



WELCOME ADDRESS

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ECTP High Level Group

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ECTP The Construction Sector

Key aspects

- Structures and shapes all economic activities of today and tomorrow
- An instrument to revive economy and investments
- A fragmented sector

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ECTP The Construction Sector

Key aspects (cont'd)

- Accounts for 40% of all resource consumption
- Faces large environmental issues
- An actor for energy consumption management
- 25% of total industrial output
- Yields relatively low profit margins
- Faces world actors competition
- Significantly contributes to European export

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Top 20 Global Contractors

Rank 2005	Rank 2004	Firm	Country	2004 revenue (\$ million)
1	1	VINCI	France	24 268
2	2	BOUYGUES	France	20 148
3	9	HOCHTIEF AG	Germany	14 975
4	8	GRUPO ACS	Spain	14 928
5	5	BECHTEL	USA	14 424
6	3	SKANSKA AB	Sweden	14 138
7	7	TAISEI CORP.	Japan	13 757
8	6	KAJIMA CORP.	Japan	13 214
9	4	SHIMIZU CORP.	Japan	12 597
10	10	OBAYASHI CORP.	Japan	12 565

(reference ENR august 2005)

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Top 20 Global Contractors (2)

Rank 2005	Rank 2004	Firm	Country	2004 revenue (\$ million)
11	14	CHINA RAILWAY ENG.CORP.	Chine	11 612
12	17	KBR	USA	10 899
13	12	TAKENAKA CORP.	USA	10799
14	11	CENTREX DALLAS	USA	10670
15	15	CHINA RAILWAY CONST.CORP.	Chine	10493
16	**	EIFFAGE	France	10482
17	16	CHINA STATE CONST.EN'G CORP.	Chine	10271
18	23	FERROVIAL	Spain	9855
19	13	ROYAL BAM GROEP NV	Pays Bas	9108
20	20	FIMAG FINANZ INDUS.MGMT AG	Austria	8131

(reference ENR august 2005)

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Top 30 Design Firms

Rank 2005	Rank 2004	Firm	Type of firm	Country	2004 revenue (\$ million)
1	1	URS, San Francisco	EAC	USA	2849,9
2	2	SNC Lavalin International	EC	Canada	2672,4
3	3	FLUOR Corporation	EC	USA	2259,6
4	7	ATKINS	EA	UK	2091,8
5	5	AECOM Technology	EA	USA	2089
6	4	JACOBS	EAC	USA	1970
7	9	CH2M HILL Cos.ltd	EAC	USA	1737,5
8	6	BECHTEL	EC	USA	1561
9	12	AMEC PLC	EC	UK	1485
10	10	KBR	EC	USA	1425,7

(reference ENR august 2005)

EAC : Eng.Archit.Contractor / EC : Eng.Contractor / EA : Eng.Architect / GE : Soils or Geotec. Geotech.Eng.

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Top 30 Design Firms (2)

Rank 2005	Rank 2004	Firm	Type of firm	Country	2004 revenue (\$ million)
11	13	TETRA Tech. Inc	E	USA	1359
12	14	FUGRO NV	GE	Pays Bas	1261
13	8	PARSONS	EC	USA	1104,8
14	16	ARCADIS NV	E	Pays Bas	1102
15	17	MOTT MACDONALD	E	UK	932,1
16	15	PARSONS BRINCKERHOFF	EAC	USA	894,4
17	**	EARTH TECH INC.	EC	USA	806
18	20	ARUP GROUP LTD	E	UK	793,2
19	**	WORLEYPARSONS	EC	Australie	747,5
20	19	BLACK & VEATCH	EC	USA	731,7

(reference ENR august 2005)

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Top 30 Design Firms (3)

Rank 2005	Rank 2004	Firm	Type of firm	Country	2004 revenue (\$ million)
21	11	ABB LUMMUS GLOBAL	EC	USA	720,3
22	18	MWH	EC	USA	704
23	22	LOUISE BERGER GROUP	EA	USA	673,8
24	34	SHAW GROUP Inc.	EC	USA	629,2
25	26	WSP GROUP PLC	E	UK	593,8
26	31	JAAKKO POYRY GROUP	E	Finland	589
27	27	FOSTER WHEELER Ltd	EC	USA	565
28	30	JGC Corp.	EC	Japan	560
29	24	EGIS	E	France	549
30	32	RAMBOLL GRUPPEN A/S	E	Denmark	528,4

(reference ENR august 2005)

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Key figures (EU 15 – 2004)

- ❑ **1 004 billion € of estimated construction investment**
- ❑ **9.9 % of Gross Domestic Product**
- ❑ **50.8 % of Gross fixed Capital Formation**
- ❑ **2.4 million enterprises, mainly SMEs**
 - ❑ 97% with fewer than 20 operatives
 - ❑ 93% with fewer than 10 operatives

(reference www.fiec.be)

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Key figures (EU 15 – 2004) (cont'd)

- ❑ **14 million operatives**
 - ❑ 7.1% of Europe's work force
 - ❑ 28.5% of industrial employment
- ❑ **26 million workers in the EU depend, directly or indirectly, on the construction sector**
- ❑ **Biggest industrial employer in Europe**

(reference www.fiec.be)

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ECTP The Construction Sector 

Our objectives

- ❑ **To remain a world leader**
- ❑ **To increase competitiveness**
- ❑ **To create jobs**
- ❑ **To become sustainable**
- ❑ **To transform a traditional sector**

**To reach those ambitious goals,
we need to develop a strong R&D
supported by the European Union**

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