness
(IT)



Michail Daktylidis, GR
Vice-President
ECF
(CY-GR)



María Ángeles Asenjo, ES
Vice-President
MEDA
(ES)



Lars M. Carlsen, DK
Vice-President
(DK, FI, NO, SE)



Philip Crampton, IE
Vice-President
Communication
(PT-IE)



Lubomir Katchamakov, BG
Vice-President
SME
(BG, CZ, EE, HU, HR, LT, RO, SI, SK)



Emre Aykar, TR
Vice-President
CICA
(TR)



Philippe Dessoy, BE
Vice-President
EIC President



FIEC ORGANISATION CHART 2018-2020

GENERAL ASSEMBLY

Steering Committee

Economic and Legal Commission (ECO)

President:
Thomas Bauer, DE
Rapporteur:
Christine Le Forestier, FIEC

Working Group

Infrastructure & Financing

Temporary Working Groups

EU Contract Law
Public Procurement

Social Commission (SOC)

President:
Paul Depreter, BE
Rapporteur:
Domenico Campogrande, FIEC

SOC-1:
Vocational Training

SOC-2:
Health and Safety

SOC-3:
Economic and Social
Aspects of Employment

Technical Commission (TEC)

President:
José Michaël Chenu, FR
Rapporteur:
Sue Arundale, FIEC

TEC-1:
Directives, Standards
and Quality Assurance

TEC-2:
Research, Development
and Innovation

TEC-3:
Environment

Competitiveness

Chairman: Stefano De Marinis, IT

Joint FIEC/ EIC WG "China Challenge"

Chairman: N.N.

WG "Construction 4.0"

Chairman: Žiga Turk, SI

WG "Housing"

Chairman: N.N.

EIC – European International Contractors e.V.

President: Philippe Dessoy, BE
Director: Frank Kehlenbach, EIC

CICA – Confederation of International Contractors' Associations

President: Jorge Mas, CL
Director General: Fanny Dastugue, CICA

FIEC TEAM

Ulrich Paetzold
Director General



Christine Le Forestier
Director Economic & Legal Affairs (ECO)



Domenico Campogrande
Director Social Affairs (SOC)



Sue Arundale
Director Technical Affairs (TEC)



Yasmina Koeune
Assistant



Joëlle Caucheteur
Assistant



Sylvie Masula
Assistant



Muriel Lambelé
Accountant



10

The Secretariat has a double responsibility: internally towards its member federations, and externally towards the European Institutions and other organisations both at the European and world levels. With the objective of defending and promoting the interests of enterprises in the construction sector. **So far as this "internal" role is concerned,** in the first instance it ensures the coordination and the proper functioning of internal bodies of the federation (General Assembly, Steering Committee, Commissions, Sub-commissions and working groups etc.) and on the other, ensures communications with the member federations which includes consulting them on all actions undertaken towards the European Institutions, directly or indirectly of concern to the construction sector.

As concerns its external role, this involves on the one hand representing the sector in its debates with the European Institutions, from the first consultative phases, ensuring the follow-up and proposing initiatives, through to individual specific actions of the organisations such as seminars and conferences. At the same time, the Secretariat takes care of the coordination of contacts and other actions with other organisations such as EIC (European International Contractors) and CICA (Confederation of International Contractors Associations).

FIEC CONGRESS 2017 – STOCKHOLM

Conference 9/6/2017

“Construction Single Market based on Respect of Law, Corporate Responsibility and Fair Competition”

The topic addressed in the Conference of Stockholm was not an easy one: how to ensure the right balance between the opening of the European Internal Market on the one hand and those rules and tools aimed at ensuring a level playing field for companies and the respect of workers' rights on the other.

We have encountered difficulties in reaching such a balance, in particular when the cross-border dimension is taken into account.

But we have to be realistic: we need such mobility. Our companies need it firstly to enable them to access new markets and, secondly, to find the right workers with the right skills. Today we are facing a paradox in which in several countries, in particular here in Northern Europe, companies cannot find workers with the right skills. At the same time, in other parts of Europe, the levels of unemployment remain dramatically high, in particular amongst young people.

We are aware that such mobility can also inadvertently encourage fraud and abuse. Construction is a sector with circumstances which do not facilitate control and inspection by relevant authorities. In many countries, these authorities lack resources and the exchange of data/information between countries is still very poor. There are loopholes and ambiguity in the existing legislation. This situation is affecting our industry, the genuine companies, our workers, our socio-economic models and our welfare systems. In other words it is affecting our competitiveness and our future.

For these reasons we thought that it was important to have an open internal discussion on these sensitive issues and also discussions with other relevant stakeholders.

With this conference our intention was to highlight what has been done so far, to exchange views on how some countries are addressing the issue and to consider possible ways forward.

Our Swedish hosts showed us that solutions that go beyond the national borders can be put in place to ensure a level playing field. We also saw that there are different possible levels of intervention and that the social partners can work effectively together, as well as in cooperation with public authorities.

As far as FIEC is concerned we will continue the discussions on the way forward with our members, our social partner, the EFBWW, as also the other stakeholders concerned, in particular the EU institutions and the national authorities. As we have always done, we will endeavour to develop pragmatic initiatives. It is our duty if we want to ensure the sustainability of our industry, as well as of our national economies.

Amongst the Keynote Speakers :
Ylva Johansson, Swedish Minister for Employment and Integration



From left to right: Mats Akerlind (Sveriges Byggindustrier) - Jean-Louis Marchand - Ylva Johansson - Sam Hagglund (EFBWW) - Svante Hagman (Sveriges Byggindustrier)

Ensuring mobility and a level playing field in the Internal Market: key challenges for the sustainability of the construction industry

“Ensuring the right balance between the opening of the EU Internal Market and those rules and tools aimed at ensuring a level playing field for companies and the respect of workers’ rights are key challenges for the long term sustainability of the construction industry” declared FIEC President, Jean-Louis Marchand, during the 2017 FIEC conference in Stockholm.

“Several Member States are still facing dramatically high unemployment rates, in particular amongst young people, whilst at the same time in others, companies cannot find workers with the right skills. We need mobility within the EU, but not at any price.” added Jean-Louis Marchand.

The construction industry is confronted with fraud and abuse, caused by, amongst other things, difficulties in controlling cross-border situations, due to a lack of data exchange between Member States and loopholes in the existing legislation. This situation is affecting genuine companies, in particular SMEs, workers, as well as our socio-economic models and our welfare systems.

The various stakeholders (contractors, workers, public authorities, inspection authorities,...) from all over the EU presented and exchanged their views on the tools that have been put in place, or that are being envisaged, both at EU and national level, to ensure a level playing field.

Particular attention was given to the “Social ID cards” that have been introduced in various Member States (Belgium, France, Finland, Luxembourg, Sweden,...) in order to ensure transparency and facilitate controls on construction worksites.

“It is in our interest and it is our duty to continue to cooperate with our Social Partner, the EFBWW, and with the EU and national authorities, in order to ensure that the tools and measures put in place adequately take into account the circumstances of our industry” concluded Jean-Louis Marchand.¹

¹ From FIEC Press Release of 9/6/2017

1st Panel discussion : “Combining EU freedoms and fair competition – the main challenges”



2nd Panel discussion : “Examples of national measures for tackling these challenges”

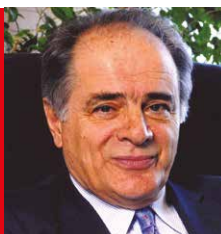


From left to right: Domenico Campogrande (FIEC) and the Keynote Speakers opening the Conference : Jackie Morin (EU Commission) - Jean-Louis Marchand (FIEC President) - Bruno Gabellieri (AEIP)

COMPETITIVENESS

Giuseppe Cafiero, IT
President

Ulrich Paetzold, FIEC
Rapporteur



“Construction 2020” with new direction and actions

Following Commission Vice-President Tajani's preview at the FIEC Congress 2012 in Istanbul, some of the initiatives addressed in the High-Level Forum (HLF) continued in the Thematic Groups (TG) and with external consultants. Ideas on how to adapt to the needs of future challenges were discussed in the conference “Let's build changes!” on 6/7/2017 and the HLF meeting on 18/1/2018. This chapter uses extracts of the documents and reports presented during the above meeting.

A) Conference “Let's build changes!”, 6/7/2017¹

Based on the statement that “it is important to keep on top of the latest challenges and potential solutions to ensure the industry's value chain can meet the demands of the future”, the discussions addressed the following items:

- **Where is the sector heading?**
Trends, new challenges and opportunities, societal changes, etc.
- **What are the strategies and responses to tomorrow's requirements?**
Ways the sector (and the whole value chain) can adapt and modernise to remain competitive and resilient.
- **What is the role of the public sector?**
Identifying the best ways the public sector can help and support the transition of the construction sector.

13

Construction 2020 - 6th Meeting of the High Level Tripartite Strategic Forum of 18/1/2018 (Brussels – EU Commission)



Among the participants for DG GROW: Lowri Evans (Director General), Gwenole Cozigou (Director), Fulvia Raffaelli (Head of Unit)

¹ https://ec.europa.eu/growth/content/2017-construction-conference-lets-build-changes_en

The discussions took place in special sessions on four key areas:

- Using construction to reshape our cities
- Sustainability - resource efficiency and beyond
- Innovation and digitalisation and their impact on business models
- Skills – a capable workforce to deliver transformational change

From these discussions, the Commission summarised some key messages:

- the necessity of designing a better built environment, which is smart, sustainable, energy efficient, welcoming and based on partnerships between all.
- Public authorities need to provide clear messages about long-term goals and the timeframe for the construction sector to respond.
- the importance of building a more resilient construction sector, which embraces innovation, new technologies, new business models; and which can raise its productivity.
- To achieve this, capacity needs to be strengthened across the construction value chain in urban planning, IT, construction and finance, amongst other things.
- Finally, construction is a key enabler for reaching other policy goals related to sustainability, energy, digitalisation, employment, urban environment etc.

B) From the HLF meeting, 18/1/2018

The forum was organised around two sessions, one on “Accelerating Sustainable Construction practices” and the other one on “Looking for synergies with other initiatives”.

The first session dealt with

- the results of the conference held on 6/7/2017 (see above),
- circular economy in construction (addressed by Thematic Group 3),
- digitalisation of the construction sector (addressed by Thematic Group 1), in particular the need for a European digital platform for construction. A call for proposals will be opened later this year.

The second session dealt with some European initiatives, in particular the potential synergy between:

- Clean Energy Industrial Forum
- EU Covenant of Mayors
- Sustainable Energy Investment Forums

From the lively discussions, the European Commission noted in particular:

- The various initiatives presented could serve as examples for more specifically

construction-oriented contributions.

- A European initiative for a digital platform for construction should take into account existing national initiatives in order to avoid incompatible developments and subsequent splitting of markets.
- A “people-first” approach should be chosen, which makes it necessary to work at national and regional levels, at the same time as focusing on realistic targets of fundamental importance for the sector.
- “Nearly zero energy buildings” should be changed to “nearly zero problem buildings”.

In conclusion, Mrs. Lowri Evans, the Director General of DG GROW, stressed issues such as:

- Construction 2020 has achieved a lot, but more has to be done in view of the numerous challenges. It raised the awareness of what the construction sector can deliver and how complex it is.
- Initiatives, such as the EU Construction and Demolition Waste Protocol, the Design for Deconstruction initiative, the Fire Information Exchange Platform and the future Digital Platform for Construction are examples of successful work.
- An important aspect is the strengthening of the skills base of the sector, to which the New Skills Agenda, with a call for proposals for a “Blueprint for Sectoral Cooperation on Skills” will contribute considerably.
- The **DG GROW European Industry Days** will provide an opportunity to reach out to other sectors and stakeholders and promote the image of the sector, as well to drive forward the policy debate.

C) FIEC, together with its Member Federations and partner organisations

- actively contributed to the **DG GROW Conference “Let’s build changes!”**
- actively contributed to the work of the **High Level Forum and the Thematic Groups**
- actively participated in the “European Industry Day”, with the support and participation of DG GROW and DG CNECT: **“Construction – Towards an Inclusive Digital Strategy”**
- actively participated in the preparation of the proposal for the “Blueprint” mentioned above

"CONSTRUCTION 4.0" WORKING GROUP

Kjetil Tønning, NO
Chairman

Sue Arundale, FIEC
Rapporteur



CONSTRUCTION 4.0 WORKING GROUP - PRIORITY TOPICS

(Non-exhaustive and in no particular order)

1. Legal aspects of BIM
2. New business models
3. Prefabrication
4. Cybersecurity
5. Artificial Intelligence
6. Robotisation
7. Research and innovation
8. Skills and education

FIEC, Construction 4.0 and BIM¹

I. Construction 4.0 Working Group created from BIM Working Group

Following a very active year, the BIM Working Group widened its scope to cover all aspects of digital construction. The wider term Industry 4.0 - the "fourth industrial revolution" - is applied to construction as "Construction 4.0". A full explanation can be found on [FIEC's website](#), but in brief it includes automation and robotisation, Artificial Intelligence and machine learning, prefabrication, digital processes and new business models. Massive changes are occurring as a result of the possibilities created by big data and the Internet of Things and the transformation is well underway, although different countries and companies are going at different speeds, which creates some challenges. Indeed, a successful digital construction revolution depends on everyone being connected. Furthermore, collaboration is the new buzzword and fragmentation, for which the industry is frequently criticised, is an obstacle to progress, which has to disappear.

II. Collaboration with other stakeholders

Reflecting the need for collaboration in the industry in order to make digital construction a reality, FIEC initiated many meetings with other stakeholders, mainly construction federations and was invited to speak at an event hosted by the Committee for European Construction Equipment (CECE). FIEC hosted an open meeting in January 2018 on Construction 4.0 for the main construction federations and started work on a joint document, to be published later in 2018.

¹ Building Information Modelling, Management, or Model depending on context.

III. EU Industry Day 22-23 February 2018

The European Commission hosted a full programme of events during its two-day European Industry Day 2018. With financial and logistics support and an array of key speakers from relevant units in the Commission, the event welcomed hundreds of guests from across the EU and provided an entertaining and informative series of workshops. For construction, the European Commission supported an event which was co-hosted with the federations CECE, FIEC, EBC and Construction Products Europe. Construction – towards an inclusive digital strategy focused on the digital transformation of the industry. Fulvia Raffaelli, Head of Unit DG GROW, Clean Technologies and Products, talked about the many digital tools that are being increasingly used in construction, such as drones, 3D printers and scanners. She emphasised the opportunity for companies and the commitment of the Commission to support the industry through the transformation. Max Lemke, Head of Unit DG CONNECT, Technologies and Systems for Digitising Industry, announced an EU strategy for Artificial Intelligence, which is expected later this year. He also announced welcome financial support for the development of an EU data platform for digital construction, with follow up funding expected in the next EU term post-2019.

European Industry Day 2018 “Construction – Towards an Inclusive Digital Strategy” Brussels (Covent Garden) 22/2/2018



Opening Speech by Emil KARANIKOLOV, Minister of Economy, Republic of Bulgaria



Panel discussion between the Stakeholders
From left to right: Cédric de MEËUS (LafargeHolcim, Construction Products Europe), Maria RIBEIRINHO (Moderator, McKinsey), Kjetil TONNING (FIEC President Elect), Enrico PRANDINI (CECE President) and Philip VAN NIEUWENHUIZEN (EBC)

JOINT FIEC/EIC ACTIONS



Complementarity: FIEC and EIC joining force and sharing expertise

For some years, the importance of international issues also having a direct impact on the EU Internal Market has increased. Considering that the international interests of FIEC Member Federations and their contractor members are defended by FIEC's sister organisation «European International Contractors» (EIC), combining forces, expertise and efforts of both federations is the most efficient way forward. EIC's statutory international activities are outlined in the EIC chapter starting on page 38.

A) Third country state-owned enterprises (SOE) in the EU Internal Market

The access of third country SOE to EU public procurement markets has become an active issue again. Over several years, China developed an overarching strategy covering business, transport, science, education and society in the whole world. On the one hand, there is an increasing number of company purchases and construction projects. On the other hand, there are large scale exercises such as "OBOR" (One Belt One Road) or the meetings in the framework of "16 + 1" in which bilateral relations with China are being fostered. The economic crisis, public debts and the budgetary discipline required from EU Member States have increased the likelihood that contracting authorities take into consideration and sometimes actively seek combined financing and construction contracts offered by China and its SOE. The reference to China is not due to what is called "China bashing", but simply to the current reality.

Example 1: Become top ranking construction company in the UK

In December 2015, the CEO of the Beijing Construction Engineering Group International (BCEGI) announced that he wanted his company to be among the top 20 contractors in the UK within 5 years.

Fair competition on open markets

In order to avoid any misunderstanding, FIEC and EIC would like to reiterate that they are firmly opposed to any form of protectionism and are in favour of fair competition in mutually open markets. Fair and healthy competition, based on contract conditions which allocate risks in a balanced way, contributes to progress and innovation. On the other hand, unfair and unhealthy competition, based on unbalanced conditions and the lowest price only, endangers the EU economy and society.

FIEC and EIC are in favour of genuinely reciprocal market access opportunities and corresponding incentive measures (i.e. trade defence instruments) at EU level, if international negotiations do not achieve tangible progress.

Example 2: Croatia, bridge Pelješac (2,4 km, EU financing 357 million €)¹

This project has already been awarded to a consortium of 4 Chinese SOEs. Their offer was 35% cheaper than that of the next consortium, led by a European contractor. Two competing European consortia appealed against this award decision. At the time of writing this report, we do not know the outcome of these procedures.

Example 3: Hungary, train Budapest-Serbian border²

This case is full of strange elements, including Chinese experts assisting in the formulation of the tender, unusually tight time schedule for submitting tenders, qualification references favouring companies having built long stretches of railway tracks but not having any experience with the required EU signalisation technology. On top, the special purpose vehicle of Hungarian law, called “Chinese-Hungarian Railway Nonprofit Ltd.”, reserves the right to cancel the tender without compensation, should the financing not be secured. In this specific case, with financing from China, this means that the risk of arbitrary cancellation is difficult to accommodate by non-Chinese contractors.

Example 4: Tunnel between Denmark and Sweden

For this tunnel between Helsingør (DK) and Helsingborg (S), the China Railway Tunnel Group (CRTG), subsidiary of the China Railway Group, proposed to finance the total cost, estimated at 2,7 – 3,2 billion €. The local authorities are reported to be excited about the prospect of further integrating business and labour markets. For the time being, it is not known whether this offer will be accepted.

Example 5: “16 + 1” and the “Budapest Guidelines”³

This “16 + 1” group consists of China (“+1”), 11 EU Central and Eastern European and 5 Western Balkan Countries, as well as observers, such as Austria, Greece, Switzerland, Belarus, the EBRD and the EU. The “Budapest Guidelines” contain a multitude of planned initiatives and commitments in 9 chapters with potential impact on all sectors of industry. In particular chapters “4. Connectivity” and “6. Financial cooperation” concern the construction industry.

Conclusion

It will be crucial to ensure that Chinese SOEs working in the EU respect both the letter and the spirit of EU law, such as posting of workers or state aid rules, as well as fundamental principles of the EU constitution. This requires the EU to develop clear positions for the defence of its interests, in order to be prepared for negotiations and situations in which other global players in world-wide trade will defend their interests vigorously.

B) Real “reciprocity” in market access

For example, the EU should apply the principle of real reciprocity in law and facts vis-à-vis Chinese construction SOEs until China has either become a member of the WTO Government Procurement Agreement (GPA) or otherwise opened its construction markets to European contractors to the same degree that the EU construction market is open to GPA members. Presently there is an imbalance: Chinese construction SOEs can enter the EU Internal Market freely, European contractors can only enter Chinese construction markets by establishing Sino-European Joint Ventures or “Wholly foreign Owned Companies” the scope of operation of which is limited mainly to foreign or internationally financed projects.

1 <http://ted.europa.eu/udl?uri=TED:NOTICE:213319-2016:TEXT:EN:HTML&tabId=0>

2 <http://ted.europa.eu/udl?uri=TED:NOTICE:475836-2017:DATA:EN:HTML&tabId=3>

3 http://www.fmprc.gov.cn/mfa_eng/zxxx_662805/t1514534.shtml

ECONOMIC AND LEGAL COMMISSION (ECO)

Thomas Bauer, DE
President

Christine Le Forestier, FIEC
Rapporteur



WORKING GROUP "INFRASTRUCTURE & FINANCING":

Jean-François Ravix, FR
Chairman

Nicolas Gaubert, FR
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Vincent Piron, FR
Vice-Chairman



Daniel Boscari, FR
Vice-Chairman

TEMPORARY WORKING GROUPS:

PUBLIC PROCUREMENT

Jan Wierenga, NL
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Dick Van Werven, NL
Rapporteur



EU CONTRACT LAW

Wolfgang Bayer, DE
Chairman

Christine Vöhringer-Gampper, DE
Rapporteur



A) Internal Market

I. The European services e-card

In January 2017, the European Commission presented a legislative package, the "Services Package", aimed at simplifying the administrative burden for companies involved in cross-border services provision.

FIEC concentrated on the proposal for a "European services e-card". The e-card would contain information about the establishment of the company in its home Member State and grant access to the market of the target host Member State.

However, some elements in the proposal raised major concerns.

- The construction industry is a very local business, composed of mainly very small companies. This is not taken into account.

- The proposal would bring very little added-value to contractors in terms of administrative simplification.
- The administrative mechanism proposed (based on the Internal Market Information system – IMI) is not suitable.
- The principle of “tacit approval” by the host Member State and the indefinite validity of the e-card, would lead to unfair competition between e-card holders and other companies.
- Finally, the fact that fraud is unfortunately frequent in the construction industry has been ignored.

In a position paper dated 29/05/2017, FIEC raised all these concerns and called for the exclusion of the construction sector from the scope of the proposal.

Joint lobbying was also undertaken with the construction trade unions (EFBWW), as well as the social partners of the cleaning and insurance industries. A joint public hearing was organised on 8/9/2017 and attended by a number of representatives from the Council and the European Parliament. In the latter, several committees have already requested the rejection of this proposal, but Parliamentarians remain divided within the leading committee. In the Council, Member States are expressing doubts about the added-value of the whole system.

II. The Single Market Information Tool (SMIT)

In May 2017, the European Commission presented a legislative package entitled “Compliance and practical functioning of the EU Single Market”, aimed at improving the Single Market.

FIEC concentrated on the proposal for a “Single Market Information Tool” (SMIT)¹.

With this proposed legislation, the European Commission would be allowed to request potentially sensitive information (e.g. cost structure, pricing policy, product volumes sold, etc.) directly from companies in the areas of the Internal Market, transport, environment and energy.

The targeted companies would be obliged to provide the requested information within a certain time limit, or else face potentially heavy fines.

¹ Regulation setting out the conditions and procedure by which the Commission may request undertakings and associations of undertakings to provide information in relation to the Internal Market and related areas

In a position paper dated 20/11/2017, FIEC advocated that the proposed Regulation should be significantly amended – cooperation on a voluntary basis only, no obligation to provide confidential information and no sanctions or fines – or otherwise fully rejected.

In the Council, the legal service has rejected the legal basis of the SMIT proposal, which was inspired by DG COMPETITION’s practices in competition, mergers and State aid matters. In the European Parliament, a legal opinion has been requested and the Liberals (ALDE) have already expressed their opposition to the proposal.

III. Public procurement

1. Follow-up of the implementation of the 2014 directives

Member States had until April 2016 to implement the 2014 directives on public procurement², except for e-procurement rules, the transposition of which can be postponed until October 2018.

The implementation process is slowly coming to an end, but a number of Member Federations have problems related to interpretation at national level.

Therefore, FIEC continues to follow the process and is assisting its Member Federations as required, in particular through contacts with the European Commission.

The **Commission’s Experts’ group on Electronic Procurement (EXEP)** helps national administrations to make the transition towards electronic procurement. In 2017, the EXEP developed guidance on contract registers, e-catalogues, and the accreditation of electronic procurement platforms. As FIEC’s representative, Mrs. Sabine Ayraud (FR-FNTP) gives FIEC great visibility.

2. The 2017 public procurement package

In October 2017, the European Commission presented a new package of public procurement measures, which are expected to reinforce and help the implementation of the 2014 public procurement directives. It is composed of:

- A general Communication “Making public procurement work in and for Europe”,

² i.e. directives 2014/23/EU, 2014/24/EU and 2014/25/EU



Stakeholders' practical hearing on the European services e-card (8/9/2017, Brussels)
Intervention by Vincent Detemmerman, Director Administration and International at the Belgian Confédération Construction

- An ex-ante assessment mechanism for the procurement of large infrastructure projects,
- Guidance on professionalisation of public buyers,
- A public consultation on draft guidance on public procurement of innovation.

FIEC broadly welcomed these measures, especially the professionalisation of public buyers, but was more sceptical about the strong promotion of what is now called "strategic procurement" (i.e including innovative, green and social / societal criteria). These latter criteria are not very clearly defined and sometimes diverge significantly from the traditional principle of purchasing for the best value for money.

As regards the ex-ante assessment mechanism, it is composed of a helpdesk, a voluntary notification mechanism – the result of which is non-binding, as well as an information database and a platform for peer-to-peer discussions. The scheme corresponds to FIEC's response to the relevant public consultation.

As regards the consultation on innovation, FIEC pointed out in its contribution dated 21/12/2017 that the main obstacle to innovation, in spite of options provided by the directives (e.g. variants), is the risk-aversion of public buyers.

B) Infrastructure & Financing

I. The Investment Plan for Europe ("Juncker Plan")

Back in 2014, President Juncker launched an ambitious investment plan aimed at boosting the EU's growth and jobs in the aftermath of the economic and financial crisis. It includes:

- a European Fund for Strategic Investments (EFSI),
- a European Investment Advisory Hub (EIAH) for projects,
- a European Investment Projects Portal (EIPP),
- a more business-friendly legal environment.

The extension of the European Fund for Strategic Investment – "EFSI 2.0":

Following evaluation, and in spite of some criticism, in September 2016 President Juncker proposed increasing the investment plan to at least €500 billion by 2020. After a long and chaotic legislative process, the "EFSI 2.0" was finally adopted in December 2017.

FIEC welcomed this continuity as a very positive sign for private investors and project promoters. Furthermore, construction companies need a stable investment strategy to fully play their role in the economy. However, FIEC regretted that, until now, only 9% of EFSI projects are transport infrastructure projects, while the dedicated EU budget – Connecting Europe Facility –

contributed significantly to the EFSI guarantee.

In parallel, FIEC kept promoting **the European Investment Projects Portal (EIPP)**. Indeed, increasing the visibility of projects seeking financing by private investors is extremely important. In particular, FIEC President Jean-Louis Marchand stated at several public events that this portal cannot fully succeed under centralised management by the European Commission. Regional and local authorities should be able to use this tool in order to directly advertise their projects.

II. The Connecting Europe Facility (CEF)

The Connecting Europe Facility (CEF) is a specific instrument for transport, energy and telecommunication infrastructure³. It has a budget of €29.9 billion for the period 2014-2020:

- €23.1 billion (including €10 billion from the Cohesion Fund) for transport,
- €5.1 billion for energy,
- €1 billion for telecommunication.

In September 2017, the European Commission presented the mid-term results of the CEF, which show that the various calls for projects organised since 2014 have all been very successful. The main question now is whether this budget line will be safeguarded in the EU budget post-2020.

In order to be more vocal on this issue, in October 2017, FIEC joined the campaign “More EU budget for transport – the best Investment Plan”, launched by associations from the transport sector.

Commission’s public consultation on “streamlining the implementation of the Trans-European Transport Network (TEN-T)”:

The Commission also wishes to simplify the complex permitting, administrative and procurement procedures for TEN-T core network projects, which contribute to increased costs, delay and uncertainty.

In its contribution to the public consultation, dated 9/11/2017, FIEC called for more coherent rules and better coordinated procedures, especially for permitting, public procurement or State aid.

III. The “Mobility Package”

In May 2017, the European Commission presented a “Mobility Package”, composed of legislative proposals on road transport.

1. Revision of the “Eurovignette” Directive

One proposal is to revise the “Eurovignette” Directive, which allows Member States to levy infrastructure and “external” charges on their road network and encourage them to earmark these funds for “sustainable transport”.

In a position paper dated 27/11/2017 – in the spirit of the legislative proposal – FIEC called for the reinforcement of the “user pays” and “polluter pays” principles. Most importantly, FIEC insisted that Member States earmark the revenues generated for sustainable transport infrastructure, which for now, remains only an option.

While the leading committee in the European Parliament seems to support this latter idea, Member States in the Council always tend to protect their freedom of budget administration.

2. Revision of the “driving times” and “tachograph” Regulations

Another proposal is to revise the rules on certain social aspects in road transport (i.e. driving times and rests), linked to the use of (digital) tachographs on board.

In principle, such burdensome and costly rules do not apply to construction companies’ drivers and light trucks⁴.

However, in some countries, the legislation is applied more extensively and includes “construction drivers”, as though they belong to the transport industry.

In a position paper dated 20/11/2017, FIEC called for a further extension of the existing derogations, because construction companies are small mobile factories covering a limited perimeter. In specific cases, they also transport perishable goods (i.e. ready-mixed concrete), which can clearly not be treated as “normal” merchandise.

Discussions have just started but neither the European Parliament nor the Council seem to be enthusiastic about a debate on exemptions and derogations.

³ Established by Regulation (EU) n°1316/2013 dated 11/12/2013

⁴ In 2014 FIEC already obtained an extension to the exemption for “carrying materials, equipment or machinery” from a 50km to a 100km radius.

Here are a few examples of what the Economic and Legal Commission has published and delivered over the past year:

Position Papers

FIEC position on the proposal for a Directive amending Directive 1999/62/EC on the charging of heavy goods vehicles for the use of certain infrastructure ("Eurovignette") (27/11/2017)

FIEC position on the proposal for a Regulation amending the "driving times" (EC/561/2006) and the "tachograph" (EU/165/2014) Regulations (20/11/2017)

FIEC position on the proposal for a Regulation setting out the conditions and procedure by which the Commission may request undertakings and associations of undertakings to provide information in relation to the internal market and related areas ("Single Market Information Tool") (20/11/2017)

FIEC position on the European services e-card (29/5/2017)

Joint position – Employers and trade unions criticize fundamentally flawed European Commission's proposals for a European services e-card (10/5/2017)

Press Releases

FIEC press release – FIEC welcomes the extension and reinforcement of the Investment Plan for Europe (14/12/2017)

FIEC press release – FIEC joins campaign "More EU budget for transport – the best Investment Plan for Europe" (20/10/2017)

Joint press release – Services e-card: Commission's ill-conceived e-card threatens certain services sectors (8/9/2017)

FIEC press release – Publication of FIEC annual statistical report: construction industry continues its slow recovery process (9/6/2017)

FIEC press release – Revision of the Eurovignette Directive: in the right direction but not far enough (7/6/2017)

FIEC press release – FIEC asks the European legislators to exclude construction from the European services e-card (30/5/2017)

Joint press release – Employers and workers jointly criticise fundamentally flawed proposals for a European services e-card (10/5/2017)

Answers to public consultations

FIEC contribution to the European Commission public consultation on the draft guidance on public procurement of innovation (21/12/2017)

FIEC contribution to the European Commission public consultation on streamlining the implementation of the Trans-European Transport Network (TEN-T) (9/11/2017)

FIEC contribution to the European Commission public consultation on the setting up of a voluntary ex-ante assessment for large-scale infrastructure (10/4/2017)

Intervention in public events

Speech by J.L. Marchand, FIEC President, at the 3rd European Engineers' Day – "Challenges and perspectives of the construction industry in Europe" (5/10/2017, Vienna)

Intervention by V. Detemmerman, Director Administration and International at the Belgian Confédération Construction, at the stakeholders' practical hearing on the European services e-card (8/9/2017, Brussels)

Speech by K. Tønning, FIEC Vice-President, at the Bulgarian Construction Chamber conference on the financing of the construction sector – "Challenges and perspectives of the construction industry in Europe" (20/7/2017, Sofia)

Speech by C. Le Forestier, Director Economic and Legal affairs, at the Construction Insurance Forum on the European services e-card (6/7/2017, Paris)

Speech by U. Paetzold, FIEC Director General, in the European Parliament's IMCO Hearing on the European services e-card (21/6/2017, Brussels)

Intervention by U. Paetzold, FIEC Director General, in the Commission's Single Market Forum – "Barriers on the Single Market" (19/6/2017, Malta)

Presentation by C. Le Forestier, Director Economic and Legal affairs, to the European Committee of the Regions – "EIPP helping regions and cities to successfully promote their projects" (30/5/2017, Brussels)

Opening by J.L. Marchand, FIEC President, of the MEDEF workshop on the European Investment Projects Portal (EIPP) (5/4/2017, Brussels)

All these documents are available on the FIEC website www.fiec.eu

SOCIAL COMMISSION (SOC)

Maxime Verhagen, NL
President

Domenico Campogrande, FIEC
Rapporteur



SUB-COMMISSION SOC-1

SUB-COMMISSION SOC-2

SUB-COMMISSION SOC-3

“VOCATIONAL TRAINING”

“HEALTH AND SAFETY”

“EMPLOYMENT”

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Massimo Calzoni, IT +
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Rossella Martino, IT
Co-Rapporteur



Cristina García Herguedas, ES
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Ricardo Cortés, ES
Rapporteur



Michel Gili, FR
Chairman

Eva Blouin, FR
Rapporteur



Jakob Krohn-Rasmussen, DK
Co-Chairman

A) Education, training, youth employment: assets for the future

I. Addressing skills gaps and mismatches: key priorities

In a fast-changing global economy, skills development and adaptation play a key role in our industry's competitiveness and capacity to innovate and in attracting investment and stimulating job creation and growth. However, in many Member States employers report that they cannot find people with the required skills.

Tackling skills gaps and mismatches requires significant policy efforts and systemic adaptation of existing education and training systems. These are particularly important in the light of "green" policies and the digitalisation of our industry.

Therefore, FIEC is actively involved in two European projects, co-financed by the European Commission.

The first "SKILLCO" (www.skillco.eu), is coordinated by the Chamber of Construction and Building Materials Industry (CCIS CCBMIS), our Slovenian member, and brings together social partners organisations and training providers from Germany, Hungary and Slovenia, as well as FIEC.

The main goals of the project are to identify existing skills gaps and develop corresponding learning units that could be integrated in formal VET (Vocational Education and Training) programmes at national level. In a second phase, for each of the skills gaps identified ("Green" skills, numeracy, literacy and health and safety) two VET modules, pupils and workers respectively, will be developed and integrated in a mobile app training tool.

The project is a practical attempt to develop and implement comparable curricula in different countries, with the aim of fostering workers' mobility.

The second project, "VET4LEC – Inclusive Vocational Education and Training for Low Energy Construction", co-financed by the European Commission (DG EMPL), is coordinated by FIEC in cooperation with our social partner EFBWW (European Federation of Building

and Wood Workers) 10 other national partners and the University of Westminster.

The project intends, amongst other things, to identify the ways in which:

- coordination between occupations involved in low energy construction on site can be improved so as to reduce the performance gap between design intent and implementation and meet energy efficiency targets;
- opportunities for low energy construction (LEC) and interdisciplinary Vocational Education and Training (VET) can be extended so as to enhance the attractiveness of the sector.

II. Attracting and retaining young people in the construction industry: an on-going key challenge for the future

In the framework of the EU sectoral Social Dialogue for the construction industry, FIEC and EFBWW developed a website, with the financial support of the European Commission, aimed at presenting national best practice concerning tools/initiatives to promote youth employment in the construction industry. The regularly updated website (www.construction-for-youth.eu) presents more than 40 different initiatives from 15 different countries.

Also aimed at promoting a positive image of the sector to young people, FIEC is remains an associate partner of "WorldSkills Europe" (www.euroskills.org), which promotes excellence in the field of skills and competence development across the EU, amongst other things through bi-annual competitions, the next one taking place from 26-28 September 2018 in Budapest.

The activities of FIEC also focus on **apprenticeships** and work-based learning, to facilitate the transition from education and training to work. One main reason for this approach is that evidence suggests that countries with a strong "dual" vocational education and training (VET) and apprenticeship systems have lower levels of youth unemployment than countries without such systems.

B) Improving Health & Safety at the workplace for the benefit of enterprises and their workers

Despite the overall reduction in the number of work-related accidents and illness, improving health and safety in the workplace continues to be a priority action for the construction sector and for FIEC.

I. Revision of the “Carcinogens” Directive and “Respirable Crystalline Silica” (RCS)

An ongoing priority for the European Commission is the revision of the existing Directive 2004/37/EC on the “Protection of workers from the risks related to exposure to carcinogens or mutagens at work” (hereafter “Carcinogens” Directive). FIEC closely followed the first proposed revision, which eventually led to the inclusion of “Respirable Crystalline Silica” (RCS) in the scope of the directive.

Constituting 12% of the Earth’s crust, quartz, the most common form of crystalline silica, is the second most abundant natural mineral. Crystalline silica is therefore an essential component of materials in extensive use in the construction industry (bricks, mortar, windows, etc.).

The construction sector is characterised by a wide variety of temporary activities, which imply significant variations in the possible levels and types of exposure of workers to RCS : for example, in any one day the same worker could undertake the same task in both a closed and open air environment.

Exposure to RCS is therefore a complex issue, particularly in the construction sector, and each profession has its specific circumstances, risk assessment procedures and risk management measures that have to be taken into account.

The EU legislator finally agreed an OEL (occupational exposure limit value) for RCS of 0.1 mg/m³ which both FIEC and the EU Advisory Committee on Safety and Health recommended in the final phases of the legislative procedure.

A working group comprising FIEC and its social partner EFBWW will now discuss possible joint practical initiatives aimed at ensuring adequate application and enforcement of these new provisions on construction worksites.

II. Working safer with earth moving machines

Construction worksites change continuously and many different stakeholders interact on them. These conditions require rigorous occupational safety and health, in particular regarding earth-moving machinery, which can cause serious and fatal accidents. Hazards include, amongst others, possible incorrect operation of the machine, the ergonomics of the machinery itself (access, driver seats, etc.), and the operator’s visibility around the machine.

Against this background, FIEC, the EFBWW and CECE (the Committee for European Construction Equipment) finalised a joint project, co-financed by the European Commission (DG EMPL), aimed at improving the health and safety conditions when working with construction machinery by establishing, as a first step, a better dialogue between the users and the producers of such machinery.

Four factsheets have been produced (available in various EU languages on www.fiec.eu), about site organisation and training; ergonomics; standards; collision avoidance.

A Memorandum of Understanding between the three organisations has also been signed establishing the basis for follow-up initiatives to explore further ways of improving existing design and configuration of machinery and standard processes.

III. Management of psycho-social risks at the workplace: improving quality and productivity at work

Studies suggest that 50–60 % of all lost working days can be attributed to work-related stress and psycho-social risks. It is the second most frequently reported work-related health problem in Europe after musculoskeletal disorders.

It is highly complex and not easy to deal with, as it mixes work-related and personal factors, but employers have nevertheless the obligation to assess and manage psycho-social risks at the workplace and they are encouraged to implement additional voluntary measures. Such legal obligations and voluntary initiatives are important to running a successful business and retaining a motivated and healthy workforce.

DiscoverYourTalent (European Vocational Skills Week 2017)
European Alliance for Apprenticeships Ceremony Awards (24/11/2017 – Brussels)



Award given by EU Commissioner Marianne Thyssen to Ulrich Paetzold representing the German SME Schleiff Bauflächentechnik – Winner of the EAfA Awards, category SMEs

FIEC and the EFBWW therefore started a new joint social dialogue project (co-financed by the European Commission) aimed at assessing the main factors of psycho-social risks in the workplace in the construction sector, collecting and sharing examples of national best practice and finally, developing a common methodology to address such risks. The project will run until the end of 2018.

C) Setting a level playing field for fair mobility in the Internal Market

I. Posting of Workers and Social Security: key issues for the long term sustainability of national socio-economic models

Construction companies face increasing competition and cases of fraudulent practice. This is partly due to a legislative framework which is sometimes unclear, to difficulties in enforcing it

or to inadequate controls, in particular in cross-border operations. In addition, very different national social security regimes can become a serious concern in cross-border operations.

Mobility and freedom to provide services within the Single Market are amongst the main pillars of EU competitiveness and should therefore be promoted. However, this should be done without jeopardising the economic and social models that have been put in place in the different Member States.

Within this framework the European Commission decided to propose a targeted revision of the “Posting of Workers” Directive 96/71/EC with the aim, on the one hand, of addressing unfair practices and, on the other, of promoting the principle that the same work at the same work place should be remunerated in the same manner.

FIEC has always considered such a revision of the “Posting” Directive as premature, partly because of the on-going implementation of the “Enforcement” Directive 2014/67/EC. For FIEC the Commission’s proposal did not address the real concerns related to “posting”. Most of the problems identified are linked, on the one hand, to difficulties in the application and enforcement of the existing

legislative framework and, on the other, to illegal practices. These problems must take priority.

In addition, a proposal for amending the existing EU “Social Security” Regulations 883/2004 and 987/2009 has also been presented by the European Commission and is now being examined by the European Parliament and the Council.

At the time of writing, both legislative procedures are ongoing and it is therefore not yet possible to assess their added value. They will however play a key role in shaping and ensuring the long term sustainability of our national socio-economic models and FIEC will therefore continue to be active.

FIEC is also closely monitoring the developments regarding the proposal for setting up a new European Labour Authority and will assess its possible added value in addressing issues related to cross-border fraud.

II. EU Platform for tackling undeclared work

In May 2016 a European Platform against undeclared work was officially launched. It brings together relevant national enforcement bodies such as labour and social security inspectorates, etc., as well as other stakeholders, such as EU-level representatives of employers, including FIEC, and employees.

The 2017-2018 work programme sets out the priorities of the Platform and construction and

transport, two sectors heavily affected by undeclared work, will be the target of specific activities.

All information regarding the activities and the outcomes produced so far can be found on a dedicated website : <http://ec.europa.eu/social/main.jsp?catId=1299&langId=en>

III. Further strengthening the EU Sectoral Social Dialogue

Since the beginning of 2017 the boards of FIEC and EFBWW have held regular joint meetings in order to further strengthen their involvement in the EU Sectoral Social Dialogue.

Both organisations agree on the importance of reinforcing the sectoral social partners' impact on EU legislation, with joint initiatives on topics of common interest, amongst other things. Previous experience has shown that such joint initiatives can influence the EU Institutions at the highest political levels.

Within this framework a cooperation agreement was signed with the AEIP, the European association of paritarian institutions, in which most Western Member States employers' and workers' representatives cooperate in the fields of training, health and safety and social protection at sectoral level.

7/11/2017 – meeting in Paris
Signature of the Cooperation Agreement between FIEC – EFBWW – AEIP



From left to right : Domenico Campogrande (FIEC), Werner Buelen (EFBWW), Brahim Hilami (EFBWW), Sam Hägglund (EFBWW), Kjetil Tonning (FIEC), Mercedes Landolfi (EFBWW), Gunde Odgaard (EFBWW), Bruno Gabellieri (AEIP), Ulrich Paetzold (FIEC), Jean-Louis Marchand (FIEC), Michel Dieu (AEIP)

Here are just a few examples of what the SOC Commission has delivered over the past year, on its own or jointly with the EFBWW (European Federation of Building and Wood Workers) within the sectoral European social dialogue:

- FIEC-EFBWW website on “Initiatives for youth employment in the construction industry” (www.construction-for-youth.eu)
- Joint FIEC-EFBWW-CECE project on “Working safer with construction machines – A multi-stakeholders approach” (VS/2015/0340)
- Joint FIEC-EFBWW project “VET4LEC - Inclusive Vocational Education and Training for Low Energy Construction” (VS/2016/0404)
- Partner in the project “SKILLCO - An innovative project for facing skills gaps in the construction industry” coordinated by our Slovenian member CCBMIS
- Partner in the project “Enhancing administrative cooperation through coordinated transnational actions” coordinated by INTEFP and ASTREES (FR)

Position Papers

Joint FIEC-EBC position paper on the revision of the “Carcinogens” Directive 2004/37/EC (23/2/2017)

Joint social partners (construction, cleaning, insurance sectors) position on the proposed “E-Services card” (10/5/2017)

FIEC position on the revision of the “Social Security” Regulations 883/2004 and 987/2009 (9/1/2018)

Others

Joint FIEC - EFBWW Press Release - The social partners of the construction industry, strongly reject the proposed European services e-card (16/1/2017)

Cooperation agreement between FIEC-EFBWW-AEIP (7/11/2017)

Participations in public events

ERA Convention “Securing talent for the future” (Amsterdam, 2/5/2017) - Presentation by Domenico Campogrande, Director Social Affairs

Build Up Skills “Green jobs for energy efficiency : meeting the needs of the construction sector” (Brussels, 1/6/2017) - Presentation by Domenico Campogrande, Director Social Affairs

EDA (European Demolition Association) Forum “Attracting workers to the constructions sector” (Brussels, 16/6/2017) - Presentation by Domenico Campogrande, Director Social Affairs

“Green Jobs for a greener Europe” (Brussels, 22/6/2017) - Presentation by Ulrich Paetzold, Director General

UNIEP “A European skills base for health and safety at work” (Brussels, 25/8/2017) - Presentation by Ulrich Paetzold, Director General

FIEC-EFBWW-CEI Bois Conference on “Wood construction” (Brussels, 21/11/2017) - Presentation by Domenico Campogrande, Director Social Affairs

Housing Europe seminar (Brussels, 20/2/2018) - Presentation by Domenico Campogrande, Director Social Affairs

All these documents are available on the FIEC website www.fiec.eu

TECHNICAL COMMISSION (TEC)

Kjetil Tønning, NO
President

Sue Arundale, FIEC
Rapporteur



SUB-COMMISSION TEC-1

SUB-COMMISSION TEC-2

SUB-COMMISSION TEC-3

“DIRECTIVES, STANDARDS AND
QUALITY ASSURANCE”

“RESEARCH, DEVELOPMENT AND
INNOVATION”

“ENVIRONMENT”

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Jan Coumans, BE
Chairman

Eric Winnepenninckx, BE
Rapporteur



Claude Dumoulin, FR
Chairman

Pascal Lemoine, FR
Rapporteur



Lennart Henriz, SE
Chairman

Marianne Hedberg, SE
Rapporteur

Two TEC issues accounted for most of the work in 2017, while digital construction emerged as the new subject having a major impact already during the year and for the foreseeable future. The Clean Energy Package, published late in 2016, contained a small reference to a possible revision of the Construction Products Regulation and a Commission legislative proposal for revision of the Energy Performance in Buildings Directive (EPBD). Both proved to be the major concerns for TEC in 2017. Digital construction generated new work, to assess the impact on the industry of robotisation, automation, prefabrication and new processes.

A) Regulatory Matters

I. Construction Products Regulation (CPR)

The European Commission launched a formal process to consider the revision of the Construction Products Regulation. A new forum, the CPR Technical Platform, was created to explore potential solutions to the shortfalls identified by stakeholders, in both the regulation itself and the implementation. FIEC published a [position paper in July](#)¹ calling for targeted revision and opposing repeal of the regulation, one of several options contained in a Commission Inception Impact Report. For FIEC the main problems remain the widespread misunderstanding of the meaning of CE marking and the fact that contractors cannot rely on this to ensure that the products they select are fit for the intended use. Although FIEC accepts that not all information

can be contained in the Declaration of Performance, it is seeking flexibility over the provision of additional information, including non-regulatory characteristics. A pragmatic solution would ensure that contractors have the information they need and leave them less exposed to risks and liability in case of failure of a CE marked construction product after installation. More details can be found in the position.

1. Joint response to Commission document on additional characteristics

FIEC worked with several Member States and other stakeholders, to produce a joint letter asking for the withdrawal of a Commission document, the status of which was ambiguous and led to much confusion in the Standing Committee on Construction. As the Commission presented a revised version of the document in December, a second letter was sent in January 2018, this time with more Member States participating.

2. Study on information needs of users of construction products

This Commission study was aimed at actual users rather than federations, so FIEC did not submit a response. Instead, it actively promoted the study amongst its members and encouraged the widespread involvement of contractors.

3. Public consultation on EU rules for products used in the construction of buildings and infrastructure works

This Commission consultation was launched in January 2018. At the time of writing, FIEC's response is being prepared.

B) Standardisation Matters

I. Joint Initiative on Standardisation (JIES)

FIEC continued to participate in Action 5, a Pilot Project - Aiding the implementation of the Construction Products Regulation (CPR) through standards.

¹ (13/07/2017)

II. CEN Technical Committees

FIEC's liaison status on a number of CEN Technical Committees (TCs) continues, as part of its agreement with CEN as a Partner Organisation.

Pending:

- CEN/TC 135/WG15
Scope of EN 1090

Approved, but no representative:

- CEN/TC 89 Thermal performance of buildings and building components

FIEC representative:

- CEN/TC 104 Concrete and related products
- CEN/TC 135 Execution of steel structures and aluminium structures
- CEN/TC 250 Structural Eurocodes
- CEN/TC 292 Post vacant
- CEN/TC 350 Sustainability of construction works
- CEN/TC 434 Electronic Invoicing in Public Procurement (for ECO)
- CEN/TC 440 Project Committee on Electronic Public Procurement
- CEN/TC 442 Building Information Modelling (BIM)

III. Execution Standards

In June 2017, FIEC published a [position on Execution Standards](#). Partly as a response to inclusion of execution aspects in the development of a limited number of standards, FIEC stressed that harmonised European standards covering the installation and execution of construction materials are very difficult to achieve, given the highly country-specific nature of these practices. Regulatory differences at national level as well as cultural norms, based on national traditions that have been used for many decades, make the widespread standardisation of installation and execution inappropriate. FIEC believes that such

standards should only be developed on a case by case basis and only with the full inclusion of contractors in the relevant CEN Technical Committees.

C) Promoting Innovation and Research

I. ECCREDI

FIEC took over the Presidency of the European Council for Construction Research, Development and Innovation (ECCREDI). One of its first actions was to invite non-member organisations active in construction to the Council meeting in November. In 2018 a meeting is planned with [ENCORD](#), an organisation of construction companies with similar objectives related to research and development. ECCREDI also has connections with other key players, in particular the [European Construction Technology Platform \(ECTP\)](#) and joint actions are planned for 2018, including the contribution of ideas for the next framework programme, the successor to Horizon 2020.

II. Construction 4.0 and BIM

See separate section on Construction 4.0 Working Group (page 15).

D) Circular Economy

I. Revision of Waste Directives

Following very long and difficult negotiations, the Council, under the leadership of the Estonian Presidency and the European Parliament reached a provisional agreement on the legislative proposals in the waste package in December 2017. The two proposals for which FIEC had submitted comments to the European Parliament Rapporteur in 2016 are those concerning the revisions to the Waste Framework Directive and the Landfill Directive.

The new legislation will be subject to a European Parliament vote and is then expected to be adopted early in 2018. Meanwhile, the EU Plastics Strategy was published in January 2018 and at

the time of writing, FIEC is analysing the proposals with a view to preparing a response later in the year.

FIEC's **position on the Circular Economy Action Plan** was published in January 2016.

E) Resource Efficiency

I. Voluntary assessment framework on environmental performance in buildings

1. Level(s) published in 2017

The long awaited voluntary **assessment framework** was published by DG ENV in 2017. The result of three years of work by DG ENV with the Joint Research Centre with stakeholders including FIEC, the framework contains a small number of sustainability indicators and is aimed at various users, including contractors.

FIEC is broadly supportive of the framework, although has stressed that those carrying out assessments need to be competent, properly trained and subject to a consistent approach. One very pleasing aspect is the adaptation of existing voluntary harmonised European standards (hENs) for sustainability assessment, to ensure compatibility with the framework. The pilot phase will start in 2018 and DG ENV will offer a support system to ensure that any early problems experienced by assessors are detected and resolved.

F) Energy efficiency

I. Energy Performance in Buildings – Revision of EPBD

Following the proposal for certain revisions to the Energy Performance in Buildings Directive, published as part of the Clean Energy Package in November 2016, a relatively swift negotiation process resulted in agreement between the co-legislators in December 2017. **FIEC's position**, published in March 2017, was broadly reflected by the Rapporteur's report and it looks as though the final legislation will be workable for contractors. One aspect that remains very unclear, following a stakeholder meeting with DG ENER in December 2017, is the Smartness Indicator. There is some confusion over the

fundamental difference between a "smart" building and a "smart-ready" building, FIEC is very concerned that it is not even clear what any eventual Smartness Indicator will measure. Furthermore, it seems unlikely that any Smartness Indicator will stimulate the construction of smart or smart-ready buildings or the renovation of others to smart-ready standards. Indeed, FIEC believes that – particularly as a result of the rapid changes following the advent of digital construction and the enormous focus on digitalisation in general – smart buildings are an inevitable consequence. Therefore, the federation is not convinced of the value of the proposed Smartness Indicator, but remains engaged in the dialogue and willing to assess carefully any proposals as they evolve.

What is certain is that the revised EPBD needs to stimulate the renovation of existing buildings, targets for which are far from being achieved.

DDR Forum 2017 (DDR – Demolition, Decontamination and Recycling)
Brussels, BE (14/6/2017)



Presentation by Claude Dumoulin,
Chairman of TEC-2 on "Digitalisation and
BIM applied to construction products"

Here are just a few examples of what the Technical Commission has delivered over the past year:

Position Papers

FIEC Position Paper – Execution Standards (15/06/2017)

FIEC Position Paper – Revision of the Construction Products Regulation (13/07/2017)

FIEC also sent the following correspondence, expressing concern:

Joint letter with some Member States and other federations to the acting Head of Unit in the Construction Unit, DG GROW reacting to a paper presented to the Standing Committee on Construction, on additional characteristics under the Construction Products Regulation (12/07/2017)

Comments to the European Parliament on Fire Safety (07/09/2017)

Second joint letter with some Member States and other federations to the Head of Unit in the Construction Unit, DG GROW reacting to a revised paper presented to the Standing Committee on Construction, on additional characteristics under the Construction Products Regulation (29/01/2018)

Press Releases

“FIEC against over-prescriptive execution standards” (19/06/2017)

“No repeal of the CPR but let’s revise it to make it work” (14/07/2017)

“Energy renovation challenge oversimplified by EPBD” (27/09/2017)

“FIEC takes over presidency of ECCREDI” (09/11/2017)

“Industry Stakeholders are ready to take the lead in digital construction” (23/02/2018)

Other Publications

“Sustainability in the built environment”. Article for Pan European Networks, Government 24 (01/2018)

Answers to public consultations

Horizon 2020 Interim Evaluation (13/01/2017)

Participation in interview with VVA for study on the CPR (08/08/2017)

Participation in public events

See FIEC list of selected event (chapter Communication) on page 48

All these documents are available on the FIEC website www.fiec.eu

SMALL AND MEDIUM-SIZED ENTERPRISES (SMEs)

Daniel Nicolardot, FR
The SME-Envoy

Ulrich Paetzold, FIEC
Rapporteur



A) Full representativeness for micro, small, medium-sized and large enterprises

The European construction industry is overwhelmingly made up of craftsmen, SMEs and family-owned businesses. The membership of its Member Federations ensures FIEC's representativeness, with enterprises of all sizes, undertaking all kinds of building and civil engineering operations.

These enterprises may be family-owned or capital stock companies. They may be family-run or managed externally, but they are all construction firms and, as such, they have much more in common than they have in terms of any conflicting interests.

The FIEC Vice-President "SME Envoy" double-checks that all FIEC position papers and initiatives adequately take into account the interests of SMEs and family-owned businesses.

B) Full involvement of SMEs in the sectoral social dialogue

FIEC's representativeness was acknowledged again in the latest "representativeness study" for the European Commission: 56.1% of all operatives in the construction industry are employed by enterprises affiliated to FIEC Member Federations - by far the highest rate of all employers' organisations checked.

FIEC and its Social Partner EFBWW, are very committed to this representative, strong, successful and autonomous Sectoral Social Dialogue which they started years prior to it becoming institutionalised by the European Commission.

C) Close cooperation with cross-sectoral organisations

FIEC's national Member Federations are affiliated to cross-sectoral employers' organisations which are affiliated to the European cross-sectoral organisations **BusinessEurope** or **UEAPME**. FIEC keeps close contacts with both on subjects such as public procurement, social affairs, technical affairs and standardisation and ensures that the specific interests of the construction industry are adequately taken into consideration.

THE EURO-MEDITERRANEAN PARTNERSHIP (MEDA)

Maria Ángeles Asenjo, ES
President

Ulrich Paetzold, FIEC
Rapporteur



Over the last year FIEC continued informing Member Federations about key aspects of the EU institutions' activity with regard to Southern Mediterranean partner countries, in particular in the context of the European Neighbourhood Policy.

On 18 May 2017 the European Commission and the High Representative of the Union for Foreign Affairs and Security Policy, presented a joint report on the **implementation of the European Neighbourhood Policy (ENP)**. This report took stock of the latest developments in the EU's relations with these partner countries. It was the first report following the review of the ENP in November 2015 and it contained different sections: state of play of bilateral and regional engagement, progress on key priorities and EU assistance to support the Neighbourhood.

It is worth remembering that the ENP was launched in 2004 based on the Communication entitled "Wider Europe - Neighbourhood" published by the EC one year earlier. Since then, this Policy has evolved considerably, due to a number of radical changes and challenges in the region in terms of stability, prosperity and security. With the ENP review in 2015, the EU, while continuing to defend the core European values and human rights, agreed on tailor-made approaches and differentiated partnerships according to country-by-country developments. In political terms, four main domains are the core goals: good governance, democracy, rule of law and human rights, economic development for stabilisation, security, migration and mobility. The EU provides support to partners in the region mainly through the European Neighbourhood Instrument (ENI).

On 26 September 2017 the European Parliament and the Council adopted the **European Fund for Sustainable Development (EFSD)**, an integral financing mechanism to support investments by public financial institutions and the private sector. The EFSD is an essential piece of the EU's new

External Investment Plan (EIP). The EIP will promote more sustainable and inclusive development in the European Neighbourhood and in Africa. The following concrete priority areas for investment, "investment windows", have been identified:

- Sustainable Energy and Connectivity,
- Financing for Micro, Small and Medium Enterprises,
- Sustainable agriculture, rural entrepreneurs and agroindustry,
- Sustainable cities,
- Digitalisation for development.

Another area of attention is the **Union for the Mediterranean**, an intergovernmental organisation which brings together EU Member States and 15 countries from the Southern and Eastern Mediterranean. It is a permanent structure dedicated to strengthen dialogue, cooperation and exchange of projects ideas. Its work is focused on these six strategic areas: business development, social and civil affairs, higher education and research, transport and urban development, water and environment, and energy and climate action.

Regarding the **European Investment Bank** activity in this region in 2017, initial data about projects financed show approximately €1.9 billion in loans for 32 operations. Main beneficiaries of this EIB financing were: Morocco 25%, Egypt 25%, Tunisia 21% and Lebanon 20%. By sector mainly: credit lines 63%, transport 16%, energy 6% and industry 6%.

As usual, **MEDA newsletters** are available periodically on the FIEC website for Member Federations.

“HOUSING” WORKING GROUP

José Michaël Chenu, FFB

Chairman

Myriam Diallo, FFB

Rapporteur



Mr José-Michaël Chenu, from the French federation FFB, has been chairing the Working Group “Housing” since December 2016. The latest meeting took place on 7th September 2017.

The Working Group agenda

The Chair’s strategy is based on the rationale that EU contractors should be at the forefront of the housing industry. As key industrial players in an integrated sector together with all other relevant players, they should show their capacity on construction projects’ management. This vision takes into account many aspects: prefabrication, development of BIM, energy efficiency, services provided to the users, traceability in time, building passports, maintenance contracts and facility management, etc. In this framework, participants exchange information about their national housing sector (e.g. legal and fiscal environment). They agreed to work on a FIEC paper, which would develop solutions from the construction industry, including the following issues: housing construction costs (i.e. how to build less expensively tomorrow) and housing shortages (i.e. best practice in terms of national measures aimed at tackling this shortage).

FIEC in the “European Housing Forum”

The “European Housing Forum” (EHF), partner of the “European Parliament URBAN Intergroup”, is a discussion platform on European policy topics affecting the housing market. For FIEC, EHF is a key partner. EHF members include, amongst others, representative associations of tenants, social housing, developers, real-estate professions and contractors. Being co-chair of the European Housing Forum along with UIPI and UEPC is an honour for FIEC and allows the Federation to contribute actively to the discussions on housing issues, in close contact with the EU institutions.

Meetings take place about 4 times a year. The agenda of the last meeting, held on 6th December 2017, was dedicated to a project on “green mortgages”, presented by the European Mortgage Federation.

More information on the EHF website:
<http://www.europeanhousingforum.eu/>

EUROPEAN INTERNATIONAL CONTRACTORS (EIC)



EUROPEAN
INTERNATIONAL
CONTRACTORS



Philippe Dessoy, BE
President



Frank Kehlenbach, EIC
Director

European International Contractors (EIC) represents the international interests of the European construction industry vis-à-vis European policy makers, international financial institutions and society. Its full members are construction federations from 15 European countries, which are directly or indirectly affiliated to FIEC and have internationally active member firms.

A) Organisation

EIC was founded in 1970 and is registered since 1984 as a legally independent business association under German law. Its mandate is to promote the interests of the European construction industry in relation to its international business activities. EIC advocates fair international competition based on fair contract conditions and quality-based procurement, promotes effective export finance schemes for construction services and provides a unique networking forum between the industry and other stakeholders.

At the end of 2017, the composition of the EIC Board was as follows:

- President: Philippe Dessoy (Besix, Belgium)
- Vice President: Wouter Remmelts (BAM International, the Netherlands)
- Treasurer: Juha Kostianen (YIT Corporation, Finland)
- Luis Ballester Surroca (OHL, Spain)
- Nils Bjelm (NCC, Sweden)
- Selim Bora (Summa, Turkey)
- Lars M. Carlsen (Per Aarsleff, Denmark)
- George Demetriou (J&P Avax, Greece)
- José Pedro Freitas (Mota Engil Group, Portugal)
- Christophe Pélissié du Rausas (VINCI Concessions, France)
- Gianni Porta (Itinera, Italy)
- Karl-Heinz Strauss (PORR, Austria)
- Jörg Wellmeyer (Strabag International, Germany)

President Dessoy also represents EIC as a Vice-President on the FIEC Steering Committee.

B) FIDIC Standard Forms of Contract

Throughout 2017, EIC liaised with FIDIC and other “friendly reviewers” of the FIDIC standard forms of contract in preparation for the launch of the new edition of the FIDIC Suite of Contracts (“Red, Yellow, Silver Books”) in December 2017. In January, EIC rallied support from other international contractors associations, namely CICA, ICAK from Korea, OCAJI from Japan and CHINCA from China, to express the common concerns of international contractors with respect to the risk profile laid down in the 2016 pre-release version of the FIDIC “Yellow Book”. During spring 2017, experts of the **EIC Working Group “Contract Conditions”**, and also from associated company members, explained to FIDIC the pitfalls of some of the proposed new clauses and concepts. EIC was pleased to note that many of its comments had been accommodated in the updated edition, which was eventually launched in December 2017. At the beginning of 2018, the EIC Working Group “Contract Conditions” started to update the EIC Contractor’s Guides on the FIDIC standard forms.

C) EU External Investment Plan (EIP)

In September 2017, the European Parliament and Council adopted the European Fund for Sustainable Development (EFSD), the backbone of the EU’s new External Investment Plan (EIP). The main objective of the EIP is to mobilise and leverage sustainable public and private investment to improve economic and social development with a particular focus on the EU Neighbourhood region and on Africa. This new EU Financing Instrument takes up the main theme of EIC’s “Blending 2.0” concept, namely to blend concessional and commercial finance for development projects. The European Commission has invited pillar-assessed eligible counterparts to send Proposed Investment Programmes under the five defined investment windows, including “Sustainable Cities” and “Sustainable Energy and Connectivity”. The **EIC Working Group “Africa”** met in September 2017 to analyse the new EIP and has called upon the European Commission to incorporate the existing nationality and eligibility rules of the EU PRAG into the EIP framework and to take into consideration the socio-economic benefits of infrastructure projects when assessing the financial viability of projects.

D) World Bank’s Environmental and Social Management System (ESMS)

In June 2017, the **EIC Working Group “Africa”** participated together with CICA representatives in a World Bank webinar on the Environmental, Social, Health and Safety (ESHS) improvements to the Bank’s Standard Procurement Documents. The improvements address the lessons learned from the Uganda Transport Sector Development Project (which had significant ESHS issues) which cover, amongst others, the following topics: Contractor’s ESHS Management Strategy and Implementation Plans, ESHS Performance Security and Provisional Sum, ESHS Reporting and ability to withhold interim payment(s). In a joint letter, EIC and CICA expressed their support for this new World Bank policy and recommended a better use of the ISO 26000 standard on Social Responsibility. They also advocated the incorporation of the ILO Core Labour Standards, guaranteeing the fundamental principles and rights of workers, into the Bank’s procurement policy and documentation.

E) OECD Local Costs rule in relation to Construction Services

On 14 November 2017, EIC participated with three members of its **Working Group “Export Credits”** in a Consultation Meeting at the OECD headquarters in Paris. EIC representatives took the opportunity to explain to OECD governments and export credit agencies why the restriction of official support for local costs to 30% of the export contract value was no longer appropriate. The Business and Industry Advisory Council to the OECD (BIAC) called upon the OECD to quickly change the so-called “OECD Consensus” in order to enable export credit agencies to provide insurance for local costs up to the same amount as the export contract value across all sectors. Moreover, they suggested adopting a new Sector Understanding on large construction and engineering (including EPC) projects, which recognised the fact that the export of engineering and construction services require a much higher amount of local costs than of other goods and services.

F) Corporate Responsibility (CR)

The **EIC Working Group “Corporate Responsibility”** met several times throughout the year and published an **EIC Corporate Responsibility Report** which contains information about European best practice in handling CR aspects in the international construction markets. With its latest publication, EIC illustrates the various contributions of European international contractors to the UN Sustainable Development Agenda. The publication focuses on CR aspects most relevant for the construction industry: Adapting to Climate Change, Business Ethics, Continuous Learning and Transfer of Know-how, Creating added value in communities, Engagement with Stakeholders, Greening Operations and Conserving Resources, Health & Safety as well as Human Rights.

G) EIC Statistics

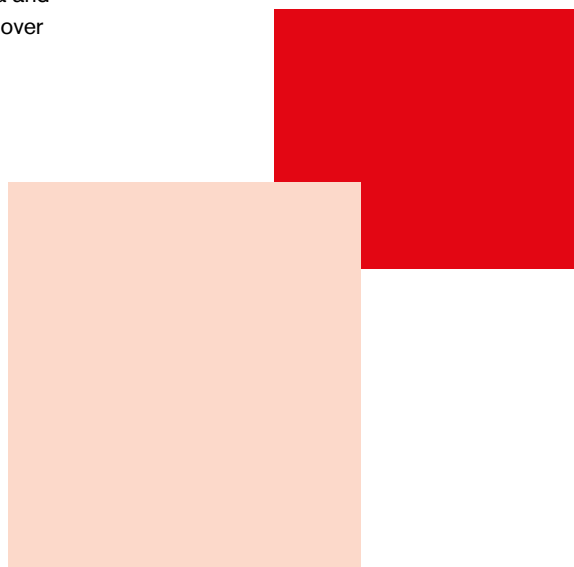
In October 2017, EIC released its annual International Contracts Statistics according to which European international contractors affiliated with EIC’s member federations generated an accumulated international turnover amounting to €172 billion in 2016. European cross-border construction activities amounted to around €72 billion, combined revenues in North America and Australia reached some €40 billion and turnover in the non-OECD countries €60 billion.

H) EIC Conferences

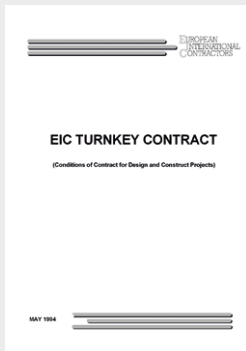
On 21 April 2017, EIC held its Spring Conference in Copenhagen. Workshop discussions focused on “Sustainable Solutions for Urban Areas – Business Opportunities for European Contractors in the light of the Sustainable Development Goals”. On 13 October 2017, EIC held its Autumn Conference in Paris with a Workshop on “The Global Infrastructure Funding gap – Why it exists and how it can be overcome”.

To sign up for the monthly EIC Newsletter and further information on EIC activities, conferences and members, visit the EIC website: eic-federation.eu.

For joint FIEC/EIC activities please refer to chapter on page 17.



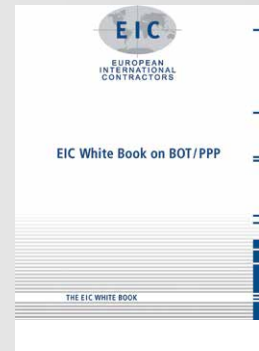
EIC publications



EIC Turnkey Contract, 1994



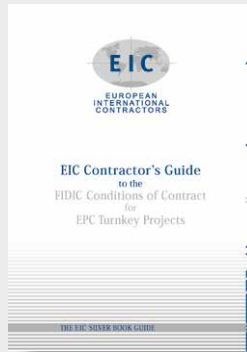
EIC Contractor's Guide to the FIDIC Conditions of Contract for Construction, 2002



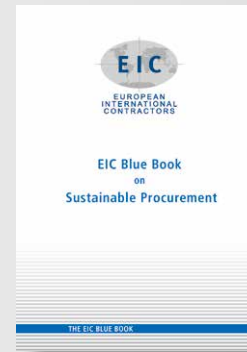
EIC White Book on BOT/PPP, 2003



EIC Contractor's Guide to the FIDIC Conditions of Contract for Plant and Design-Build, 2003



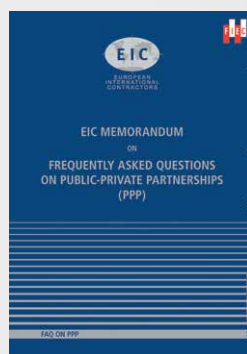
EIC Contractor's Guide to the FIDIC Conditions of Contract for EPC Turnkey Projects, 2003



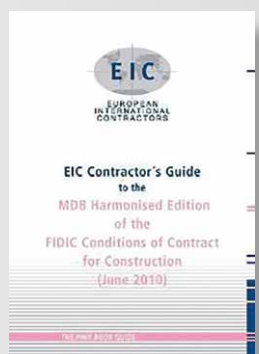
EIC Blue Book on Sustainable Procurement, 2004



Contractor's Guide to the FIDIC Conditions of Contract for Design, Build and Operate Projects, 2009



EIC/FIEC Memorandum on Frequently Asked Questions on Public-Private Partnerships (PPP), 2006



EIC Contractor's Guide to the MDB Harmonised Edition of the FIDIC Conditions of Contract for Construction (June 2010), "The Pink Book Guide", 2011

For FIEC publications, please refer to p. 47

CONFEDERATION OF INTERNATIONAL CONTRACTORS' ASSOCIATIONS (CICA)



Jorge Mas
CICA President



Roger Fiszelson
Director General
(-12/2017)



Fanny Dastugue
Director General
(01/2018-)

A) Main CICA Events

I. CICA Mission to Japan and South Korea, June 2017

The Overseas Construction Association of Japan Inc. hosted the last CICA Spring Board-Council meeting. CICA met the Asian Development Bank, the Japan Bank for International Cooperation and the Ministry of Land, Infrastructure, Transport and Tourism to discuss "Quality in Infrastructure" and "Productivity of the construction sector". In particular, discussions focused on the introduction of new technologies in the construction industry. A visit to the Laboratory of the Shimizu Corporation showcased Japanese innovation in building resilience to seismic activity. Representatives from Obayashi, Taisei and Takenaka corporations also participated. While in Asia, a CICA delegation attended the Annual Meeting of the Asian Infrastructure Investment Bank in Jeju where the CICA Director General delivered a speech about Well-Prepared Projects to fight against corruption.

II. CICA Conference on "Meeting the infrastructure needs", Paris, November 2017

The CICA Conference "Meeting the infrastructure needs" brought together Contractors and representatives from international development organisations, notably the OECD and the United Nations to discuss solutions to bridge the funding infrastructure gap.

III. United Nations Organisation Meetings

CICA is participating in UNECE meetings about PPPs and in UNCITRAL work for the review of the PPP legislative guide, to ensure that the construction point of view is represented.

IV. Organisation for Economic Cooperation and Development (OECD) Meetings

CICA regularly participates in OECD meetings. CICA also has ongoing dialogue with the Business and Industry Advisory Committee to the OECD.

V. International Chamber of Commerce (ICC) Meetings

CICA participates regularly in the meetings of ICC International Commissions including Commercial Law and Practice, Corporate Responsibility and Anti-corruption, Intellectual Property; Environment and Energy.

VI. B 20 Meetings

CICA is very involved in the work of the B20 Argentina 2018, which follows the B20 Germany 2017, in which CICA also participated. CICA benefits from the coordination work done by Fernando Lago from the Argentine Chamber of Construction (CAC). The latter is a co-chair of the "Financing Growth and Infrastructure Task Force".

B) CICA Working Groups

I. Public-Private Partnerships (PPPs)

The working group on PPPs, chaired by Fernando Lago (Argentina), disseminates knowledge about the minimum conditions necessary for the successful use of PPPs. It collects best practice from around the world and disseminates PPP regulations. It also issues recommendations to facilitate the use of PPP schemes. CICA acts as a Friendly Reviewer of the standards drafted by the UNECE International Centre of Excellence on PPPs and participates in the work of UNCITRAL on PPPs Model Law.

II. Multilateral Development Banks (MDBs)

The working group on MDBs, chaired by Roger Fiszelson (France), mainly monitors changes to procurement policies, environmental, social and Health and Safety (ESHS) requirements. It also follows capacity strengthening measures, Value for Money decision-making, International Competitive Bidding and Integrity. CICA organises construction sector missions to MDBs headquarters and meetings with Heads of Procurement. Since 2005, CICA, with EIC and FIDIC, has been a partner in the successive consultative working groups set up by the MDBs.

III. Well-Prepared Project (WPP)

The working group on WPP, chaired by Michel Démarre (France), focuses on the development and promotion of the SOURCE platform, launched by the Sustainable Infrastructure Foundation. SOURCE is considered by contractors as the right tool to ensure that projects are well-prepared by their clients and transaction costs are minimised. CICA has been pushing hard for the promotion of SOURCE at B20 level, both as a tool to facilitate project financing and as a way of achieving better transparency in project preparation and procurement. CICA conceived the concept of WPP, first introduced in the B20 and G20 final declaration in Cannes in 2011.

IV. Infrastructure Long Term Financing

The working group on long term financing of infrastructure, chaired by Vincent Piron (France), focuses on mobilising private and public funds to achieve more infrastructure projects. It aims

CICA Spring Board-Council Meeting held in Tokyo on 12-13 June 2017



Yoshihiro Yamaguchi (OCAJI COO), Jorge Mas (CICA President), Jean-Louis Marchand (FIEC President), Shinji MOURI (Japanese Ministry of Land, Infrastructure, Transport and Tourism MLIT, Vice-Minister for Land, Infrastructure and Hokkaido Development), Yasuki KAIBORI (Japanese MLIT, Deputy Minister for Construction, Engineering and Real Estate Industry), Ricardo Platt (FIIC President)

FIEC Steering Committee and CICA Board representatives during FIEC General Assembly in Paris (1/12/2017)



From left to right: (1st row) Daniel Nicolardot, Jorge Mas, Emre Aykar, Daniel Tardy, Maria Ángeles Asenjo, Alexander Pongratz (2nd row) Philip Crampton, Michail Daktylidis, Johan Willemen, Ulrich Paetzold, Jean-Louis Marchand, Kjetil Tønning, Giuseppe Cafiero

© Photos Harald Gotschalk

to improve the perception of fund providers and regulators of the rate of default of the infrastructure asset class in compared with others. CICA monitors the prudential standards established by financial and insurance regulators. CICA is also working to highlight the inadequacy of the budgetary governance of States and local authorities applicable to public financing of infrastructure and is promoting a revision of International Public Sector Accounting Standards norms applicable to infrastructure projects.

V. Medium companies

The working group on Medium Companies, chaired by Jose Carlos Martins (Brazil) focuses on improving medium companies' access to international infrastructure markets. The group also looks at capacity strengthening actions delivered by MDBs and Development Finance Institutions and promotes the deployment of local workforces through contractual training, during the execution of projects financed by the MDBs.

VI. Sustainable Construction

The CICA working group on Sustainable Construction, chaired by Alfredo Echavarría (Chile) focuses on the KPESIC platform built around Latin America's experience and on the roadmap proposed by the Global Alliance for Building and Construction (GABC). The CICA President participated in the Buildings Day organised on the fringes of COP23. CICA has also developed

contacts with the International Initiative for a Sustainable Built Environment (iiSBE).

C) CICA Upcoming Events

I. CICA Mission to Washington, April 18-22, 2018

During the International Monetary Fund and World Bank (WB) Spring Meetings, a CICA delegation will meet Hartwig Schafer, WB Vice-President Global Themes, and Manuela Ferro, WB Vice-President Operations Policy and Country Services (OPCS). It is planned to discuss MDBs analysis and new ways to meet infrastructure needs as well as the participation of medium-sized companies in MDBs-financed contracts. Topics on the agenda also include the implementation of the WB's new Procurement Policy and in particular ESHS requirements, the use of the SOURCE Platform and the use of ISO 37001 Standard and/or the inclusion in the loan agreement of clauses stating that the borrower is committed to World Bank integrity guidelines.

II. CICA Spring Board – General Assembly in Mexico City, April 23-24, 2018

The Mexican Chamber of Construction (CMIC) will host the next CICA Spring Board-General Assembly meeting in Mexico City.

EUROPEAN CONSTRUCTION FORUM (ECF)

Michail Daktylidis, GR
Vice-President in charge of
ECF matters

Ulrich Paetzold, FIEC
Rapporteur



A) What is the European Construction Forum (ECF)?

The ECF is a platform for cooperation on issues of common interest between independent organisations representing key players in the construction sector and participating on a voluntary basis.

B) What are the aims of ECF?

The principal aim of the ECF is the establishment and recognition of a single comprehensive policy approach for the European construction sector through raising the awareness of decision makers at European level of the specific issues affecting the sector as a whole. To this end, the participating organisations strive to arrive at consensual views on issues of common interest.

This should lead over time to:

- greater involvement of the construction sector in the preparation of all EU legislative acts, programmes and actions that have a bearing on the sector.
- a more coherent and coordinated approach by the European institutions towards the sector. ECF will develop specific actions on the basis of this Manifesto and the EU agenda.

C) Current activities

The digitalisation of business, often called “Industry 4.0” - the “fourth industrial revolution” – is also taking place in the construction industry and will soon affect the entire value chain. In order to address this challenge, which we commonly refer to as “Construction 4.0” (see also the report of the specific Working Group, page 15), the European federations participating in ECF are developing joint positions and actions. The ECF participants envisage the inclusion of other relevant stakeholders, in order to facilitate the general change of mind which will be necessary, in order to make best use of the potential offered by increasingly more powerful information and communication technologies.

ECF has already held two meetings in 2018 and expects to have a joint document later in the year.



website: www.ecf.be



COMMUNICATION

Philip Crampton, IE
Vice-president in charge of
Communication



FIEC Newsletter "Construction matters"

(1/week) Our weekly Newsletter highlights the latest main issues or current events. Interested in knowing more about a specific news item? ... a simple 'click' on the button 'read more' directs the reader to more information, such as position papers or articles on the FIEC website or other websites.

How to subscribe to our Newsletter? very simple!

- on our website www.fiec.eu, just click on the box 'Newsletter' and fill in your details,
- or simply send us your e-mail to info@fipec.eu.



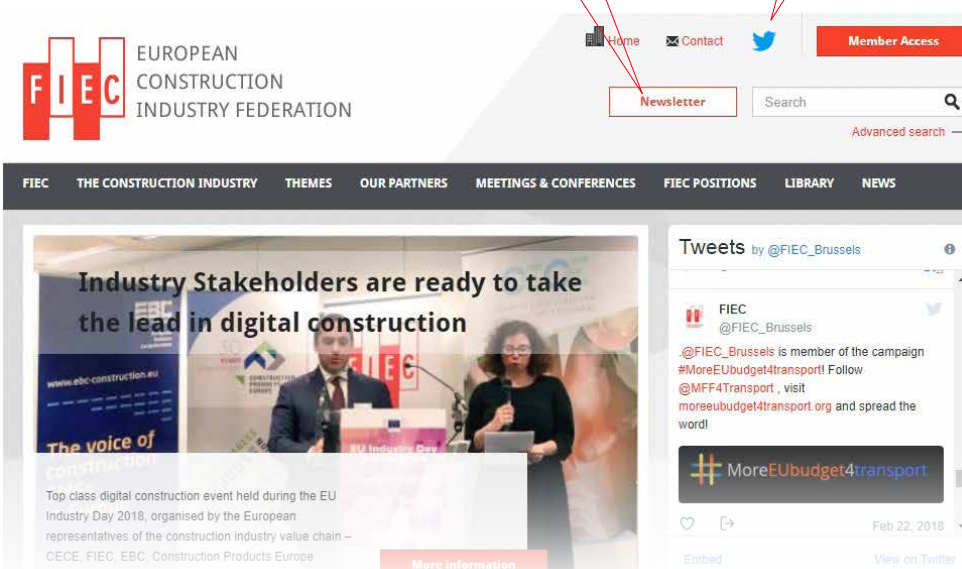
Twitter Account: @FIEC_Brussels

FIEC tweets on priority issues such as:
#Construction4.0, #BIM, #Infrastructure,
#Construction2020, #CleanEnergypackage, # Employment,
#Digitalisation #Social #Skills, #Growth, #EU, and many other events ...

Follow us on twitter! @FIEC_Brussels



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www.fiec.eu

- The public website presents FIEC activities and the concerns of the European construction industry. It is aimed at an external audience and contains thematic issues, news and positions papers
- The "members only" part has protected access and contains the communication tool connecting FIEC and its Member Federations.

FIEC Periodical Publications



- **Construction Activity in Europe (1/year)**

FIEC publishes a document giving information about construction activity in Europe. Each country is analysed individually and Europe as a whole under the following headings:

- general economic overview (general economic situation, general economic policy, government policies in relation to the construction industry)
- overall construction activity (including employment)
- new housebuilding
- rehabilitation and maintenance of residential buildings
- non-residential building
- civil engineering and construction abroad.

The data are given over a period of 5 to 10 years. Forecasts are made for up to 1 year.



- **Annual Report (1/year)**

This document constitutes a complete survey of the FIEC issues and positions between two General Assemblies.



- **Construction in Europe – Key Figures (1/year)**

This publication, in practical pocket format, provides the reader with a brief survey of the essential key figures of construction activity in Europe and in the world as well as a brief presentation of FIEC and the sector.



- **Article in Construction Europe (10/year)**

For many years FIEC has worked together with the magazine "Construction Europe", publishing a monthly article on EU currents affairs.

FIEC Occasional Publications



- **Making BIM a global success**

This publication represents FIEC's manifesto for ensuring the widespread application of BIM across the entire construction industry, ensuring that no company, large or small, is unable to participate in BIM-based building and infrastructure projects. Interoperability and open BIM are emphasised and the publication outlines the main challenges facing the industry and the solutions that could facilitate the uptake of BIM. It also explains how BIM can help to deliver the big EU policies.



- **10 Proposals to tackle Climate Change - Solutions from the Construction Industry**

Construction is a high productivity, high technology industry and a major force in the global resources available to tackle climate change. FIEC proposes collaboration with city planners and local public authorities to ensure that robust maintenance and construction programmes tackle the climate change challenge head on, anticipating the risks and providing the solutions. "Construction is the solution industry!"



- **FIEC manifesto for action - EU term 2014-2019**

The FIEC Manifesto defines 10 areas for action, which play a key role in establishing an adequate framework for ensuring that the construction sector can actually be the efficient lever for growth and jobs in all parts of the EU industry, in a sustainable and future-oriented way.



Construction in Europe: 100 years of FIEC (2005)



The FIEC Principles for Sustainability (2005) including the CSR Principles



FIEC/EIC Statement on Corruption Prevention in the Construction Industry (2009)

All these publications and further information can be obtained from the FIEC office in Brussels. For EIC publications, please refer to p. 41

FIEC representatives in conferences and debates (selection)

Economic and Legal themes

MEDEF workshop on the European Investment Projects Portal (EIPP)

Brussels, BE (5/4/2017)

Opening by Jean-Louis Marchand, FIEC President

“EIPP helping regions and cities to successfully promote their projects”, hosted by the European Committee of the Regions

Brussels, BE (30/5/2017)

Presentation by Christine Le Forestier, Director Economic and Legal Affairs

Construction Insurance Forum

Paris, FR (6/7/2017)

Presentation on the European services e-card by Christine Le Forestier, Director Economic and Legal Affairs

Conference European Long-Term Investment

Brussels, BE (26/10/2017)

Participation of Nicolas Gaubert (FR), Rapporteur of the FIEC Working Group Infrastructure & Financing

INTERMAT event “The intelligent and connected road: infrastructure and challenges”

Oslo, NO (13/12/2017)

Presentation by Kjetil Tønning, FIEC President Elect

Social themes

EDA Conference “Attracting workers to the sector”

Brussels, BE (16/6/2017)

Presentation by Domenico Campogrande, Director Social Affairs

“On the road to a greener future: acting on employment and skills”, Public Conference hosted by EESC

Brussels, BE (22/6/2017)

Participation of Ulrich Paetzold, FIEC Director General

“A European skills base: a tool to improve health and safety at work”, Conference organised by UNIIEP (international association of painting contractors)

Brussels, BE (25/8/2017)

Participation of Ulrich Paetzold, FIEC Director General

EEN Seminar (European Employers Network) hosted by BusinessEurope

Brussels, BE (26/10/2017)

Round Table “State of play and future of European Social Dialogue”

Participation of Ulrich Paetzold, FIEC Director General

“Skills for Construction Machinery”, CECE event hosted by MEP Brando Benifei

Brussels, BE (22/11/2017) – European Parliament

Participation of Jean-Louis Marchand, FIEC President

Technical and Environmental themes

DDR Forum 2017 (DDR – Demolition, Decontamination and Recycling)

Brussels, BE (14/6/2017)

“Digitalisation and BIM applied to construction products”

Presentation by Claude Dumoulin, Chairman of TEC-2

Forum organised by ETICS (External Thermal Insulation Composite System)

Warsaw, PL (5/10/2017)

Panel on EU regulation / Revision of the EPBD

Presentation by Sue Arundale, Director

Technical and Environmental Affairs

CECE Technical Forum (Committee for European Construction Equipment)

Brussels, BE (12/10/2017)

Construction 4.0, BIM and Skills

Presentation by Sue Arundale, Director

Technical and Environmental Affairs

Workshop “Impact of ICT on BIM” organised by Digital Europe

Brussels, BE (17/10/2017)

Presentation by Kjetil Tønning, FIEC President Elect

High Level Conference of the European Innovation Partnership (EIP) on Raw Materials

Brussels, BE (8/11/2017)

Participation of Ulrich Paetzold, FIEC Director General

European Robotics Forum “Construction Robots from the End User Perspective”

Tampere, FIN (14/3/2018)

Presentation and participation in panel discussion and workshop

by Sue Arundale, Director Technical and Environmental Affairs

European and FIEC themes

Single Market Forum 2017 – Workshop “Barriers on the Single Market”

Malta, MT (19/6/2017)

Participation of Ulrich Paetzold, FIEC Director General

Public Hearing on the EU Services e-card, hosted by EP – IMCO (Committee on the Internal Market and Consumer Protection)

Brussels, BE (21/6/2017)

Participation of Ulrich Paetzold, FIEC Director General

Meeting with a delegation of representatives of the Italian Federation ANCE Frosinone

Brussels, BE (22/6/2017)

Presentation by Domenico Campogrande, Director

Social Affairs on FIEC activities and lobbying

Conference “Challenges to Cohesion Policy 2014-2020”, event co-organised by our Bulgarian Member Federation BBC, EP Committee on Regional Development & Stroitel newspaper

Sofia, BG (20/7/2017)

Presentation by Kjetil Tønning, FIEC President Elect

“Proposed Services e-card: the point of view of daily practitioners”, practical hearing co-organised by FIEC, EFBWW, UNI Europa, Insurance Europe, Amice, Bipar and hosted by the EESC

Brussels, BE (8/9/2017)

Presentation of FIEC messages for the construction sector

by Vincent Detemmerman, Director Administration & International - Belgian Construction Confederation

“Engineers Day” organised by ECCE European Council of Civil Engineers

Vienna, AT (5/10/2017)

Challenges and perspectives of the

European Construction Industry

Participation as keynote speaker of Jean-

Louis Marchand, FIEC President

Meeting with representatives of the Japanese Construction Sector

Brussels, BE (22/2/2018)

Presentation on FIEC issues by Christine Le Forestier,

Director Economic and Legal Affairs and by Domenico

Campogrande, Director Social Affairs

Conference on “Digital Construction” co-organised by FIEC, CECE, Construction Europe and EBC as part of the EU event # EU Industry Day

Brussels, BE (22/2/2018)

Participation of Kjetil Tønning, FIEC President Elect

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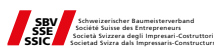
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CONSTRUCTION 4.0

COMPETITIVENESS

GROWTH

ENERGY NETWORKS

EMPLOYMENT

ENERGY EFFICIENCY

SOCIAL INFRASTRUCTURE

BIM

WATER NETWORKS

ENVIRONMENT

TRANSPORT INFRASTRUCTURE

IT-NETWORKS

CONSTRUCTION IS THE SOLUTION INDUSTRY

YOUTH EMPLOYMENT

RESOURCE EFFICIENCY

JOBS

SKILLS TRAINING/EDUCATION

ENERGY PRODUCTION

STANDARDISATION

INFRASTRUCTURE

INNOVATION

CLIMATE CHANGE

RECYCLING



EUROPEAN CONSTRUCTION
INDUSTRY FEDERATION



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