

## F E D E R A T I O N   N E W S

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### EFCA BAROMETER autumn 2016 - State of the consulting engineering sector

*Market stabilisation continues and expectations are positive for the coming six months.*

Every six months EFCA is conducting a market survey among its members. The results are published in the [Barometer report](#).

In the latest EFCA Barometer report (data collected in November 2016), the market signals are positive.

Nine out of nineteen countries expect an improvement in order stock over the next six-month period. Of the remaining ten countries in the survey all, except for Turkey, expect orders to be at an unchanged level.

In addition, eight countries expect turnover to increase in the first half of 2017, and importantly, the survey shows an increase in profitability. Finally, there is an expectation that numbers of staff will increase in 10 out of 19 countries.



In conclusion, activity in the consulting engineering industry in Europe is improving. However, Greece and Turkey are expected to face continued difficulties and are the exception to the rule in this survey.

The main challenges as perceived by the sector are lack of qualified staff, lack of investments and low fees.

Another challenge is the increasing competition from contractors. This challenge can be disruptive for the building industry and poses both threats and opportunities for consulting engineering companies.

A second growing challenge is political instability which is affecting the market. Some of the factors are not predictable such as the Brexit-related uncertainty, geopolitical tensions and security threats in Europe and the outcome of elections and referenda across Europe in 2017.

## ***EFCA argues for stronger involvement and visibility in identification phase of projects***

*To prepare bankable projects in the EU partner countries, the European Commission should create enabling environments for European engineering consultancies.*

In a follow-up letter to DG DEVCO (International Cooperation and Development), EFCA highlighted our industry's key role in providing knowledge and experience in quality investment projects under the EU blending frameworks.

EFCA also reiterated its request for early and easy access to all relevant information on business opportunities, preferably through the use of a single centralised website.

Finally, EFCA proposed to DG DEVCO to reconsider the introduction of a traineeship scheme in each and every development project. Such scheme would allow tenderers to propose young staff (recent graduates and with less than 5 years of experience) and to recover the cost through a specific budget line in the reimbursable expenses of the financial offer.

## ***Third edition of the Regional Infrastructure Conference***



*Under the theme 'The road to smart infrastructure', FIDIC, ACES (Association of Consulting Engineers of Serbia) and EFCA jointly organise the two-day conference in Belgrade on 9-10 March 2017.*

Selected regional and international speakers, legal experts and FIDIC's and EFCA's own committee members will bring up emerging issues and important developments in essential business and industry topics.

## ***2016 Sector Review: industry on path to recovery***

*Every year in December, the Swedish Association of Architects and Consulting Engineers (STD) publishes a detailed sector survey and market review of the consulting, engineering, and architectural groups in Sweden and the Nordic countries along with an international outlook.*



This year's report shows growing turnover and improved profitability.

Consolidation in the industry continued in 2016 but at a slower pace than before.

STD cooperates with its Nordic colleagues in FRI, FRV&SAMARK, RIF and SKOL&ATL from Denmark, Iceland, Norway and Finland, respectively.

Learn more by [ordering](#) the 2016 Sector Review.

## E F C A A G E N D A

Task Force on BIM	Brussels	27.01.2017
Sustainable Development Committee	virtual	08.02.2017
Board of Directors meeting	Brussels	10.02.2017
European External Aid Committee	Brussels	14.02.2017
FIDIC – ACES – EFCA Regional Infrastructure Conference	Belgrade	09-10.03.2017
Task Force on BIM	Brussels	22.03.2017
D&S meeting	Brussels	06.04.2017
Board of Directors meeting	Napoli	21.04.2017
Board of Directors meeting	Copenhagen	01.06.2017
<b>2017 EFCA GAM &amp; CONFERENCE</b>	Copenhagen	1-2.06.2017
Board of Directors meeting	Budapest (tbc)	7-8.09.2017 tbc)
FIDIC Conference	Jakarta	1-3.10.2017
Board of Directors meeting	Brussels	24.11.2017

***THE 2017 CONFERENCE WEBSITE WILL BE LAUNCHED ON 1 FEBRUARY 2017  
Check the EFCA website!***



Copenhagen - National Aquarium Denmark, Den Blå Planet



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## #invest EU

### **European Fund for Strategic Investments (EFSI) expected to trigger over €164 billion in investments**

*As of December 2016, operations approved under the Investment Plan for Europe represent a total financing volume of €30.6 billion.*

The European Investment Bank (EIB) approved 176 infrastructure projects for financing under the European Fund for Strategic Investments (EFSI). These projects represent a financing volume of €22.4 billion.

The European Investment Fund (EIF) approved 244 SME financing agreements, with total financing under the EFSI of €8.1 billion.

[List of EFSI projects](#)

[Project information](#) by country and by sector

## INTERNAL MARKET

### **Commission requests member states to remove unjustified obstacles to market entrants**

*The Commission is taking [further steps](#) with regard to Austria, Cyprus, Denmark, Germany, and Lithuania on the ground that the requirements imposed on certain service providers run counter to the [Services Directive](#) (Directive 2006/123/EC).*

The Commission is acting to address the following concerns to:

- **Austria:** seat requirements for architects and engineers (a complementary reasoned opinion);
- **Cyprus:** shareholding requirements for all engineering professions, including civil engineers and architects (a referral to the Court of Justice of the EU);
- **Denmark:** authorisation/compulsory certification requirement for certain

construction services (a letter of formal notice);

- **Germany:** minimum and maximum tariffs for architects and engineers (a referral to the Court of Justice of the EU);
- **Lithuania:** multidisciplinary restrictions on certain construction service providers (a letter of formal notice).

Member states now have two months to notify the Commission of measures taken to remedy the situation.

See also: **10 January 2017 EC proposals to give a boost to the [Services sector](#)**

### **BIM: first milestone in European standardisation**

Thanks to the close collaboration with the International Organisation for Standardisation (ISO), [CEN/TC 442](#) (Building Information Modelling) adopted three International Standards as European ones:

- [EN ISO 16739:2016](#) (WI=00442002): Industry Foundation Classes (IFC) for data sharing in the construction and facility management industries (ISO 16739:2013)
- [EN ISO b12006-3:2016](#) (WI=00442003): Building construction - Organisation of information about construction works - Part 3: Framework for object-oriented information (ISO 12006-3:2007)
- [EN ISO 29481:2016](#) (WI=00442001): Building information models - Information delivery manual - Part 2: Interaction framework (ISO 29481-2:2012).

Further work is ongoing to complement the European BIM standardisation project.

EFCA has liaison status in CEN/TC 442. Christophe Castaing (Syntec-Ingénierie), chair of the EFCA BIM Task Force, acts as EFCA representative in the CEN/Technical Committee 442.

### **European Structural and Investment Funds: almost €130 billion – 20% of the total 2014-2020 envelope –invested**

*In addition to the first progress [report](#), the Commission launched an upgraded version of the [Cohesion Open Data platform](#).*

New sections show the performance of ESI Funds investments and measure target achievement.

### **8 new initiatives under the EU's Partnership Instrument**

*The [Partnership Instrument](#) supports the EU's strategic objectives in external relations through enhancing partnerships with third countries worldwide.*

The new package includes a flagship programme framed within the external dimension of the EU's Digital Single Market Strategy (€8 million), climate actions in the Arctic (€1.5 million) and the countries of the Gulf Cooperation Council (€3 million) and support to Carbon Capture & Storage (€1 million) technology in China. Other initiatives are designed to promote greener environmental policies and legislation (€3 million) and to fight illegal wildlife trafficking in China.

The Partnership Instrument will extend its action to Latin America (€7 million) and to South East Asia (€7.5 million). €1.2 million will be devoted to reinforce policy dialogues with the EU's strategic partners.

### **Boosting start-ups in Europe**

*The [Start-up and Scale-up Initiative](#) aims to give Europe's many innovative entrepreneurs every opportunity to become world leading companies.*

The initiative pulls together all possibilities that the EU already offers and adds a new focus on venture capital investment, insolvency law and taxation.

In this context, the Commission and the European Investment Bank are launching a Pan-European Venture Capital Fund of Funds.

### **€213.5 million EU aid to Tunisia**

*Four new programmes will support [Tunisia](#) to ensure the transition to democracy and guarantee socioeconomic development for all its citizens.*

### **SEMed Private Renewable Energy Framework (SPREF)**

*The European Bank for Reconstruction and Development (EBRD) and [the Union for the Mediterranean \(UfM\)](#) launched a €227.5 million financing framework, aimed at the development of private renewable energy markets in [Egypt](#), [Jordan](#), [Morocco](#) and [Tunisia](#).*

The programme aims to mobilise additional investment from other parties, including the [Climate Investment Funds' Clean Technology Fund \(CTF\)](#) and the [Global Environment Facility \(GEF\)](#), of up to €834 million.

Financing will be accompanied by targeted technical cooperation support for the implementation of renewable energy projects in the region.

### **Emergency Trust Fund for Africa: series of actions adopted**

28 new measures for a total amount of €381 million will increase stability in the region and tackle the root causes of irregular migration and forced displacement in the [Sahel region and the Lake Chad Basin](#).

A fourth package of actions in the [Horn of Africa](#) under the EU Trust Fund, worth almost €170 million, will provide sustainable support to the many refugees, displaced persons and host communities in the region.

### **Urban Agenda: new call for projects to help cities**

*Cities can directly apply and get EU funding under the [Urban Innovative Actions initiative](#).*

The call, with a budget of €50 million from the [European Regional Development Fund \(ERDF\)](#), will reward the most innovative projects in three categories, in line with the priorities of [the Urban Agenda for the EU](#): the integration of migrants, urban mobility and the circular economy.

The call runs until mid-April 2017.

## **MISCELLANEOUS**

### **2030 Clean Energy EU**

*The [Winter Energy Union Package](#) sets several legislative frameworks, targets and measures: energy policy, use of renewable resources, energy efficiency measures and targets, and market design initiatives.*

As part of the energy efficiency package, the Commission proposed a review of the [Energy Performance of Buildings Directive \(EPBD\)](#) and relevant articles of the [Energy Efficiency Directive \(EED\)](#).

### **EU's 2020 targets on energy and climate within reach**

*The [European Environment Agency report 'Trends and projections in Europe 2016'](#) shows that certain trends are alarming, in particular for transport.*

[Member states](#) must step up national ambition and efforts to achieve the 2020 and 2030 EU targets, and to keep the EU on a path to a low-carbon, competitive and circular economy by 2050.

### ***European action for sustainability***

*The Commission is setting out a strategic approach for achieving sustainable development in Europe and around the world.*

The [Communication on the next steps for a sustainable European future](#) explains how the Commission's 10 political priorities contribute to implementing the UN 2030 Agenda for Sustainable Development and how the EU will meet the Sustainable Development Goals (SDGs) in the future.

A second [Communication on a renewed partnership with African, Caribbean and Pacific \(ACP\) countries](#) proposes building blocks for a new, sustainable phase in EU-ACP relations after the Cotonou Partnership Agreement expires in 2020.

A third [Communication on a new European Consensus on development](#) proposes a shared vision and framework for development cooperation, aligning the EU's development policy with the 2030 Agenda.

Simultaneously, Eurostat released the [publication](#) 'Sustainable Development in the European Union - A statistical glance from the viewpoint of the UN Sustainable Development Goals', providing an overview of the current situation of the EU and its member states in relation to the 17 SDGs.

### ***Better understanding the world's surface water: Global Surface Water Explorer***

The new [online interactive mapping tool](#), developed by the Commission's [Joint Research Centre](#) and Google Earth Engine, highlight changes in the Earth's surface water over the past 32 years.

### ***2016 Enlargement Package: reforms are moving forward in most countries, albeit at different speeds***

The annual [Enlargement Package](#) includes detailed assessments of the state of play in each candidate country and potential candidate and sets out guidelines on reform priorities.

### ***Boosting Building Renovation: What Potential and Value for Europe?***

The [paper](#) reviews the literature on the state of the building stock and assesses various policy options and their potential for boosting the energy efficient renovation of buildings in Europe.

### ***Sustainability transitions: Now for the long term***

The joint [report](#) by the European Environment Agency (EEA) and the European Environment Information and Observation Network (Eionet) explores the innovations and new knowledge that can catalyse and guide transition to a sustainable, low-carbon future.

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